I. Vision, Mission and Goals

A. Executive Summary


VISION

The Division of University Advancement will be recognized as a national leader in effective institutional advancement as a result of increased public and 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, fundraising and government relations programs.

GOALS

1. Increase philanthropic support for the University.

2. Increase local, state and federal government support for the University.

3. Improve the reputation and visibility of the University.

4. Ensure that alumni are informed, involved and committed to the success of the University.

5. 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 pledges).

Craft strategies with deans, faculty, directors of development (DODs) and volunteers to solicit gifts from alumni, parents, friends, corporation 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. Increase local, state and federal government support for the University.

**Initiative: 2 (a)** Achieve excellent relations between the University and local government.
Create opportunities for University representatives to maintain ongoing dialogue and contact with area city and county officials.

Government and Community Relations (G&CR) staff members meet regularly with Mayor of Columbia, City Council members, County Council members and chief administrators of the respective bodies to keep them informed and supportive of University programs and activities (plans for Innovista, etc.)

**Initiative: 2 (b)** Work closely with appropriate University officials to maintain and enhance internal and external participation with special programs and projects.

Governmental and Community Relations staff will provide support and resources for planning and implementing events such as annual MLK Celebration; annual Black Faculty and Staff programs; TRIO Program activities; annual Booker T. Washington Foundation Celebration; annual I. DeQuincey Newman Institute for Peace and Social Change Celebration; and Dargan Scholarship Annual Gala.
Initiative: 2 (c) Utilize contacts with other institutions of higher education and membership in peer organizations to glean ideas and improve operations for the office of Governmental and Community Relations.

G&CR staff will meet regularly with Medical University of South Carolina and Clemson lobbyists to find ways to collaborate on legislative priorities. The University of South Carolina will host the 2008 SEC Governmental Relations Council meeting and participate in listserv exchanges.

Initiative: 2 (d) Enhance on-campus events for legislators.

G&CR staff will work closely with the President’s Office and the Special Events staff to re-invigorate events in new, updated locations.

Initiative: 2 (e) Improve communications with administration and key University officials about actions taken on initiatives in state and local government.

Develop and implement an electronic update system to disseminate weekly or biweekly status reports.

Goal 3. Improve the reputation and visibility of the University.

Initiative: 3 (a) Enhance multimedia production capability for Division of University Advancement in order to better motivate audiences and position 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: 3 (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: 3 (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: 3 (d)** Increase exposure of 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: 3 (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: 3 (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/email 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: 3 (g) 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: 3 (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: 3 (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: 3 (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.
Goal 4. Ensure that alumni are informed, involved and committed to the success of the University

Initiative: 4 (a) Create a visible symbol of the vital role alumni play in the life of the institution by furthering plans for the Alumni Center. Define the scope and program of the facility and develop a plan to secure private funds for the Alumni Center.

Finalize Alumni Center location, defined scope, architectural plans and cost estimates. Revise fundraising plans and corresponding case statement to develop printed campaign materials. Secure private gifts for the center.

Initiative: 4 (b) Provide $600,000 in direct scholarship support to outstanding, incoming Carolina freshmen.

Raise support for Alumni Scholars, Legacy Scholars, Richard T. Greener Scholars and Carolina Scholar finalists as well as for Parents Weekend activities and mentoring programs.

Initiative: 4 (c) Gauge the success of our various and collective efforts to engage alumni in the life of our institution.

Use the Engagement Data Gathering and Evaluation (EDGE) system to measure alumni engagement indicators. Establish technology for event data entry and transfer student membership and legacy program data to Millennium.

Initiative: 4 (d) Increase total membership to 36,000 or more by July 1, 2009; increase annual member retention from 64 to 69 percent.

Refine measurement of member retention expenses and target highest retention for lowest cost. Improve marketing and communication with members to discern their needs and interests and to reinforce membership value.

Initiative: 4(e) Build key partnerships with entities within and without the University that will extend the reach and maximize the effectiveness of Alumni Association programs and activities.

Maximize partnership opportunities with the colleges/schools and Athletics to share resources and joint programming opportunities.
**Initiative: 4 (f)** Maximize partnership opportunities with University Development and Advancement.

Implement strategies to convert non-donor members to donors and non-member donors to members. Strengthen interaction with the Call Center, the Carolina Action Network, Media Relations and Publications to increase membership and member involvement with the University.

**Initiative: 4 (g)** Maximize partnership opportunities with the Division of Student Affairs.

Provide support for scholarship programs, new student orientation programs, freshmen send-off parties, the Garnet Circle Student Alumni Council, the student membership program, semi-annual ring ceremonies, the senior connection program, minority recruitment and support programs and the Graduation Gala and Toast to the Future. Increase the Alumni Recruitment Network to 10,000 enrollees.

**Initiative: 4 (h)** Maximize partnerships with vendors and affinity relationships to increase resources available for association programs and activities.

Secure sponsorship revenue to underwrite 25% of program needs and explore the implementation of a corporate membership program.

**Initiative: 4 (i)** Provide opportunities for social networking among alumni.

Develop alumni clubs in the top 20 geographic areas, increasing from 66 to 70 the percentage of alumni involved. Expand club programs, use host committees extensively, and ensure volunteer service is rewarding. Promote the Gamecock Network through the implementation of a weekly staff Weblog.

**Initiative: 4 (j)** Increase power and effectiveness of communications functions to ensure all alumni are treated as insiders and shareholders in the enterprise.

Implement comprehensive advertising program to include billboards, print, television, radio, non-Association Web sites and athletic venues. Continue to disseminate merchandise bearing the “My Carolina” logo, while working with University Publications to ensure branding is complete in all CAA collaterals.
**Initiative: 4 (k)** Research in-house capabilities and/or select a full-service, top-of-the-line Web company to redevelop Web site.

Incorporate customer relationship management system (including generational marketing), streamline EMGAM technology, and provide interactive and graphically advanced elements on an as-needed basis. Include e-store capability.

**Initiative: 4 (l)** Effectively target solicitations and promotions by employing generational marketing.

In partnership with Marketing and Communications, execute a pilot program of targeted membership mailings with a personal appeal from a graduate of each decade. Similarly make use of segmented invitations and Web site tools.

**Goal 5. Refine and improve administrative programs and processes with respect to operational services for internal and external stakeholders.**

**Initiative: 5 (a)** Enhance quality control of Advancement Administration operations to yield improved efficiency and effectiveness.

Work closely with the Budget Office and Foundations to monitor University and private funding resources. Review procedures and, based on staff surveys and focus groups, implement improved/new programs to strengthen customer service.

**Initiative: 5 (b)** Advance institutional promotional opportunities, particularly once the new University President assumes office, to encourage constituents’ heightened information, involvement and commitment.

Maximize opportunities to introduce new president to 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: 5 (c)** 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: 5 (d)** 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: 5 (e)** Complete Phase II of Gamecock Club’s conversion.

Transfer financial data via online portal to Millennium. Design and implement pledge billing program. Train staff.

**Initiative: 5 (f)** Explore the functionality of Millennium’s Events World.

Review benefits of implementation of Events module. Test functionality and create standards.

**Initiative: 5 (g)** Begin outlining the framework for a data warehouse.

Work with SAGE, Inc. to explore value of data warehouse implementation. Determine appropriate data elements.

**Initiative: 5 (h)** 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: 5 (i) Revise and update Special Events guidelines and procedures for use within the University Advancement Division.

With Advancement Services, review functionality of Millennium’s Events World module. Review other software packages and the Special Events Web site to match expanding needs. Survey Southeastern Conference and other South Carolina institutions special events operations to determine best practices.

Initiative: 5 (j) Support the President's House through the transition to the new administration.

Identify necessary House projects/upgrades and needs that may be supported by in-kind gifts.

Initiative: 5 (k) Improve communication with and visual recognition of University donors, particularly Horseshoe Society members, to increase involvement and commitment.

Implement visual recognition plan for major donors and gift naming opportunities. Investigate, and implement if approved, hosting a Horseshoe Society event during Spring Homecoming.
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 2009 survey response follows.
# USC Columbia Campus
## Fall "A" Fund Review
### For the Period Ending 10/31/2007

**Unit Name and Number:**

**Responsibility 18 - Advancement**

<table>
<thead>
<tr>
<th>A Fund Resources and Uses</th>
<th>Budget 10/31/2007</th>
<th>Actuals YTD 10/31/2007</th>
<th>% of Budget</th>
<th>Actuals 10/31/2006</th>
<th>Dollar Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Resources:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General Fund Only (31000)</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
<td>0.00%</td>
<td></td>
</tr>
<tr>
<td>State Appropriation (31500/31525)</td>
<td>$ -</td>
<td>$ -</td>
<td>$ 383,687</td>
<td>$ (383,687)</td>
<td>-100.00%</td>
<td></td>
</tr>
<tr>
<td>Carryforward (31533/31534)</td>
<td>$ 485,409</td>
<td>$ 485,409</td>
<td>$ 822,763</td>
<td>$ (337,354)</td>
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<tr>
<td>One Time within responsibility (36400/36500)</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
<td>0.00%</td>
<td></td>
</tr>
<tr>
<td>One Time outside responsibility (363XXX/368XXX)</td>
<td>$ 1,100,000</td>
<td>$ 1,100,000</td>
<td>$ -</td>
<td>$ 1,100,000</td>
<td>+100.00%</td>
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</tr>
<tr>
<td>Permanent within responsibility (37400/37500)</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
<td>0.00%</td>
<td></td>
</tr>
<tr>
<td>Permanent outside responsibility (373XXX/378XXX)</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
<td>0.00%</td>
<td></td>
</tr>
<tr>
<td><strong>Subtotal 3’s</strong></td>
<td>$ 1,585,409</td>
<td>$ 1,585,409</td>
<td>$ 1,206,450</td>
<td>$ 378,569</td>
<td>31.40%</td>
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</tr>
<tr>
<td>Tuition, Fee and Departmental Revenue (4XXX)</td>
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<td>$ 42,077</td>
<td>$ 41,510</td>
<td>$ 567</td>
<td>1.40%</td>
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<tr>
<td>Net Transfers (excluding VCM - 81XXX/86XXX)</td>
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<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
<td>0.00%</td>
<td></td>
</tr>
<tr>
<td><strong>Total Resources</strong></td>
<td>$ 1,755,663</td>
<td>$ 1,627,466</td>
<td>$ 1,247,960</td>
<td>$ 379,526</td>
<td>39.40%</td>
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<tr>
<td>Preset Assessment (81150 &amp; 81160)</td>
<td>$ 7,753,889</td>
<td>$ 2,864,632</td>
<td>$ 2,208,860</td>
<td>$ 375,772</td>
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<tr>
<td>Preset Assessment (86150 &amp; 86160)</td>
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<td>$ -</td>
<td>$ -</td>
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<td></td>
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<tr>
<td><strong>Net Resources</strong></td>
<td>$ 9,509,552</td>
<td>$ 4,212,116</td>
<td>$ 3,456,829</td>
<td>$ 750,288</td>
<td>21.80%</td>
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</tr>
</tbody>
</table>

**Uses:**

- Personal Services - All (51XXX) $5,105,629 $2,033,333 39.80% $1,890,051 $143,282 7.60%
- Fringe Benefits (546XXX) $1,362,513 $537,448 39.40% $473,823 $83,523 13.50%
- Total Personal Services and Fringe $6,468,142 $2,570,781 39.70% $2,363,874 $207,286 8.80%
- Expenditures (50XXX) $2,388,947 $ - 0.00% $ - $ - 0.00%
- Contractual Services (52XXX) $453,721 $350,621 75.60% $224,508 $126,113 56.20%
- Supplies (53XXX) $641,020 $315,112 49.20% $301,894 $13,218 4.40%
- Fixed Costs (54XXX) exempt Fringe $29,819 $6,688 21.90% $8,780 $ (3,122) 33.60%
- Contingency (55XXX) $ - $ - 0.00% $ - $ - 0.00%
- Equipment/Boots (56XXX) $49,916 $ - 0.00% $ - $ - 0.00%
- Renovations (57XXX) $ - $3,064 0.00% $ - $3,064 0.00%
- Other Charges (59XXX) $ - $ - 0.00% $ - $ - 0.00%
- Total Other Uses $528,009 $263,948 50.00% $104,125 $159,823 153.50%
- Subtotal Other Uses $3,041,413 $411,407 13.50% $431,057 $ (19,650) 4.60%
- **Total Uses** $9,509,552 $2,982,186 31.40% $2,794,631 $187,555 6.70%
- **Balance** $ - $1,229,332 $ - $662,189 $567,743          |

Notes: The State Appropriation of $383,687 was moved to Preset Assessment (VCM Allocation) for fiscal year 2008. The increase of $314,273 in VCM allocation is for the unit's share of the 3% pay package, January 2008 employer health insurance increase, and retirement increase. In the BOT budget the unit received permanent funds of $217,054 for a web presence office. The General Fund transferred permanent funds of $250,000 to the unit. The unit's carryforward decreased by $337,554 or 41.00%, from the prior year. "A" Fund filled FTE's has increased by 20 from last year.

**Budget Analyst Name:** Ralph B. Summer  
**Unit Contact:** Canteri Heath

**Comments/Concerns:** With the year 33.3% complete, actual expenditures are 31.40% of budget. The unit received one-time funding of $1,100,000 from the Provost (RSP 02). Budget entries to move the one-time funding and the pay package have not occurred, pending resolution of D paying issues. Government and Community Relations account will return to the President (RSP 04), but reporting will remain to Advancement. The unit is funding recurring expenditures with one-time funding sources. These issues are under review and entries will occur when this issue is resolved.

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**Division of University Advancement • Blueprint for Service Excellence • FY 2008–09**
### USC Columbia Campus
Fall "A" Fund Budget Review
For the Period Ending 10/31/2007

#### CHANGE IN BUDGET
Unit Name and Number: Responsibility 18 - Advancement

<table>
<thead>
<tr>
<th>Resources:</th>
<th>Budget 10/31/2007</th>
<th>Budget 10/31/2006</th>
<th>CHANGE</th>
<th>% CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Fund Only (31000)</td>
<td>$ 383,687</td>
<td>$ 383,687</td>
<td></td>
<td>0.00%</td>
</tr>
<tr>
<td>State Appropriation (31500/31525)</td>
<td>$ 822,763</td>
<td>$ 837,354</td>
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<tr>
<td>Carryforward (31533/31534)</td>
<td>$ 1,100,000</td>
<td>$ 1,100,000</td>
<td></td>
<td>0.00%</td>
</tr>
<tr>
<td>One Time within responsibility (36400/36500)</td>
<td>$ -</td>
<td>$ -</td>
<td></td>
<td></td>
</tr>
<tr>
<td>One Time outside responsibility (363XX/368XX)</td>
<td>$ -</td>
<td>$ -</td>
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</tr>
<tr>
<td>Permanent within responsibility (37400/37500)</td>
<td>$ -</td>
<td>$ -</td>
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</tr>
<tr>
<td>Permanent outside responsibility (373XX/376XX)</td>
<td>$ -</td>
<td>$ -</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Subtotal 3's</strong></td>
<td>$ 1,585,409</td>
<td>$ 1,260,450</td>
<td>$ 324,959</td>
<td>25.83%</td>
</tr>
<tr>
<td>Tuition, Fee and Departmental Revenue (4XXXX)</td>
<td>$ 170,254</td>
<td>$ 168,800</td>
<td>$ 1,454</td>
<td>0.85%</td>
</tr>
<tr>
<td>Net Transfers (excluding VCM - 81XXX/86XXX)</td>
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<td>$ -</td>
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<td></td>
</tr>
<tr>
<td><strong>Total Resources</strong></td>
<td>$ 1,755,663</td>
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<tr>
<td>Preset Assessment (81150 &amp; 81160)</td>
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<td>17.01%</td>
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<tr>
<td>Preset Assessment (88150 &amp; 88160)</td>
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<td>$ -</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Net Resources</strong></td>
<td>$ 9,509,522</td>
<td>$ 7,344,827</td>
<td>$ 2,164,695</td>
<td>29.38%</td>
</tr>
<tr>
<td>Uses:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal Services - All (51XXX)</td>
<td>$ 5,105,626</td>
<td>$ 5,118,715</td>
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<td>-0.26%</td>
</tr>
<tr>
<td>Fringe Benefits (546XX)</td>
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</tr>
<tr>
<td><strong>Total Personal Services and Fringe</strong></td>
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<tr>
<td>Contractual Services (52XXX)</td>
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<td>Supplies (53XXX)</td>
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<td>$ 640,614</td>
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</tr>
<tr>
<td>Fixed Costs (54XXX) exc. Fringe</td>
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<td>$ 12,895</td>
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</tr>
<tr>
<td>Contingency (55XXX)</td>
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<td>$ -</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equipment/Books (56XXX)</td>
<td>$ 49,916</td>
<td>$ 81,316</td>
<td>$ 31,400</td>
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</tr>
<tr>
<td>Renovations (57XXX)</td>
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<td>$ 1,000</td>
<td>$ 1,000</td>
<td>100.00%</td>
</tr>
<tr>
<td>Other Charges (59XXX)</td>
<td>$ -</td>
<td>$ -</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IIT's (6XXXX)</td>
<td>$ 528,009</td>
<td>$ 528,009</td>
<td>-</td>
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</tr>
<tr>
<td><strong>Subtotal Other Uses</strong></td>
<td>$ 3,041,413</td>
<td>$ 3,186,402</td>
<td>$ 1,655,011</td>
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</tr>
<tr>
<td><strong>Total Uses</strong></td>
<td>$ 9,509,522</td>
<td>$ 7,344,827</td>
<td>$ 2,164,695</td>
<td>29.38%</td>
</tr>
<tr>
<td><strong>Balance</strong></td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
<td></td>
</tr>
</tbody>
</table>

**Notes:**
- The State Appropriation of $383,687 was moved to Preset Assessment (VCM Allocation) for fiscal year 2008. The increase of $314,273 in VCM allocation is for the unit's share of the 3% pay package, January 2008 employer health insurance increase, and retirement increase. In the BOT budget the unit received permanent funds of $179,354 for a web presence office. The General Fund transferred permanent funds of $250,000 to the unit. The unit's carryforward decreased by $337,354 or 41.00% from the prior year. "A" Fund filled FTE's has increased by 20 from last year.

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**Budget Analyst Name:** Ralph B. Summer

**Comments/Concerns:**
- Until budget transfers for one-time funding and the pay package are allocated in the unit, a comparison is not meaningful.
## USC Columbia Campus
### Spring "A" Fund Review
#### For the Period Ending 2/29/2008

### Unit Name and Number: Responsibility 18 - Advancement

<table>
<thead>
<tr>
<th>Resources:</th>
<th>Budget 2/29/08</th>
<th>Actuals YTD 2/29/08</th>
<th>% of Budget</th>
<th>Actuals 2/28/07</th>
<th>Change from 2/28/07</th>
<th>Dollar Change</th>
<th>% Change</th>
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<tr>
<td>General Appropriation (31000)</td>
<td>$</td>
<td>$</td>
<td></td>
<td>$</td>
<td>$</td>
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<td>0.00%</td>
</tr>
<tr>
<td>State Appropriation (31500/31525)</td>
<td>$</td>
<td>$</td>
<td></td>
<td>$</td>
<td>$</td>
<td></td>
<td>0.00%</td>
</tr>
<tr>
<td>Carryforward (31523/31534)</td>
<td>$</td>
<td>$</td>
<td></td>
<td>$</td>
<td>$</td>
<td></td>
<td>0.00%</td>
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<tr>
<td>One Time within responsibility (36400/36560)</td>
<td>$</td>
<td>$</td>
<td></td>
<td>$</td>
<td>$</td>
<td></td>
<td>0.00%</td>
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<tr>
<td>One Time outside responsibility (363XX/363XX)</td>
<td>$</td>
<td>$</td>
<td></td>
<td>$</td>
<td>$</td>
<td></td>
<td>0.00%</td>
</tr>
<tr>
<td>Permanent within responsibility (37400/37500)</td>
<td>$</td>
<td>$</td>
<td></td>
<td>$</td>
<td>$</td>
<td></td>
<td>0.00%</td>
</tr>
<tr>
<td>Permanent outside responsibility (373XX/378XX)</td>
<td>$</td>
<td>$</td>
<td></td>
<td>$</td>
<td>$</td>
<td></td>
<td>0.00%</td>
</tr>
<tr>
<td>Subtotal 3's</td>
<td>$ 3,269,433</td>
<td>$ 3,269,433</td>
<td>97.30%</td>
<td>$ 2,305,927</td>
<td>$ 1,045,882</td>
<td>$ 1,045,882</td>
<td>48.40%</td>
</tr>
<tr>
<td>Tuition, Fee and Departmental Revenue (4XXX)</td>
<td>$ 10,862,845</td>
<td>$ 8,297,545</td>
<td>76.40%</td>
<td>$ 6,723,647</td>
<td>$ 1,573,898</td>
<td>$ 1,573,898</td>
<td>23.49%</td>
</tr>
<tr>
<td>Net Transfers (excluding VCM - 810XX/860XX)</td>
<td>$ 10,862,845</td>
<td>$ 8,297,545</td>
<td>76.40%</td>
<td>$ 6,723,647</td>
<td>$ 1,573,898</td>
<td>$ 1,573,898</td>
<td>23.49%</td>
</tr>
<tr>
<td>Total Resources</td>
<td>$ 3,450,259</td>
<td>$ 3,355,829</td>
<td>97.30%</td>
<td>$ 2,305,927</td>
<td>$ 1,045,882</td>
<td>$ 1,045,882</td>
<td>48.40%</td>
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<tr>
<td>Preset Assessment (81150 &amp; 81160)</td>
<td>$ 7,412,999</td>
<td>$ 4,941,736</td>
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<td>$ 4,417,720</td>
<td>$ 524,016</td>
<td>$ 524,016</td>
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<tr>
<td>Preset Assessment (86150 &amp; 86160)</td>
<td>$</td>
<td>$</td>
<td></td>
<td>$</td>
<td>$</td>
<td></td>
<td>0.00%</td>
</tr>
<tr>
<td>Net Resources</td>
<td>$ 10,862,845</td>
<td>$ 8,297,545</td>
<td>76.40%</td>
<td>$ 6,723,647</td>
<td>$ 1,573,898</td>
<td>$ 1,573,898</td>
<td>23.49%</td>
</tr>
</tbody>
</table>

#### Uses:
- **Personal Services - All (51XXX)**
- **Fringe Benefits (54XXX)**
- **Total Personal Services and Fringe**

| Expenditures (50000)                           | $ 583,253      | $                   |             | $              | $                   |              | 0.00%    |
| Contractual Services (520XX)                   | $ 1,273,856    | $ 735,588           | 57.80%      | $ 491,534      | $ 245,024           | $ 245,024    | 49.86%   |
| Supplies (530XX)                                | $ 755,000      | $ 635,619           | 82.90%      | $ 643,987      | $ (8,278)          | $ (8,278)   | -1.30%   |
| Fixed Costs (54XXX) exc. Fringe                 | $ 52,915       | $ 21,931            | 65.90%      | $ 25,229       | $ (3,577)          | $ (3,577)   | -14.20%  |
| Contingency (55XXX)                             | $              | $                   |             | $              | $                   |              | 0.00%    |
| Equipment/Books (56XXX)                         | $ 111,770      | $                   |             | $ 12,969       | $ (12,969)         | $ (12,969)  | -100.00% |
| Reallocations (57XXX)                           | $              | $                   |             | $ 5,064        | $ 5,064            | $ 5,064     | 0.00%    |
| Other Charges (59XXX)                           | $              | $                   |             | $ 526,260      | $ (526,260)        | $ (526,260) | -100.00% |
| IT's (60XXX)                                    | $ (526,009)    | $ (526,260)         | 94.10%      | $ (244)        | $ (244)            | $ (244)     | -85.20%  |
| Subtotal Other Uses                             | $ 1,240,687    | $ 869,592           | 40.60%      | $ 886,105      | $ (16,513)         | $ (16,513)  | -1.90%   |
| Total Uses                                      | $ 10,862,845   | $ 6,123,548         | 56.40%      | $ 5,799,523    | $ 324,025           | $ 324,025   | 5.00%    |
| Balance                                         | $              | $ 2,173,997         |             | $              | $                   |              |          |

#### Notes: The State Appropriation of $383,587 was moved to Preset Assessment (VCM Allocation) for fiscal year 2008. The increase of $314,213 in VCM allocation is for the unit's share of the 3% pay package, January 2008 employer health insurance increase, and retirement increase. In the BOT budget the unit received permanent funds of $119,954 for a web presence office. The General Fund transformed permanent funds of $740,000 to the unit. The unit's carryforward decreased by $337,354 or 41.00% from the prior year. "A" Fund filled FTE's has increased by 20 from last year based on the fall, but spring to spring comparison shows increase at 6%. 1050.

---

### Budget Analyst Name: Ralph B Summer
### Unit Contact: Gail Henry

### Comments/Concerns:
With the year 66.7% complete, actual expenditures are 56.40% of budget. The unit received permanent funding of $341,294 from the President (RSP 01) in support of the Government and Community Relations account, which has been moved to the President's responsibility, but the funds retained by Advancement. The unit will receive one-time funding from the Medical School of $63,323 for a development officer's salary and fringe commitment. This transfer has not been recorded and will be budgeted when the transfer is made. The unit received one-time funding of $1,100,000 from the Provost (RSP 02), and $5,500 from Student Affairs (RSP 98) for recruitment support for the Alumni Office. Also, the unit has received one-time funding from Academic units of $1,337,230 in support of salaries and fringe for Development officers. This commitment extend through FY09 if the development officers remain in the academic units. Funding for Student Affairs was returned, as was a portion of Social Work's commitment. The transfer from Athletics has not been made as of this date.
### CHANGE IN BUDGET

**Unit Name and Number:** Responsibility 18 - Advancement

<table>
<thead>
<tr>
<th>A Fund Resources and Uses</th>
<th>Budget 2/28/2008</th>
<th>Budget 2/28/2007</th>
<th>CHANGE</th>
<th>% CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resources:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General Fund Only (31000)</td>
<td>$ -</td>
<td>$ -</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>State Appropriation (31500/31525)</td>
<td>$ -</td>
<td>$ 383,687</td>
<td>-</td>
<td>$ (383,687)</td>
</tr>
<tr>
<td>Carryforward (31533/31534)</td>
<td>$ 465,409</td>
<td>$ 822,763</td>
<td>-</td>
<td>$ (357,354)</td>
</tr>
<tr>
<td>One Time within responsibility (36400/36500)</td>
<td>$ -</td>
<td>$ -</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>One Time outside responsibility (363XX/368XX)</td>
<td>$ 2,442,730</td>
<td>$ 1,031,500</td>
<td>$ 1,411,230</td>
<td>46.09%</td>
</tr>
<tr>
<td>Permanent within responsibility (37400/37500)</td>
<td>$ -</td>
<td>$ -</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Permanent outside responsibility (373XX/378XX)</td>
<td>$ 341,294</td>
<td>$ -</td>
<td>$ 341,294</td>
<td>-</td>
</tr>
<tr>
<td>Subtotal 3's</td>
<td>$ 3,269,433</td>
<td>$ 2,237,950</td>
<td>$ 1,031,483</td>
<td>46.09%</td>
</tr>
<tr>
<td>Tuition, Fee and Departmental Revenue (4XXX)</td>
<td>$ 180,817</td>
<td>$ 170,254</td>
<td>$ 10,563</td>
<td>6.19%</td>
</tr>
<tr>
<td>Net Transfers (excluding VCM - 81XXX/86XXX)</td>
<td>$ -</td>
<td>$ -</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Total Resources</td>
<td>$ 3,450,250</td>
<td>$ 2,408,204</td>
<td>$ 1,042,046</td>
<td>43.27%</td>
</tr>
<tr>
<td>Preset Assessment (81150 &amp; 81160)</td>
<td>$ 7,412,595</td>
<td>$ 6,626,575</td>
<td>$ 786,020</td>
<td>11.92%</td>
</tr>
<tr>
<td>Preset Assessment (86150 &amp; 86160)</td>
<td>$ -</td>
<td>$ -</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Net Resources</td>
<td>$ 10,862,845</td>
<td>$ 9,034,779</td>
<td>$ 1,828,066</td>
<td>20.23%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Use:</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Services - All (51XXX)</td>
<td>$ 6,852,160</td>
<td>$ 5,231,215</td>
<td>$ 1,620,945</td>
<td>30.82%</td>
</tr>
<tr>
<td>Fringe Benefits (546XX)</td>
<td>$ 1,869,988</td>
<td>$ 1,367,062</td>
<td>$ 502,926</td>
<td>36.94%</td>
</tr>
<tr>
<td>Total Personal Services and Fringe</td>
<td>$ 8,722,158</td>
<td>$ 6,598,277</td>
<td>$ 2,123,881</td>
<td>32.19%</td>
</tr>
<tr>
<td>Expenditures (50000)</td>
<td>$ 583,255</td>
<td>$ 926,206</td>
<td>$ (342,951)</td>
<td>-58.83%</td>
</tr>
<tr>
<td>Contractual Services (52XXX)</td>
<td>$ 1,273,856</td>
<td>$ 1,186,683</td>
<td>$ 87,173</td>
<td>7.32%</td>
</tr>
<tr>
<td>Supplies (53XXX)</td>
<td>$ 760,900</td>
<td>$ 711,158</td>
<td>$ 49,742</td>
<td>6.95%</td>
</tr>
<tr>
<td>Fixed Costs (54XXX) exc. Fringe</td>
<td>$ 32,915</td>
<td>$ 39,548</td>
<td>$ (6,633)</td>
<td>-16.85%</td>
</tr>
<tr>
<td>Contingency (55XXX)</td>
<td>$ -</td>
<td>$ -</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Equipment/Books (56XXX)</td>
<td>$ 111,770</td>
<td>$ 99,916</td>
<td>$ 11,854</td>
<td>11.90%</td>
</tr>
<tr>
<td>Renovations (57XXX)</td>
<td>$ -</td>
<td>$ 1,000</td>
<td>$ (1,000)</td>
<td>-100.00%</td>
</tr>
<tr>
<td>Other Charges (59XXX)</td>
<td>$ -</td>
<td>$ -</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>IT's (60XXX)</td>
<td>$ (628,009)</td>
<td>$ (528,009)</td>
<td>$ (100,000)</td>
<td>-190.82%</td>
</tr>
<tr>
<td>Subtotal Other Uses</td>
<td>$ 2,140,687</td>
<td>$ 2,436,502</td>
<td>$ (295,815)</td>
<td>-12.14%</td>
</tr>
<tr>
<td>Total Uses</td>
<td>$ 10,862,845</td>
<td>$ 9,034,779</td>
<td>$ 1,828,066</td>
<td>20.23%</td>
</tr>
</tbody>
</table>

**Notes:** Unit has had significant budget changes including one-time funds from the Provost and Academic units. Additional funds from the President and for the pay package and health insurance increase.

---

**Budget Analyst Name:** Ralph Summer

**Comments/Concerns:**

---

Division of University Advancement • Blueprint for Service Excellence • FY 2008–09
### University Advancement Strategic Plan and Budget

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Recurring</td>
<td>6,789,970</td>
<td>7,098,322</td>
<td>7,412,595</td>
<td>7,412,595</td>
<td>7,412,595</td>
<td>7,412,595</td>
<td>7,412,595</td>
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<tr>
<td>Estimated Pay Package</td>
<td>220,292</td>
<td>314,273</td>
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<td></td>
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<tr>
<td>Other Revenue (from Alumni Assoc)</td>
<td>134,440</td>
<td>170,254</td>
<td>170,254</td>
<td>170,254</td>
<td>170,254</td>
<td>170,254</td>
<td>170,254</td>
</tr>
<tr>
<td>Other Revenue (from Printing)</td>
<td></td>
<td>20,000</td>
<td>20,000</td>
<td>20,000</td>
<td>20,000</td>
<td>20,000</td>
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<tr>
<td>One-Time Support - Provost</td>
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<td>1,252,500</td>
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<tr>
<td>One-Time Support - Student Affairs</td>
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<tr>
<td>One-Time Support - Research</td>
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<tr>
<td>One-Time Support - President</td>
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<tr>
<td>One-Time Support - CFO</td>
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<tr>
<td>Recurring FY 08 Initiative</td>
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<tr>
<td>Other Recurring Support</td>
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<tr>
<td>Additional Support (to be determined)</td>
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<tr>
<td>Deans Support 100% DODs</td>
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<tr>
<td>Education Foundation</td>
<td>600,000</td>
<td>445,000</td>
<td>750,000</td>
<td>750,000</td>
<td>750,000</td>
<td>750,000</td>
<td>750,000</td>
</tr>
<tr>
<td>R Funds</td>
<td>100,000</td>
<td>100,000</td>
<td>100,000</td>
<td>100,000</td>
<td>100,000</td>
<td>100,000</td>
<td>100,000</td>
</tr>
<tr>
<td>All-Funds Inflow</td>
<td>8,960,202</td>
<td>11,392,756</td>
<td>10,767,297</td>
<td>10,767,297</td>
<td>10,767,297</td>
<td>11,067,454</td>
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</tbody>
</table>

### Expenditures

<table>
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<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Operating Expenses</td>
<td>9,419,233</td>
<td>9,647,921</td>
<td>10,850,000</td>
<td>10,850,000</td>
<td>10,850,000</td>
<td>10,850,000</td>
<td>10,850,000</td>
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<tr>
<td>IIT's</td>
<td>(838,268)</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>Uses of Education Foundation Funds</td>
<td>600,000</td>
<td>322,500</td>
<td>322,500</td>
<td>322,500</td>
<td>322,500</td>
<td>322,500</td>
<td>322,500</td>
</tr>
<tr>
<td>Uses of R - Funds</td>
<td>100,000</td>
<td>100,000</td>
<td>100,000</td>
<td>100,000</td>
<td>100,000</td>
<td>100,000</td>
<td>100,000</td>
</tr>
</tbody>
</table>
### University Advancement Strategic Plan and Budget

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<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>All-Funds Outflow</td>
<td>9,282,965</td>
<td>10,070,421</td>
<td>11,272,500</td>
<td>11,272,500</td>
<td>11,272,500</td>
<td>11,272,500</td>
<td>11,272,500</td>
</tr>
<tr>
<td>Prior All-Funds Balance</td>
<td>822,763</td>
<td>680,348</td>
<td>1,992,683</td>
<td>1,487,480</td>
<td>982,277</td>
<td>477,074</td>
<td>272,028</td>
</tr>
<tr>
<td>Ending All-Funds Balance</td>
<td>680,348</td>
<td>1,992,683</td>
<td>1,487,480</td>
<td>982,277</td>
<td>477,074</td>
<td>272,028</td>
<td>66,962</td>
</tr>
</tbody>
</table>

Note: All-funds balance in FY 2007 = 194,939 (Foundation) + 485,409 (A-finds) = 680,348
From: Cantey Heath  
To: Jeffcoat, Charlie  
Date: 10/11/2007 3:34:59 PM  
Subject: Space Planning - University Advancement

Good Afternoon Charlie,

Attached please find completed templates that include responses to questions 2, 3 and 4. Below please find departmental responses to question 1: **What have you done this year to accommodate current staff?**

**Alumni Association**

To accommodate staff growth, the Alumni Association moved cube walls, added cube walls, and downsized existing cubes to accommodate additional staff.

**Government and Community Relations**

The Department of Governmental Relations has grown to 5 employees over the last year. Because we have no permanent space, we have one staff member working in an independently rented space, one staff member working from home, one who has moved three times in one year (from cubicle to temporary office spaces that belong to another division), and two other staff members who are in cubicles in another area of the building.

**Advancement Administration**

We recently subdivided two cubicles to make space for 4 staff members.

**University Development**

We recently subdivided three cubicles to make space for 6 staff members. We also reconfigured a conference room into two offices.

**Vice President - University Advancement**

We recently installed cubicle dividers to provide quieter, more effective and efficient work space for outer-office staff. We also sealed one of two doors to the conference room to make better use of space.

**Special Events**

We have undertaken no such projects this year.

**Marketing and Communications**

Our 2 main areas - Media Relations and Web/Print Communications & Strategic Marketing Communications are housed in 2 separate buildings about a mile away from each other: 1600 Hampton Street (part of 7th floor for Media) and 920 Sumter Street (Old War Memorial Building) - Web/Print Communications.

Within these areas, to accommodate current staff needs and some growth, we've converted existing space over the past couple of years as a temporary solution. There is one walled office for Media Relations and a small storage room converted to a video editing suite for our video production hire. The rest are cubes. At 920 Sumter, there are 2 walled offices and the rest are cubes. A break room was converted to an office for the Assistant VP, and carved out space on the landing and on sides of walls for intern stations. A budget request was made this FY for redesigning the work stations at 920 Sumter, improving the design, functionally, and work flow, and increasing capacity by replacing the old cubes with better designed new pieces, but that was not approved.

Thank you for your attention to University Advancement’s space planning needs. Please let me know if we may assist you further.

J. Cantey Heath, Jr.  
Assistant Vice President  
Advancement Administration  
1600 Hampton Street, Suite 736  
University of South Carolina  
Columbia, SC 29208  
telephone: (803) 777-1809  
fax: (803) 777-9708  
e-mail: canteyh@gwm.sc.edu

CC: Jerald, Rick
# Projected Space Needs through FY 2009

<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. Asso. will once again have to shrink cube sizes if staff needs change during the next two fiscal years.</td>
</tr>
<tr>
<td>&amp; storage space</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office &amp; conference room</td>
<td>Government &amp; Community Relations</td>
<td>staff</td>
<td>TBD</td>
<td>Despite several conversations with members of the administration, we have not begun any efforts to relocate to a permanent space. We have participated in planning meetings with the Alum. Asso. In regard to the Alumni Center and our accommodation in a future facility.</td>
</tr>
<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 920 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. Sratetically on a number of fronts and in lieu of the alumni center being built anytime soon, it is important that we explore ways to bring all of our areas under one roof while remaining in the heart of campus. Future planning for needed positions to be competitive will be undertaken—supporting the University’s mission should not be hampered by lack of space.</td>
</tr>
<tr>
<td>and storage space</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Occupant: staff and students
## Projected SpaceNeeds beyond FY2009

<table>
<thead>
<tr>
<th>Type of Space</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 Ass. 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 &amp; conference room</td>
<td>Government &amp; Community Relations</td>
<td>staff</td>
<td>TBD</td>
<td>We will continue to ask for a permanent space, but we do not have plans for any &quot;projects&quot; at this point.</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 and 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</th>
<th>Nature of Renovation/Upfitting Required</th>
<th>Currently Occupied?</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 Asso. 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>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(29) 1600 Hampton St.</td>
<td>Government &amp; Community</td>
<td>Office &amp; conference room</td>
<td>Our division desperately needs a permanent space where all five members of our staff can be in the same location together. We need to be near the State House in a facility that is presentable enough that legislators and other elected officials can visit or attend meetings with our staff. We currently have no meeting or storage space and are forced to “borrow” from other departments or meet at off-campus locations. It increases required effort on all levels of our job performance and decreases efficiency.</td>
<td>Y</td>
</tr>
<tr>
<td>Relations</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(29) 1600 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) 1600 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>(68) 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>Building #/Name</td>
<td>Department</td>
<td>Type of Space (Office, Lab, etc.)</td>
<td>Nature of Renovation/Upfitting Required</td>
<td>Currently Occupied? Y/N</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------------------------</td>
<td>-----------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>(6) War Memorial</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...e.g. web/digital communications section would have writers, designers, web page builders together, development communications the same, etc.</td>
<td>Y</td>
</tr>
<tr>
<td>920 Sumter Street</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(29) 1600 Hampton St</td>
<td></td>
<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></td>
<td></td>
<td></td>
<td>Storage is barely serviceable at both locations-at the very least, some redesign, better storage units need to be created.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Not aware of major repairs needed at Hampton but 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 (85 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>
<td></td>
</tr>
</tbody>
</table>
III. Departmental Assessment Plans

Assessment plans from University Development, Government and Community Relations, 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 $4.2 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.

Indicators:

$100 million raised.
Fill all open positions.
Seminars held and mailings to professional advisors completed.
Raise $6 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.
Results/Use of Results:

During 2006-2007, $66.9 million was raised in private support. Planned gifts totaled $4.7 million and Annual Giving appeals yielded $4.2 million. All positions filled. Four blitzes were conducted. Three to five foundation prospects for each college/unit were identified and solicited as appropriate. Strategies for each college/unit’s Top 25 prospects were completed. Family Fund participation rate was 40%. Advancement Resources, Inc. facilitated training session for Deans, Vice Presidents and DODs.

From July 1, 2007 through April 30, 2008, $84.1 million was raised in private support. Planned gifts totaled $5.1 million and Annual Giving appeals yielded $4.4 million. The Senior Director of Development-Business position remains unfilled. Two blitzes were conducted. Three to five foundation prospects for each college/unit were identified and solicited as appropriate. Strategies for each college/unit’s Top 25 prospects were completed. Family Fund participation rate was 38%. Advancement Resources, Inc. facilitated training session for Deans, Vice Presidents and DODs. In-house training sessions were also conducted.

Assessment Plan—Government and Community Relations

Initiative: 2 (a)

Achieve excellent relations between the University and local government. Create opportunities for University representatives to maintain ongoing dialogue and contact with area city and county officials.

Action Plans:

- Governmental and Community Relations staff members meet regularly with Mayor of Columbia, City Council members, County Council members and chief administrators of the respective bodies.
- Keep local governmental officials apprised of University plans for development of Innovista.
- Brief local governmental officials in a timely manner on all matters requiring action from their bodies.
- Attend as many official City and County Council meetings as possible to “wave the USC Flag”, even if USC has no items on the agendas.
- Participate in City and County events whenever possible.
**Indicators:**

Positive response when University requests are made of local governmental bodies. Local officials take ownership in University and its projects.

**Results/Use of Results:**

During 2008-2008, the University enjoyed enormous support for projects and initiatives at the city and county level. Relations with these bodies is at an all-time high.

**Initiative: 2 (b)**

Work closely with appropriate University officials to maintain and enhance internal and external participation with special programs and projects.

**Action Plans:**

- Governmental and Community Relations staff will provide support and resources for planning and implementing events such as annual MLK Celebration; annual Black Faculty and Staff programs; TRIO Program activities; annual Booker T. Washington Foundation Celebration; annual I. DeQuincey Newman Institute for Peace and Social Change Celebration; and Dargan Scholarship Annual Gala.

**Indicators:**

All programs successfully produced with wide-spread University and community participation.

**Results/Use of Results:**

Participation in 2007-2008 events and programs was exemplary.

**Initiative: 2 (c)**

Utilize contacts with other institutions of higher education and membership in peer organizations to glean ideas and improve operations for the office of Governmental and Community Relations.

**Action Plans:**

- Governmental Relations staff will meet regularly with Medical University of South Carolina and Clemson lobbyists to find ways to collaborate on legislative priorities.
- Host 2008 SEC Governmental Relations Council meeting and participate in listserve exchanges.
Indicators:

Relations among institutions improve and each institution perceives benefits (increased funding, increase in collaborative efforts) of working together. Governmental Relations staff hosts successful event in Columbia in Fall 2008 as indicated by feedback from peer institutions. USC Governmental Relations staff realizes benefits of interactions with colleagues and implements shared ideas/information in our own programs.

Results/Use of Results:

During the 2008 session, cooperation with peer institutions (particularly, Clemson University) has been at an all-time high. In conjunction with the Citadel’s new lobbyist, we have re-initiated the Higher Education Legislation Liaison Organization (HELLO Group) to enhance communication and improve efforts on behalf of all of higher education.

Initiative: 2 (d)

Enhance on-campus events for legislators.

Action Plans:

- Governmental Relations staff will work with President’s Office and Special Events staff to re-invigorate on campus events.

Indicators:

Events held in new, updated locations. University programs are highlighted and positive feedback is received from attendees.

Results/Use of Results:

Planning is underway to create a “Gamecock Caucus” composed of University alumni and friends in the legislature. The Board of Trustees, Business and Finance and the Alumni Association will assist in planning and implementing a social event for this Caucus in early summer 2008. In fall 2008, we will host another event where our University priorities for the 2009 session will be presented to the Caucus.
**Initiative: 2 (e)**

Improve communications with administration and key University officials about actions taken on initiatives in state and local government.

**Action Plans:**

- Develop electronic update that can be disseminated to pertinent officials.

**Indicators:**

Update is sent out on a weekly or twice-monthly basis. Administration and officials are better informed about the success and/or status of University initiatives and indicated by feedback received from those constituencies.

**Results/Use of Results:**

This new initiative will be implemented during 2008-2009.

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**Assessment Plan—University Marketing and Communications**

**Initiative: 3 (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 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:

The indicators for 2007-2008 were exceeded. We produced four new 30-second spots and facilitated creation of two video pieces for Annual Giving.

**Initiative: 3 (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 speakers 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 draft is nearing completion and will be distributed to faculty/staff/leadership by August 2008. The Speakers Bureau plan of action has been created and is awaiting feedback/approval from Provost’s Office. We are awaiting content from the Government/Community Relations Office for additional changes to its Web site.
Initiative: 3 (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 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 email 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-thru 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 position interviews are underway and selection will be completed by June 30, along with necessary infrastructure and training support. New sites are on track for fall 2008 delivery.

**Initiative: 3 (d)**

Increase exposure of 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. Metrics for establishing the “ad value” of media exposure are being developed. A plan for continuing to position our faculty experts in political science, history, and African-American studies related to national Presidential election will be completed by June 2008. We exceeded our Op-Eds placement goal for 2007-2008 and have a plan to meet or exceed the indicators for 2008-2009.

Initiative: 3 (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 more a robust e-form. We have increased integration of donor stories. “Why philanthropy is important” content is planned for print, digital communications, media and speeches/events. The Development communications position will be filled by June 30, 2008.

**Initiative: 3 (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 email 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 change any changes in perception.
Provide regular updates on Web statistics to interested parties

Results/Use of Results:

NPR post-campaign research is now complete, and shows an overall increase in awareness and quality perception. Results are being shared with leadership and used in planning for upcoming strategic efforts with raising brand identity, informing and motivating key audiences. Web site click-thru’s and visits are tracked regularly. Several message pieces have been developed – such as When Numbers Matter, Snapshot, President’s Report – and have been sent to academic influencers nationally.

The Great Momentum, Great Minds, Great Discovery, and Great Recruits theme focus has been rolled out in multiple venues and 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 ACE’s national meeting program. In addition to the Great Momentum recruitment message, we have integrated into marketing campaigns the message of our pioneering and innovative role in the First-Year Student Experience programs and student success leadership.

Initiative: 3 (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 2008-09.

Results/Use of Results:

Consistent standards related to University naming and marks/color have been established and are being shared with communications peers across the University. The full marketing committee may meet bi-monthly during 2008-2009 but size of the group may necessitate quarterly meetings. A Web sub-group has been established.

Initiative: 3 (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:

University Printing continues to meet its indicators of success by handling more 4-color jobs traditionally sent to outside vendors, and operationally, will be self-supporting.

Initiative: 3 (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 re-design 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, VPs, and University PD 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 PD to meet with crisis communications committee to facilitate process of information flow.
• Work with University PD/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, VIP, University PD.
Creation of crisis criteria / Web options, phone tree (and cards), and predefined "first response" messages, summer 2008.
Invite Chris Wuchenich, Scott Prill or another PD officer to crisis communications committee to discuss progress, needs, coordination, spring 2008.

Results/Use of Results:

A crisis communications sub-group has been established. 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. Media training sessions with faculty/leadership incorporate information and exercises related to responding to media during a crisis.
**Initiative: 3 (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.

**Action Plans:**

- Continue producing *Breakthrough* magazine three times a year and distributing to Presidents, Provosts, and VPs of research, as well as key government, industry and media nationally. Continue *Breakthrough* Editorial Board meetings to surface content.
- Conduct regular meetings with John Parks and Rose Booze in Research/Innovista to stay abreast of latest developments.
- Continue maintaining and adding written, graphics, video and audio content to Innovista Web site.
- Plan and execute strategy for maximizing news coverage of Innovista’s new tenants, and other developments.

**Indicators:**

Quality content and on-schedule production of *Breakthrough* magazine three times a year.
Increased media coverage of new Innovista tenants in SC and regional media.
Twice a year Editorial Board meetings conducted.

**Results/Use of Results:**

*Breakthrough* published three times and on schedule during 2007-2008, and distributed to key national academic influencers and foundations. Editorial meetings were held twice in 2007-2008 and planned for same schedule in 2008-2009. We continue to promote the Carnegie research designation and highlight undergraduate, graduate and faculty research in our marketing. We have partnered with *Columbia Business Monthly* to produce content on Innovista for their special edition on Innovista planned for Fall 2008. Media Relations is developing lists of reporters for targeted pitches on key research areas that are signature strengths of Innovista.

Strategic planning continues with John Parks on best ways to market Innovista, content and timing of tenant announcements. The Innovista Web site won First Place honors in the SC Press Association award competition, and a Silver Medal in CASE’s national competition.
Assessment Plan—Carolina Alumni Association

**Initiative: 4 (a)**

Create a visible symbol of the vital role alumni play in the life of the institution by furthering plans for the Alumni Center. Define the scope and program of the facility and develop a plan to secure private funds for the Alumni Center.

**Action Plans:**

- Conclude project to define the scope and costs of the facility.
- Finalize the building’s location.
- Work with the architect, create a space program and cost estimates for the facility.
- Acquire architectural renderings.
- Revise fundraising plans based on updated cost estimates and defined sources of funds.
- Revise the case statement.
- Develop printed and other campaign support materials.
- Secure gifts for the Center.

**Indicators:**

Cost estimates, fund sources, and fund raising plans will have been completed. Renderings of the planned facility will have been prepared. Gifts and pledges will total $8 million by fiscal year end.

**Results/Use of Results:**

Following an extensive site study by the master planning firm of Sasaki Associates, the Board of Trustees approved an excellent site for the Alumni Center at the corner of Pendleton and Assembly streets. The architectural firm Boudreaux Group was retained to undertake the following tasks: (1) programming for all units of University Advancement as well as the University Foundations; (2) development of a site plan; (3) creation of preliminary floor plans; (3) development of presentation-quality renderings; and (4) estimation of construction and other costs. All the tasks have been completed. The fundraising plan has now been revised to include a new gift pyramid and the development of prospect lists has begun.
Initiative: 4 (b)

Provide $600,000 in direct scholarship support to outstanding, incoming Carolina freshmen.

Action Plans:

• Generate revenues to provide support via philanthropy and entrepreneurship for the Alumni and Legacy Scholarships. Assist the Black Alumni Council in generating support for the Richard T. Greener Scholarship.
• Work with Office of Admissions to select outstanding students.
• Provide support to the Carolina Scholar Finalists.
• Support scholarship students and their families through the Alumni Scholars Program, Parents Weekend activities and mentorship programs for Greener Scholars.

Indicators:

Scholarships awarded together with existing commitments will reach $600,000.

Results/Use of Results:

The Alumni Association awarded 14 alumni scholarships, 65 legacy scholarships and 2 Greener scholarships in the spring of 2008. We await final accounting from the Office of Financial Aid, but anticipate the dollar amount to be at or above the $600,000 budgeted.

Initiative: 4 (c)

Gauge the success of our various and collective efforts to engage alumni in the life of our institution.

Action Plans:

• Refine/improve the EDGE (Engagement Data Gathering and Evaluation) data base and populate it with data from prior years to create the baseline.
• Evaluate criteria for measuring and weighting various engagement indicators.
• Create the technology for the real time entry of Alumni Association event data.
• Move student membership and legacy program data to Millennium.
• Develop plan and time table for continuing to expand the measurements.
• Develop a reasonable expectation for improvement annually.

Indicators:

Phase one data elements will have been entered into the database, baseline established and goals for growth specified.
Results/Use of Results:

The Engagement Data Gathering and Evaluation mechanism has been put into place and baseline numbers established. The College of Hospitality, Retail and Sports Management has been recruited to serve as a pilot for expanding the effort beyond Association programs to an all-university indicator of our effectiveness at engaging alumni.

Initiative: 4 (d)

Increase total membership to 36,000 or more by July 1, 2009; increase annual member retention from 64 to 69 percent.

Action Plans:

• Establish methods for accurately measuring the cost of conducting solicitations to achieve the highest possible retention at the lowest possible cost.
• Redesign renewal mailings and messages in accordance with best practices.
• Increase positive contacts with current members.
• Survey current members and target programs to expressed needs and interests.
• Institute and test a variety of strategies designed to reinforce the value of membership.
• Create a dynamic first year experience for new members.
• Create incentives to upgrade from annual to multi-year or life membership.
• Cultivate lapsed members through event invitations, focusing on recently lapsed members and recent graduates.
• Coordinate with the Call Center on new calling plans to increase retention, add joint members and promote club opportunities.

Indicators:

Membership solicitations will have become increasingly more cost effective.
Improved tracking systems will be in place.
Retention of annual members will be at or above 69%.

Results/Use of Results:

Total membership in the Alumni Association stands at 34,000 as we approach the end of the fiscal year. We have redesigned both the look and process for membership renewals and are in the process of evaluating the effectiveness of these changes. Through the Call Center, at events and with revised mailings, we are seeking to upgrade memberships from annual to multi-year or life and from single to joint. Again, the results are being analyzed, but all of these strategies appear to be working and yielding both more memberships and more revenue. The Call Center staff has been trained with scripts rewritten to reflect this emphasis.
We implemented a new four-year membership for students with an enhanced premium. The results will be more apparent after the conclusion of Orientation season, which runs through the month of June.

To encourage lapsed members to rejoin, we have sent invitations to them for all events in their area for the past 10 months. The success of this effort is reflected in the growing membership numbers.

Finally, we are conducting focus groups with the help of the Moore School of Business to better understand how members and non-members perceive the value of membership. When we combine these findings with the results of research conducted jointly with Development, we will develop specific strategies to address them.

**Initiative: 4(e)**

Build key partnerships with entities within and without the University that will extend the reach and maximize the effectiveness of Alumni Association programs and activities.

**Action Plans:**

- Support USCAAD (USC alumni affairs directors) and coordinate and share resources with the schools and colleges.
- Work with the Council of Alumni Societies to grow alumni relations activities across the campus and communicate benefits of association membership to their constituencies.
- Seek joint programming opportunities with colleges and schools, increasing the number of such events from 5 in 2006-2007, to 7 in 2007-2008 and 10 in 2008-2009.
- Implement plan for reciprocal Gamecock Club-Alumni Association membership.
- Seek joint programming opportunities, such as travel to away games and post season play, the Gamecock Village, and Association events that encourage support of athletic teams and programs.
- Support Athletics through Golden Spur Membership.

**Indicators:**

USCAAD meetings will continue to be held on a regular schedule and maintain attendance.
Every college and school will have a named representative on the Council of Alumni Societies.
Initial phase of reciprocal membership plan with Gamecock Club shall have been activated.
Joint travel and event programs (at least 6) will have been conducted.
Association will continue its Golden Spur Membership.
Results/Use of Results:

This year we worked closely with the schools and colleges to create the first-ever Spring Alumni Weekend in May with very encouraging results. Evaluations are still coming in and will be used to refine our plans for next year. We also extended our collaboration with the schools and colleges through the Council of Alumni Societies which now has created by-laws and elected officers and representatives to the Association’s Board of Governors. The Council now has a regular meeting schedule for both fall and spring meetings and is creating a newsletter to keep their members informed.

Our collaboration with Athletics continues to become broader and deeper. We produced a number of joint events including this spring’s Baseball and Softball preview. We continue our support through the Gamecock Club Golden Spur membership, and are currently working on a joint proposal to travel companies for bowl travel.

Initiative: 4 (f)

Maximize partnership opportunities with University Development and Advancement.

Action Plans:

• Conduct research and develop strategies to convert non-donor members to donors and non-member donors to members, thereby maximizing support.
• Conduct alumni receptions as part of receptions with the President.
• Work with the Call Center for membership renewals and upgrades.
• Conduct the Carolina Action Network as a means for ensuring alumni support for the institution’s legislative agenda.
• Work with University Publications to fund, produce and mail *Carolinian* to increasing numbers of current and potential members and donors.
• Work with media relations to highlight success stories throughout the year.
• Provide advertising revenue to offset the costs of producing *Carolinian*.

Indicators:

Member-Donor research will have been conducted, strategies identified and implemented. Alumni communications and awards programs will have served to recognize and laud philanthropy. Four issues of *Carolinian* shall have been produced and mailed with all advertising space sold. *Alumni e-News* will continue to have been produced monthly to provide updates of University news and activities. Membership in the Carolina Action Network will have grown by 5% and attendance at Carolina Day at the Statehouse shall have been maintained at its current level.
Results/Use of Results:

We have concluded our research into the attitudes of members and donors/non-members and non-donors and are in the process of developing strategies to maximize both the number of members and the number of donors. We believe this is the first study of its kind, and, when the strategies are better formulated, we intend to submit our findings for publication.

We have implemented new calling strategies with the Call Center to upgrade memberships and have established a calling plan for 2008-2009. We also collaborated with annual giving on the class gift for the Class of 1958. The class has raised $60,000 to date.

Throughout the state budget process we worked closely with Government Relations to ensure alumni were well informed and actively employed as advocates on our behalf. We held the third annual Carolina Day at the Statehouse with a somewhat revised format that was very well received. While we were not required to implement it, we developed advocate alerts in support of Light Rail and the Centers for Economic Excellence.

We continued our collaboration with Publications and jointly produced quarterly issues of the *Carolinian*, providing 50% of the funding for this publication. We also obtained two new advertisers for the magazine. We continued the practice of sending monthly e-newsletters to all alumni with content provided jointly by Publications and Association staff. Association staff provided a weekly summary of Media Relations’ Higher Education Briefing to all members of the Board of Governors.

**Initiative: 4 (g)**

Maximize partnership opportunities with the Division of Student Affairs.

**Action Plans:**

- Conduct the Alumni, Legacy and Greener Scholarship Programs in conjunction with Office of Admissions.
- Provide financial support to the Carolina Scholars program.
- Work with Orientation programs to provide an excellent program for incoming students and their families.
- Conduct Freshmen Send-Off parties through the alumni club network.
- Conduct the Legacy Program, encouraging the children of graduates to consider Carolina.
- Sponsor the Alumni Scholars Association, the Garnet Circle Student Alumni Council, the student membership program and other efforts to enhance the student experience.
- Promote the official ring tradition and to conduct semi-annual ring ceremonies.
- Encourage the participation of minority alumni in the recruitment, mentoring and support of scholarship programs for minority students.
• Coordinate the Senior Connection program to provide a smooth transition from student to graduate; track participation in events such as Graduation Gala and Toast to the Future to enhance membership strategies for new graduates.
• Grow the Alumni Recruitment Network to 10,000 enrollees.

Indicators:

Thirteen send-off parties were conducted last year and 13 are planned for 2008; 75 alumni shall have been trained as recruiters; scholarship support will have been maintained at present $600,000 level.
Garnet Circle membership shall continue to be maintained at its present level (50 students).
Attendance at student member activities shall increase by 5%.
Retention of student members shall increase by 10%.

Results/Use of Results:

With support from Student Affairs, we conducted freshman sendoffs in 8 locations around the country. At the suggestion of the Admissions Office we implemented a revised scholar selection process that yielded fourteen very highly qualified Alumni Scholars. We continue to evaluate the process to ensure we are successful in this effort. We are also continuing to train alumni recruiters and held two sessions this year. The Atlanta recruiting group is now fully launched and no longer considered a trial program. In addition to the funding for the Alumni Scholars, Legacy Scholars and Greener Scholars, the Association provided $200,000 to Student Affairs in support of Carolina Finalists.

Members of the Black Alumni Council are scheduled to meet with Admissions to discuss how they can more effectively aid the goal of recruiting minority students.

We continued our program of supporting graduating seniors through the Senior Connection. Members of the Association are sponsoring memberships for graduating seniors. We feted seniors at the Senior Party, President’s Graduation Reception and at a Toast to the Future at each of the three Colonial Center commencements.

Once again this year, we will support Freshman Orientation by providing lemonade to parents and incoming students as we recruit student members to the Association.

We continued to sponsor three student organizations: Garnet Circle Student Alumni Council, Student Membership and the Alumni Scholars Association. Attendance at student events increased by more than 15% overall.
**Initiative: 4 (h)**

Maximize partnerships with vendors and affinity relationships to increase resources available for association programs and activities.

**Action Plans:**

- Cultivate and support existing affinity relationships.
- Investigate new opportunities for vendor and affinity relationships.
- Develop written procedures for evaluating and selecting appropriate relationships.
- Insure that advertisers are secured for all issues of Carolinian.
- Secure sufficient sponsorship revenue to underwrite at least 25% of program expense.
- Coordinate alumni contacts by affinity partners to ensure positive responses by members and other alumni and friends.
- Research and, if feasible, implement a corporate membership program.

**Indicators:**

Revenue maintained at current levels or increased.

**Results/Use of Results:**

Overall sponsorship and affinity revenue is expected to be slightly increased this year. Two new advertisers for the Carolinian were obtained and sponsorships for the Young Alumni Golf Tournament were slightly ahead of last year, while major affinity relationships performed at the same level as last year.

**Initiative: 4 (i)**

Provide opportunities for social networking among alumni.

**Action Plans:**

- Develop clubs in the top 20 geographic areas, increasing from 66 to 70 the percentage of alumni who are served by an alumni club.
- Work with clubs to develop a rich array of programs throughout the year to appeal to alumni of diverse ages and interests.
- Offer events that bring together alumni around academic, athletic, community service and other interest areas.
- Use host committees extensively as a means to encourage attendance at planned events.
- Ensure that every invitation is used as an opportunity to share good news, points of pride about the university.
- Ensure that board and committee service is rewarding and of value to both the volunteer and the institution/association.
• Provide programs and activities to enhance the student experience.
• Promote involvement in and through the Gamecock Network. Create a weekly staff Weblog on the Gamecock Network, to help drive traffic to the site, keep staff engaged with and informed about the Gamecock Network and produce publicity opportunities.

Indicators:

Tracking of attendance figures shows increasing popularity of events.
Student membership reaches 4,200.
Clubs will have been established in all of the top 20 geographic areas reaching at least 70% of all alumni.

Results/Use of Results:

Student membership stands at 4,000 as we begin Orientation on June 3. Invitations to events have included “brag points” to insure that they both invite and communicate good news about the University. We are continuing to work on developing alumni clubs in key areas. Fifteen of the twenty identified areas are now operating effectively. The Gamecock Network continues to serve participants, but membership has not substantially increased in the last ten months.

Initiative: 4 (j)

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

Action Plans:

• Work with University Publications on replacing the “alumni” page on www.sc.edu with the Alumni Association’s homepage.
• Incorporate links to all schools and colleges on the Alumni Association homepage and establish a presence on the Web sites of all schools and colleges.
• Prepare for possible Web advertising on television and/or radio Web sites.
• Advertise “in-show” in the coaches’ show package (Spurrier and Odom), broadcast across the Southeast. Highlight personal testimonial videos, varying them across the two seasons, to be followed by a membership push.
• Retain current contractual obligations through Action Sports Media and Gamecock Sports Properties.
• Ensure 100% of signage related to this kind of advertising is updated with campaign logo.
• Continue and enhance tabling opportunities at sporting events with member acquisition as a high priority.
• Promote “My Carolina” through the airwaves on ESPN 93.1 FM during the “Sports Drive with RT” as a free method of publicity as well as 107.5 The Game; decide if other radio opportunities are appropriate for this phase of the campaign.
• Implement the ability to track which individuals are responding to specific methods of advertising.
• Create and begin using versions of logo for affinity groups.
• Launch ‘Where is My Carolina?’.
• Develop and disseminate new “My Carolina” merchandise, both of a higher quality and also of a broader range.
• Implement and maintain communications calendar, soliciting information from staff members regarding publications dates, audiences, and other pertinent information. Make recommendations on mail dates based on calendar; provide read-only access to all who wish to see it.

Indicators:

Reader and listener surveys and tracking numbers show increased awareness. Communications pieces are on message and on time.

Results/Use of Results:

We have revised all signage, including billboards, to be consistent with the “My Carolina” campaign. The membership brochure has been redesigned, again consistent with the new look developed by Publications, and we now have an increased supply and variety of merchandise. The communications calendar has been implemented and is serving as a valuable planning tool for both the Association and our colleagues in Publications. We have developed a plan for tracking communication and are in the process of implementing it.

Initiative: 4 (k)

Research in-house capabilities and/or select a full-service, top-of-the-line Web company to redevelop Web site.

Action Plans:

• Conduct RFP process, carefully articulating our needs.
• Review proposals and select provider.
• Launch new site.
• Enhance and re-launch the e-newsletter; re-vamp process for “Spur of the Moment.”
• Work with Barnes & Noble to co-manage e-store.
Indicators:

New site launched by May 2008. New e-newsletter launched in similar time frame. Agreement finalized on e-store operations. All staff e-mail and voice mail updated.

Results/Use of Results:

We have retained a national firm to create and maintain the Association’s Web site. The soft and hard launches of the new site will take place in June. We continue to work with Barnes & Noble on the launch of the Association’s e-store.

**Initiative: 4 (i)**

Effectively target solicitations and promotions by employing generational marketing.

**Action Plans:**

- In conjunction with membership, execute a pilot program of targeted mailings to specific generations with a personal appeal from a graduate of a specific decade.
- Segment invitations to specific events that target different groups.
- Research ways to integrate generational marketing into Web site.

**Indicators:**

At least two efforts will have been tested and documented.

**Results/Use of Results:**

There are no results to report on this initiative as the effort is just beginning at this time.

**Assessment Plan—Advancement Administration**

**Initiative: 5 (a)**

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, the Provost’s Office 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: 5 (b)**

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:**

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

**Results/Use of Results:**

Advancement Administration scheduled or assisted in coordination of addresses by President Sorensen to Rock Hill, Myrtle Beach, Greenville and Anderson Rotary Clubs during 2006-2008 and to Orangeburg, Columbia, Clemson, Florence and Spartanburg Rotary Clubs during 2007-2008. Also during 2007-2008, we arranged Dr. Sorensen’s addressing business/community leaders in Lexington and Spartanburg as well as civic group presentations by other University leaders.


**Initiative: 5 (c)**

Convert shadow databases into Millennium.

**Action Plans:**

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

**Indicators:**

Analysis of data elements complete. 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 Standards.

**Results/Use of Results:**

In 2007-2008, the Gamecock Club’s biographical and financial data was converted to Millennium. Funds are now deposited by Central Gift Processing and electronically
transferred to the Lutz system within the Gamecock Club each evening. The Law School’s database was also converted to Millennium, thereby eliminating the Raiser’s Edge software in the school. New business rules were created in conjunction with the Gamecock Club, Treasurer’s Office, Controller’s Office and central Gift Processing.

**Initiative: 5 (d)**

Upgrade Millennium software to provide staff with the latest functionality.

**Action Plans:**

- Load new software to the database.
- Test security permissions groups.
- Test all existing exports (i.e. Financial Edge, Payroll, Lutz).
- Test all existing data extracts for standard reports.
- Test all Gift Processing and Prospect Management functions.
- Test functionality of all new software enhancements.
- Develop new training materials.
- Conduct training sessions to inform employees of all new enhancements.

**Indicators:**

Millennium version 7.7 successfully tested and installed.

**Results/Use of Results:**

New version software was installed during 2006-2007 and a system upgrade was initiated during 2007-2008. Annual software updates have been provided to the University to enhance the SAGE Millennium system.

**Initiative: 5 (e)**

Complete Phase II of Gamecock Club’s conversion.

**Action Plans:**

- Electronically transfer financial data from the online 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 online transactions.

Results/Use of Results:

Online gifts totaling over $440,000 were received via the online portal for the USC Educational Foundation, USC Development Foundation and the Business partnership Foundation during 2006-2007. During 2005-2006, $351,435 was received electronically.

**Initiative: 5 (f)**

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/Use of Results:**

The Prospect World in Millennium was reworked during 2007-2008 to enhance the fundraising program. All activities associated with the cultivation and solicitation of major gift prospects are linked to each major gift officer for each college and campus. Focus groups were conducted with University development officers and the system was tailored to the structure presented by Advancement Resources, LLC. New procedures were distributed and all fundraising staff members were trained on the system’s functionality.
**Initiative: 5 (g)**

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/Use of Results:**

Meetings are ongoing regarding the feasibility of a data warehouse.

**Initiative: 5 (h)**

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

**Action Plans:**

- Mine Millennium database and utilize subscription services such as LexisNexis for Development Professionals, Grenzebach & Glier’s DonorScape, and AlumniFinder to obtain information on major gift prospects.
- Verify or create ratings of major gift prospects with ratings over $50,000.
- Notify directors of development of identified major gift prospects and suggest fundraising.
- Utilize “push” data via subscription and free services (Google, etc.) to inform Development officers with timely and relevant published media on their top prospects.
- Add pertinent information from articles to Millennium.
- Add more searches as new top prospects are identified.

**Indicators:**

Track Research statistics of time expenditures per department, administrator, or division, e-mailed identified prospect notifications, and Millennium Tracking Row updates. Track number of articles submitted via e-mail.
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). From July 1, 2007 through April 30, 2008, staff identified prospects with estimating giving potential of $34 to $79 million and updated Millennium records of 4,513 prospects (an average of 451 per month). During the first ten months of the 2007-2008 fiscal year, staff identified 185 major gift prospects with ratings of $50,000-$99,999 or above.

Initiative: 5 (i)

Revise and update Special Events guidelines and procedures for use within the University Advancement Division.

Action Plans:

- Serve on Advancement’s transition team and assist the Board of Trustees Presidential Search Committee as needed.
- Investigate and reevaluate technological resources such as Millennium, FileMaker Pro and other software to better suit our growing data needs and demands.
- Update and revise the Special Events Web site as needed.
- Conduct a survey of the Southeastern Conference (SEC) and several South Carolina college and university events and advancement staffs. Investigate the possibility of having a SEC focused events conference or teleconference.
- Assist the Advancement Division, Athletics/Gamecock Club and Sodexho with design and format of new suites and clubs at the Stadium for development purposes.
- Continue to serve as consultants to other campus departments and our sister campuses across the State.

Indicators:

Advancement’s transition team already has plans to meet and discuss how to best proceed and serve the University and the new presidential administration. The Special Events Web site is currently being revised and updated and meetings with the Millennium and UTS staff are set to try and streamline the dissemination of information. Visits with the USC-Aiken campus have already taken place. Visits to other campuses will be set.

Results/Use of Results:

During 2006-2007, the Office of Special Events was directly responsible for the management and implementation of over 140 events which had total attendance of approximately 17,000 guests. Approximately 60 of these events, with over 6,000 guests, took place at the President’s House.
Transition team meetings are underway. We have established a tentative events calendar for the coming academic year and are assisting with logistics of Presidential Search Committee.

Staff attended sessions on Webcasting/podcasting and investigating its benefit to future events.

Discussions and meetings with members of the Millennium support staff resulted in a new data reporting format which continues to be revised. Follow-up meetings will be scheduled to continue to investigate ways to revise data reports for maximum efficiency.

Advanced FileMaker Pro training sessions will take place over the summer with new employees. We are exploring new event and design templates.

Training of Room-Viewer diagramming software is also planned for the coming months.

The Special Events Web site has been vastly expanded to include planning checklists, general etiquette and protocol information as well as links to other University resources.

We are working with Sodexho on menu proposals and ideas which will be passed along to Athletics and Advancement, as well as the BOT Office and the President’s Office.

Staff met with representatives from the system campuses to discuss upcoming commencement logistics and campus events. Later this summer, visits are planned to the USC Lancaster campus, as well as to Clemson University.

**Initiative: 5 (j)**

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.
- Renovate Koger bedroom for increased comfort/utility of guests per new administration’s preferences.
- 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.
- Edit and update President’s House Web site and brochures as necessary.
- Continue cross-training with new Special Events Office staff.
- Continue annual inventory with Law Enforcement and Safety. Maintain copies of documentation at Office of Special Events and at LE&S offices.
Indicators:

The Special Events staff brings a combination of current University and historical knowledge, as well as knowledge of current trends and issues in the overall events profession to the new administration. Copies of the President’s House manual and digital inventory should assist with the transition as well.

Results/Use of Results:

In March, the Special Events staff met with Facilities Services to discuss timelines for President’s House projects. In early May, we had a follow-up “walk-through” meeting at the President’s House. Bids/quotes have been received.

Inventory review is 75% complete and on-file at Law Enforcement & Safety.

In March, a detailed summary which included photographs, a short history of rooms and furnishings and blueprints of various rooms was submitted to Development for transmittal to a prospective donor.

Initiative: 5 (k)

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 invitation to athletic events with the President, both at home and away; issue invitations and support such events.
• Investigate President hosting an annual 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 throughout the year.
• Utilize e-mail to survey donors.

Indicators:

Visual donor recognition policy established and regularly monitored.
Guests attending athletic events documented in Millennium.
Horseshoe Society event held if funding available.
Donor highlights submitted quarterly to Publications for the Carolinian as well as for consideration on the Web site.
Worked with Mass Communication and Publications and created timeline and cost analysis for producing flash videos.

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

Continuation of spring and fall letter from the President regarding new members.

Conducted donor survey for utilization in planning future activities and communications.

**Results/Use of Results:**

We have made significant progress in planning for the 2008-2009 implementation of the visual recognition program. Our campus committee has worked diligently with Robin E. Williams, Inc. consultants to develop and design a comprehensive, architecturally appropriate program to recognize gift naming opportunities included named spaces and the establishment of endowments.

During the 2008 football season, the level of donors invited to sit with the President in his Box and Bay was much more strategically planned. While the number of million dollar plus donors remained at eighteen (18), the 2007 season brought eleven (11) new names over the 2006 season. A total of eighty (80) donors were in attendance for 2007-2008 basketball games – eighteen (18) of which were million dollar plus donors.

Utilization of Publications and the University Web site to showcase individual donors is ongoing. We are currently working 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](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.

Donor Relations is working with Annual Giving to include Horseshoe Society members in flash-emails. The first in a series features students speaking about their experience at the University and should be released late May 2008. A second flash-email is scheduled for release in July.

New members and level changes in the Horseshoe Society (recognizes cumulative giving of $100,000 and more) are now recognized monthly.