

May 3, 2024  
University of North Carolina School of the Arts  
Winston-Salem, North Carolina

**COMMITTEE MEMBERS:**

\*Eric Flow  
\*Nia Franklin  
\*Rhoda Griffis  
\*Jerri Irby  
\*David Neill  
\*Kyle Petty, Advancement Committee Chair  
\*John Wigodsky  
\*Peter Juran (ex-officio)  
Tom Kenan  
*\*--Denotes voting members*

**COMMITTEE STAFF:**

Amanda Balwah, Associate Vice Chancellor for Institutional Integrity & Secretary of the University  
Kevin Bitterman, Executive Director, Thomas S. Kenan Institute for the Arts  
David Broughton, Foundation Board Liaison  
Jim DeCristo, Vice Chancellor for Economic Development & Chief of Staff  
Lissy Garrison, Vice Chancellor for Advancement  
David Harrison, Vice Chancellor for Institutional Integrity & General Counsel  
Matt Harris, Board of Visitors Liaison  
Kory Kelly, Vice Chancellor for Strategic Communications  
Cindy Liberty, Executive Director, UNCSA Foundation  
Rich Whittington, Associate Vice Chancellor for Advancement  
Tanya Dunlap, Executive Assistant to the VCA & AVCA  
Steve Cochrane, Staff Council Representative

**The Advancement Committee will not meet. The following materials are for informational purposes only.**

**OPEN SESSION MINUTES**

March 7, 2024  
SAAB 306  
10:45 a.m.

**COMMITTEE TRUSTEES PRESENT**

Eric Flow, Rhoda Griffis, Jerri Irby, Peter Juran, David Neill, Kyle Petty, John Wigodsky

**COMMITTEE TRUSTEES ABSENT**

Tom Kenan

**ADDITIONAL TRUSTEES PRESENT**

Jonah Bokaer, Nia Franklin

**COMMITTEE STAFF PRESENT**

Amanda Balwah, Kevin Bitterman, Tanya Dunlap, Lissy Garrison, David Harrison, Cindy Liberty, Kory Kelly, Rich Whittington

**OTHERS PRESENT**

John Bowhers, Marla Carpenter, Alyssa Cataldi, Sarah Cominsky, Kait Dorsky (*Faculty Council Rep.*), Patrice Goldman, Crystal Jester, Katherine Johnson, Sarah Kelly, Lynda Lotich, Provost Patrick Sims, Angela Tuttle, Rachel Williams, Shannon Wright

**CONVENE MEETING**

Committee Chair Kyle Petty convened the March 7, 2024, Advancement Committee Meeting at 10:45 a.m.

**CONFIRMATION OF QUORUM**

Kyle Petty confirmed the committee had reached a quorum.

**APPROVAL OF MINUTES**

Kyle Petty asked the committee members to review the minutes from the November 30, 2023 meeting. He then called for a motion to approve the minutes as presented.

**MOTION: David Neill moved to approve the minutes from the November 30, 2023, meeting and John Wigodsky seconded the motion. The minutes were unanimously approved.**

Kyle Petty introduced Vice Chancellor for Advancement, Lissy Garrison.

**ADVANCEMENT REPORT**

*Vice Chancellor for Advancement Lissy Garrison provided the Advancement Report.*

Vice Chancellor Garrison shared highlights and more reporting of stories to emphasize the data in the advancement report.

During our annual Strategic Planning Retreat, we worked together to refine the Advancement Strategic Framework and refocused our approach with only five areas. The new structure includes Fundraising, Pipeline, Alumni Engagement, Organization and People, and EDIB.

- Fundraising
  - So far this year, we have raised \$5.4 million, which is 50% of our total goal of \$10.8 million.
  - Current projections indicate that we should come close to hitting our total goal by the end of the fiscal year.
  - Looking good in the pipeline with Major and Principal gifts. Annual and Leadership Annual giving are trending slower than expected. Several initiatives to complete this year are in the queue; and we are conservatively estimating hitting 75% of goals in these areas.
  - Vice Chancellor Garrison talked about the importance of developing a larger pipeline of prospective donors for UNCSA, and she highlighted her team's new work identifying prospective donors across the country.
  - Question about Planned Giving - Pledged vs Realized, and whether it is counted at face value - Cindy explained the bequest is booked when it is first pledged and it hits the financial statement when it is realized.
  
- Leadership Annual & Family Giving

We continue to see exciting growth of the Planned Parent Giving program. Vice Chancellor Garrison shared highlights:

  - The parents of a new high school ballet junior expressed their joy for their son's experience at UNCSA by making a gift of \$11K to join the Parent Leadership Circle and the Drama Dean Circle.
  - A grandmother of a senior student at UNCSA made her first gift to UNCSA of \$1,000 and included a special note to express her happiness and gratitude of being "part of the Pickle Family at UNCSA."
  - We have relaunched the commemorative brick program. This information was shared with all current pickle parents, with the idea directed especially for graduating seniors. Early orders can make it in to have their brick in place in time for graduation. The bricks are placed in the brick path that travels throughout campus. The cost of each brick is \$500. Each purchase supports the UNCSA fund. This is very important because this is unrestricted funding.
  - Our annual **Scholarship Luncheon** was very successful again this year. A record attendance of 340 attendees. This event is attended by students, donors, faculty, and staff. Several donors expressed their gratitude for students joining the donors table for the luncheon and sharing stories of their experience as a student of UNCSA. This event is hosted by the Advancement Office.
  
- Days of Giving

Rich Whittington expressed the count down for "Days of Giving" on Wednesday, April 10, and Thursday, April 11, 2024.

  - Days of Giving will support UNCSA unrestricted funding and allow giving to other projects through the UNCSA for direct support. This continues the 48-hour Campaign tradition. Rich shared the story of long-term supporter Phyllis Dunning received a call during this campaign many years ago. Phyllis honored the call, giving a donation then, and as an avid supporter of UNCSA she continues to make donations today.
  - New this year – you can direct your donations to general scholarships in all the arts conservatories and/or to the UNCSA general scholarship.
  - The alumni office has launched the first Instagram page for the UNCSA Alumni with over 700 followers and counting. If you follow this page on Instagram, you can get involved in the design of this year's "Pickle Sock," which is given to everyone who donates \$100 or more to the UNCSA Fund during Days of Giving, and to all challenge donors.

- Shannon Wright shared details regarding challenge donor gifts. These gifts played a very important role during the 2023 Days of Giving, with over \$70K in challenge funds. This year, the request is for each challenge gift donor to give \$1000 or more. We are hoping that everyone who gave last year will plan to give this year and we would like to see many new challenge donors. Additional details can be found on the “Days of Giving” web page or contact Shannon Wright to make your gift.
- Over the past few years, the Foundation Board has always reached 100% participation in Days of Giving. Last year, the Foundation Advancement Committee made a commitment for 100% participation in challenge gifts. Shannon has challenged each member of the BOT to be a challenge donor.
- **Alumni Engagement**

Vice Chancellor Garrison introduced the new Director of Alumni Engagement, Rebecca Burkeen. Rebecca has over 14 years of experience running alumni programs in university settings.

  - Alumni Engagement is launching a new online community, a new alumni presence on Instagram, and a series of informal alumni gatherings across the country titled “Pickles and Pints,” a way for alumni to connect with each other.
  - The new launch will give access to several exciting platforms for class notes, endorsing our alumni owned businesses, job postings for those businesses looking for employees, access to register for events, and UNCSA Connect.
  - We are also developing regional strategies and looking for regional ambassadors.
    - We’ve held Virtual Town Halls for all 5 of the art schools.
    - We continue to host “Pickles and Pints” events. Pickles and Pints is a branded regional event held in different cities and states, including Atlanta, Durham, Chicago, LA, and Orlando. Later this year this event will be held in New York, Boston, and Washington, DC. This is a great opportunity to establish personal connections with our alumni.
- **Pipeline Development**
  - We continue to focus on expanding our pool of donors.
  - Key to this has been structuring a new Prospect Development Team that:
    - Develops regional strategies that align with the portfolios and identify prospective donors across the country.
    - Develops travel strategies to make connections with alumni and donors outside of the local triad area.
  - The success of this new strategy has made it necessary to reexamine staffing plans; to meet the need to identify the new prospective donors by meeting and qualifying this larger pool of donors.
- **Campaign**

Vice Chancellor Garrison shared an overview of comprehensive campaigns and expressed why “Big Ideas” are so important to any successful campaign.

  - During this year, we are in the phase of developing best practices, establishing the framework, and developing working goals.
  - At the start of January 2025, we will begin to conduct our feasibility study.

*Foundation Executive Director Cindy Liberty provided the Foundation Report*

### **UNCSA FOUNDATION REPORT**

- The Foundation Board has the record of leading in donations for The Days of Giving. The Foundation Advancement Committee Board committed to 100% participation and included challenge matches.
- The Finance Committee met in February to review the second quarter results.
- The Executive Committee met to work on policy updates for the foundation. Policies last updated in 2016.
- UNCSA purchased the property at 1411 S. Main Street. It is now vacant. The former tenant remained until the end of December 2023 and decided to leave the property for other opportunities. We will have discussions to decide the best use for the property; whether to release the property or for UNCSA to move into the building.
- The Foundation Board is looking at setting priorities for FY 2024-25. The leading priority is the campaign with several others to consider.
- The Semans Art Fund Board accepted applications for student projects. The Deans are reviewing for selections to be considered and the board meets on April 8 to review and determine awards. The awards will be announced on April 15.

*Vice Chancellor for Strategic Communications Kory P. Kelly was introduced to the Board of Trustees*

### **STRATEGIC COMMUNICATIONS REPORT**

We welcome our new Vice Chancellor for Strategic Communications, Kory P. Kelly. Kory introduced himself to the Board of Trustees; sharing his excitement and appreciation to join UNCSA.

- Committee Chair Kyle Petty expressed a special thank you to Katherine Johnson for serving as Interim Vice Chancellor.
- Congratulations for a nearly sold-out performance of the 'Nutmacker' in its debut at the Tanger Center, which surpassed the expectation of ticket and revenue records.

*Executive Director for the Thomas S. Kenan Institute for the Arts Kevin Bitterman provided the TSKIA report*

### **THOMAS S. KENAN INSTITUTE FOR THE ARTS (TSKIA) REPORT**

Kevin presented an update of recent projects and sponsored activities as the Kenan Institute moves from the strategy development phase of the planning process to project and program development.

- On February 15-18, 2024, the TSKIA and UNCSA hosted "Haven," a local rendition of the renowned Black Sacred Music Symposium, a biennial event at the University of Illinois Urbana-Champaign under the leadership of soprano and choral conductor Dr. Ollie Watts Davis.
- Through the Deans' Innovative Projects Fund, TSKIA provided support for the production process to pilot Holiday Suite: Home for the Holidays in December 2023, comprising multiple live performances, multi-media installations, and immersive performance experiences on the UNCSA campus. Alumna Dwana Smallwood returned to UNCSA to develop choreography in celebration of Kwanzaa as part of the event.

- The Hatch project led by Dance Professor Taryn Griggs is a choreographic incubator connecting UNCSCA contemporary dance seniors with UNCSCA dance alumni actively working in NYC and beyond. From April 29-May 5, 2024, four alumni choreographers—Dominica Greene (Dance '16), Ayo Jackson (Dance '99, 2022 Artpreneur Alumni of the Year), Adrienne Westwood (Dance '03), and Ian Spencer Bell (Dance '96)—will create four original small group works with the students at La MaMa's studios in NYC.
- The Kenan Institute seeks to formalize professional industry partnerships for each division at UNCSCA with plans to create 2-3 new affiliations by 2025.
- The Winston-Salem site team for the national Arts for EveryBody initiative, which includes the Kenan Institute for the Arts, has launched a series of public arts and wellness community engagement events centering on the Happy Hill, Cleveland Avenue, and Boston-Thurmond neighborhoods. Local artist Ernel Martinez will facilitate a community-engaged artmaking around a large-scale mural on a water tank at 15th and Liberty Streets.
- The Kenan Institute is supporting a partnership with the UNCSCA Division of Liberal Arts and East Carolina University's Coastal Studies Institute to pilot See/A/Change, a year-long fellowship for undergraduate students to create and collaborate as part of an interdisciplinary artistic team.
- With an interest in developing community-based work in partnership with UNCSCA, the Kenan Institute recently hosted a site visit by representatives from Los Angeles based Cornerstone Theater Company to discuss hosting their national respected Institute Summer Residency in Winston-Salem in 2025.
- A partnership with United States Artists (USA) supports fellowships for individual artists in the Southeast and those working in the disciplines taught at UNCSCA. The recently announced 2024 United States Artist Fellows sponsored by TSKIA are Corey Alston, a 5th generation traditional sweetgrass basket weaver from the Gullah-Geechee tradition, and Jerod Impichchaachaaha' Tate, a classical composer and citizen of the Chickasaw Nation.

### **OTHER BUSINESS**

Committee Chair Kyle Petty asked if there was any other business for the group. There were no further comments.

### **ADJOURN**

Kyle Petty asked for a motion to adjourn at 12:10 p.m.

**MOTION: Peter Juran made a motion. David Neill seconded. The meeting was adjourned at 12:10 p.m.**

**ADVANCEMENT REPORT**

**Vice Chancellor for Advancement**

At our annual Advancement strategic planning retreat in February, based on progress made over the past two years, we consolidated three of our previous eight pillars (events, stewardship, and philanthropic priorities), resulting in five pillars overall. We will continue to report progress to date in the context of our Advancement strategic framework, which includes the following:

- Core areas of Advancement – Fundraising; Pipeline development; Alumni Engagement
- Infrastructural areas – Organization and People; EDIB

We look forward to reporting the outcome of our planning retreat and FY24 priorities at the spring meeting.

**Fundraising**

**Year-to-date July 1, 2023 – April 15, 2024**

**79% of year complete**

	Goal	YTD	%	# Gifts	Pipeline	Projected Total	%
<b>Principal Gifts</b> \$1M+	\$6,400,000	\$1,880,000	29%	1	\$1,875,000	<b>\$3,755,000</b>	<b>59%</b>
<b>Major Gifts</b> \$25K - \$999K	\$3,100,000	\$2,883,526	93%	28	\$2,083,050	<b>\$4,966,576</b>	<b>160%</b>
<b>LAG</b> \$1K - \$24,999	\$1,000,000	\$1,098,016	110%	304	\$75,000	<b>\$1,173,016</b>	<b>117%</b>
<b>Annual</b> <\$1K	\$315,000	\$218,474	69%	2,385	\$45,000	<b>\$263,474</b>	<b>84%</b>
<b>TOTAL</b>	<b>\$10,815,000</b>	<b>\$6,080,016</b>	<b>56%</b>	<b>2,718</b>	<b>\$4,078,050</b>	<b>\$10,158,066</b>	<b>94%</b>

- Most exciting recent news is our record-breaking success with this year’s Days of Giving! Please see the section below for details.
- We have raised nearly \$6.1M so far this fiscal year, or 56% of our goal of \$10.8M. With 79% of the year completed, this is a bit behind pace.
- The biggest risk to this number is in our projected Principal Gifts category. There are several principal level gifts in the works that, if finalized, will lead to exceeding our overall goal.
- One of our biggest goals over the past two years has been to build strength in the Major Gifts category. We have already nearly met this year’s Major Gifts goal, and with a robust pipeline of gifts expected to close this fiscal year, we are on target to far surpass goal. This is especially impressive, considering that we are currently down to only one dedicated major gifts fundraiser. In addition, our pipeline for major gifts going into next fiscal year looks stronger than it has at this point in previous years, meaning we should be starting the year in a good place.
- We are very excited about this year’s success in Leadership Annual Giving – as of April 15, we have already raised 110% of our total annual goal. This great success has been due to exceptional work with parents and families, our Giannini Society and Deans Circles, and Days of



Giving sponsorships. In light of the rapid growth in this important gift category, we are actively recruiting for a second Leadership Annual Giving position.

- With these projections in mind, we currently project total FY24 fundraising at approximately \$10.1M, or 94% of goal. We are actively working to boost the pipeline at every giving level, but our success in meeting the goal will be especially influenced by whether we are able to close the Principal Gifts that are in the works.

## **Leadership Annual & Family Giving**

### **DAYS OF GIVING**

- **Held April 10-11, this year's Days of Giving was our most successful ever!**
- **Dollars Raised: \$301,714**
  - Goal: \$275,000
  - FY23 Actual: \$257,061
  - 17% increase over LY
- **Total Gifts: 974**
  - Goal: 1000
  - FY23 Actual: 747
  - 30% increase over LY
- **Challenge Gifts Raised: \$125,106**
  - Goal: \$100,000
  - FY23 Actual: \$70,000
  - 79% increase over LY
- **New Components for FY24:**
  - **On Campus Presence**
    - Increased signage
    - Two day on-campus presence Daniels Plaza/Hanes Student Commons
  - **Student Involvement**
    - Student focused activities on campus
    - Student challenges (Pickle Prowl & Student Participation)
    - SGA & Student Affairs collaboration
  - **Participation Challenges**
    - Increased focus on advance challenge gifts
    - Participation challenges focused on targeted segments
  - **Campus Leadership and Board Participation**
    - Increase focus on advanced awareness and importance of participation across all boards and campus leadership
  - **Increased Social Media and PR**
    - Increased funding for paid social media, partnership with StratComm, and more engagement from campus partners
    - Key PR stories from StratComm
- **Participation Highlights:**
  - Parents/Grandparents ranked top in participation with 188 gifts followed closely by Faculty/Staff at 187
  - Friends ranked top in donations with \$99,791 in total gifts, followed by Board Members at \$83,755
  - Board Participation
    - Board of Trustees: 83%
    - Foundation Board: 100%



- Campus Leadership
  - Executive Team: 100%
  - Administrative Cabinet: 89%
  - Dean's Council: 88%

## PARENT & FAMILY GIVING

- **Parent Leadership Circle (PLC)**
  - 5 Current Families
    - 3 HS Families (2 Dance, 1 Drama)
    - 2 UG Families (D&P)
    - 2 alumni families rolled off at end of 2023 (HS Drama, UG Drama)
  - **Key PLC Impact: Uwill Telehealth Platform**  
 Shannon Wright, Laurel Donley, and Stephanie Cartwright will be presenting *Leveraging Partnerships – Innovative Approaches to Campus Mental Health Support* at the UNC System Behavioral Health Convening in Chapel Hill on May 14-15, focusing on the collaborative relationships across campus to fund our new Uwill telehealth platform.
- **FY24 All Parent Giving (including any constituent coded as a Parent or Grandparent of a current student and/or alumni) – Numbers through February/not including Days of Giving**
  - 355 total donors YTD (vs. FY23 total year of 561 total donors)
  - \$370,000 dollars raised YTD (vs. FY23 total year of \$350,000 dollars raised)
  - \$998 average HH gift YTD (vs. FY23 total year \$529 average HH gift)
  - 39 different funds supported (Top funds: John Nelson Endowed Scholarship, Giannini Society/UNCSA Fund, and Film Discretionary)
  - Giving Society Membership (individuals, not HH)
  - Giving Society Memberships (individuals, not HH)
  - 6 Chancellor's Circle (+2 vs. FY23)
  - 12 Encore Circle (+3 vs. FY23)
  - 21 Dean's Circle (+4 vs. FY23)
  - 42 Giannini Society (+3 vs. FY23)
  - 10 Parent Leadership Circle (+2 vs. FY23)
- **FY24 Current Parents (including any constituent coded as a Parent or Grandparent of a current student only)**
  - 212 total donors YTD (vs. FY23 total year of 238 total donors)
  - \$116,000 dollars raised YTD (vs. FY23 total year of \$81,000 dollars raised)
  - \$618 average HH gift YTD (vs. FY23 total year \$292 average HH gift)
  - 22 different funds supported (Top 3 funds: Parent Leadership Circle/Chancellor's Innovation Fund, Giannini Society/UNCSA Fund, Artsbound)
  - Giving Society Memberships (individuals, not HH)
  - 2 Chancellor's Circle
  - 11 Dean's Circle (+3 vs. FY23)
  - 16 Giannini Society (+1 vs. FY23)
  - 10 Parent Leadership Circle (+4 vs. FY23)
  - 2 Encore Circle (+2 vs. FY23)

### **Giannini Society**

Giannini members commit leadership annual gifts of \$2,400 or more (or \$200/month) to the UNCSA Fund. Alumni Giannini Society members commit \$1,200 or more (or \$100/month) to the UNCSA Fund.

- **142 HH Memberships**
- **\$333,619 dollars raised YTD** (108% of FY24 goal through mid-April)
- **New Member Welcome Mailer:** New Giannini members will receive a similar branded keychain mailer with edited language welcoming them to the Giannini Society. These will be mailed monthly to new member households.

### **Dean's Circles**

Advancement recently completed quarterly meetings with each of our Deans (Arts Schools, DLA, High School, Student Affairs, Academic Affairs, and the Library). Conversations are ongoing with each department to further cultivate new Dean's Circle prospects as well as to further engage current members throughout the year. Each Dean was encouraged to send a personal email to their Dean's Circles mid semester to highlight the first half of the semester, promote what's to come, and invite members to participate in Days of Giving. Actively working with Dean's to promote smaller engagement opportunities throughout the year (e.g., attending rehearsals, classes, smaller performance opportunities, etc.) to further engage these donors.

### **Pipeline Development**

- Building on the incredible work of our recently created Prospect Development Team (PDT), our strategic planning process identified the following priorities to expand the base of support for UNCSA in FY25:
  - Priority 1 – Refine Processes: Continue to document and refine all advancement processes including contact reports, gift documentation and processing, and prospect identification.
  - Priority 2 – Qualifications & Referrals: Qualifications will be a top priority for FY25 and will focus on all levels of giving: annual, leadership annual, major & principal gifts. There will also be targeted strategies for Parent and Alumni "sprints". In addition, creating a seamless referral process for new donor prospects will be further developed and refined.
  - Priority 3 – Collaboration: Particular emphasis will be placed on our deepening collaborations with campus leadership, the Kenan Institute for the Arts, faculty and alumni.

### **Alumni Engagement**

- Regional alumni networking meetups, "**Pickles & Pints**," continued this spring with a record number 63 guests in New York City, and a small but mighty 12 guests in Boston. Upcoming events will be held in Washington, D.C. and Lititz, PA in April, and Raleigh in May, with additional receptions for alumni to engage with students in NYC after the Drama Showcase and in Los Angeles for REELTalks.
- The alumni office sent an engagement survey via social media and the alumni newsletter with questions about how alumni prefer their communications, the types of events they'd like to attend, specific programming preferences for Homecoming, and ways alumni would like to stay connected with campus. Those results will help guide programming for the upcoming year. Some highlights of the survey include:
  - The majority of alumni surveyed prefer in-person events.
  - The type of event most alumni seek are either purely social or networking.
  - The two most popular events people would like to see at Homecoming are reunions and attending UNCSA performances.
  - The number one form of communication preferred by alumni is email with social media coming in 2<sup>nd</sup> place.

- We continue to see great engagement with UNCSCA Connects as alumni are finding meaningful ways to connect with students. During the Boston Pickles & Pints event, 2020 Directing alumnus Cameron McCormack explained that since he did not have this resource as a student, it gives him great pleasure to help students in this way and he takes it a step further by offering to meet with people in person when they visit Boston. Two students have already taken him up on this offer. Our alumni are amazing!
- Homecoming weekend is scheduled for October 17-20, 2024, and we are starting a tradition of celebrating milestone reunion years during this time. In addition to the positive feedback we have received from the classes of 2019 (5-year reunion), 1984 (40-year reunion) and Golden Pickles (50 years out or more), we have also been contacted by other groups who would like to reunite this fall.
- **COMING SOON:**
  - The AlmaBase alumni platform is scheduled to launch on May 2, 2024, and will provide an online community where alums can update their profiles, search alumni directories, submit class notes, join or search the alumni-owned business directory, look for and post job opportunities, sign up for volunteering, and register for alumni engagement events.
  - This summer the “Alumni HQ” will be open for business on campus, across the way from the Pickle Pantry, and very close to the new Student Government Association’s offices. The alumni team looks forward to daily access for visitors and monthly open house events for students, faculty/staff and alumni.

## Events

### Recent Events:

- **Spring Leadership Dinner**, Friday, March 1 – Dinner and performance for BOT, BOV, Foundation Board, and annual donors Gianni level and up
  - **Target attendance: 80**
  - **85** registered
  - **86** attended: **67** board members/donors, **19** internal
 Guest Feedback:  
 Favorite moments:
  - Meeting new supporters and hearing from alumni and other dance choreographers.
  - Hearing the back story from the composer and choreographers... very much enhanced my enjoyment of the dance program that followed.
- Room for improvement:
  - Parking on circle should be well-marked for handicapped WITH state-issued hang tags showing—the sandwich board “special needs” sign conveniently opens the parking area to anyone.
- **Chancellor’s Circle Dinner**, Wednesday, March 20 – Annual dinner for donors of \$25,000+
  - **Target attendance: 50**
  - **64** registered, **60** attended: 20 donors, 20 fac/staff, 20 student participants
  - **84** invited, **20** attended, **24%** of total Chancellor’s Circle
- Guest feedback:
  - Favorite moments:
    - Wonderful evening showcasing what UNCSCA is all about.
    - Having students sit at table during dinner so that we could interact with them.
    - Connecting with people I do not see so often.
  - Room for improvement:
    - I was disappointed that there were not more people attending this fun event.

### **Upcoming Events:**

- **Spring Dance Opening Reception**, Thursday, April 25
  - Reception and performance for BOT, BOV, Foundation Board, and annual donors Giannini level and up
- **Associates End of Year Reception**, Thursday, May 9
  - Reception for volunteers
- **Encore Circle Luncheon**, Wednesday, May 15
  - Lunch for Planned Giving circle members

### **Organization and People**

- **Director of Events** – John Bowhers will be leaving his position with UNCSA and headed to a new adventure. He announced his last day is May 1, 2024.
- John joined UNCSA as a part-time temporary Special Events Coordinator in September 2020. In September 2021, he was announced as the full-time Events Manager. Throughout his time with the advancement office, he has worked tirelessly to produce high-quality, high impact events to move our strategic goals forward. His energy and enthusiasm for our work and for UNCSA in general is contagious; and we are so appreciative of everything he has done to make each event successful for UNCSA.
- **Upcoming Searches**
  - Leadership Annual Giving Officer
  - Annual Giving and Program Manager
  - Director of Development
  - Special Events Manager

### **Next Campaign**

- Our next comprehensive campaign will launch in FY27.
- We are in the final six months of a two-year period of infrastructure building and best practice implementation that will lay the foundation for campaign success.
- Advancement and Foundation teams are now working to determine preliminary high-level campaign goals, create various scenarios for campaign pyramids, refine the campaign timeline, and investigate options for campaign consultants.
- Deans, vice provosts, and other campus leaders have been engaged in conversations about “big ideas” that can lead to philanthropic priorities for the campaign. Some of these ideas will be developed using a white paper approach, which can then be integrated into the feasibility study phase pre-campaign launch.
- Scholarships continue to be a top philanthropic priority for UNCSA, and we are working together with Strategic Communications, Student Recruitment, Financial Aid, and the UNCSA Foundation to develop a cohesive best-practice strategy for scholarship structure, communications, and stewardship. We are also exploring possible “big ideas” involving scholarships that might be incorporated into our campaign.
- The renovation and naming of the Stevens Center has provided several opportunities for principal gift conversations and will continue to be one of our important philanthropic priorities.
- Next year, we will focus on campaign planning and the development of the case for support and philanthropic priorities, with the following year launching our quiet lead gift solicitation phase. Knowing that we expect to set an aspiration goal for this campaign, we now expect that the quiet phase will last up to 24 months.

## **UNCSA FOUNDATION BOARD REPORT**

### **Finance Committee**

- Meets on April 23<sup>rd</sup> to review 3<sup>rd</sup> quarter results and the first draft of FY 25 budget.
- Days of Giving was on April 10-11 and we expect to have great results from this to help make up the difference in unrestricted funds.

### **Executive Committee**

- Foundation has transitioned from Truist to First Bank
- Meets on May 23<sup>rd</sup>
- Discussed 4 major projects and priorities for budget planning

### **Advancement Committee**

- **The Queen reigns supreme!!!**
- **100% Foundation Board Member participation for Days of Giving**
- **UNCSA Foundation Board has been the leading board for 8 years in a row; both in participation and dollar amount.**

### **Special Projects**

- Engaged McKissick Architects to draw up design plans for 1411 S. Main Street

### **Foundation Board**

- March 21<sup>st</sup> meeting – Updated Foundation Policy book was approved with the exception of the Real Estate Policy (Chapter 23) that needs more review.
- Reviewed the funds that were subject to the new Endowment Reinvestment Policy and how the spending of those funds has progressed.

### **Semans Art Fund Board**

- Monday, April 8, 2024 – Semans Art Fund Board Meeting
- Discussed possible extension of projects to include collaborations between schools
- Awarded \$140,000 in student projects.
- Took suggestions from the deans regarding improvement to the process.

## **STRATEGIC COMMUNICATIONS REPORT**

Strategic Communications continues to push forward with a tremendous amount of public relations and marketing activities in promotion of the many winter/spring performances and concerts, institutional announcements, and recruitment. Highlights include:

- *The Hollywood Reporter* ranking in the Costume Program in the Top 10 for the seventh consecutive year.
- Announcement of the vendors for Phase II of the Stevens Center Project
- Organizing the communication plan for the new Drama Dean
- Announcement of the multiyear partnership with Dance Theatre of Harlem including the presentation of *Firebird* at Spring Dance
- Support for the Board of Governors Meeting in mid-April including full signage, video and promotional support for the event.

As the new VC of Strategic Communications Kory Kelly has learned more about the department and UNCSA in general, he has seen opportunities for growth and change, and will continue to work with the Strategic Communications Team and the Executive Leadership Team to prioritize them. These

opportunities are mainly in the areas of recruitment marketing, retention marketing and industry positioning and leadership. More information on this will be shared in the coming months.

## RANKINGS

- Feb: The Hollywood Reporter Top 10 Costume Design Programs
- April: Backstage 30 of the best film schools in America
- April 24: Variety Entertainment Education Report (School of Filmmaking) - pending

## PUBLIC RELATIONS

### Press Release/Media Coverage Highlights:

- [Dance Theatre of Harlem and UNCSCA forge multiyear partnership](#) (coverage pending in News & Observer, WFDD, and others)
- [UNCSCA selects Jenkins Peer Architects and Steinberg Hart as design team for Phase 2 of Stevens Center renovation](#) (Coverage: Triad Business Journal, front page of WS Journal, WS Today, Informed Infrastructure)
- [Three UNCSCA students from North Carolina selected for Carnegie Hall's National Youth Orchestra](#) (Coverage: WS Today, WFDD, WUNC)
- [UNCSCA commemorates 60th anniversary of "Dial for Dollars" campaign](#) (WFDD)
- [School of Music alumna wins Grammy Award](#) (Coverage: WFMY-TV News 2, WGHP Fox 8, WRAL)
- [Three UNCSCA students named semifinalists for Fulbright fellowships](#) (Coverage: Yes! Weekly)
- [UNCSCA offers intensives to day camps in Dance, Drama, Filmmaking, Music, Visual Arts and more this summer](#) (Coverage: Broadway World, WSJS Radio)
- [UNCSCA presents spring edition of its Chamber Music Festival celebrating the 20th anniversary of Watson Hall](#) (Coverage: WXII News 12, WS Today, WFMY News 2)

### Additional Media Coverage Highlights:

- **Leadership and faculty:**
  - [The Violin Channel](#), [The Strad](#), [Broadway World](#): Coverage of Music faculty member **Paul Sharpe** receiving BOG Excellence in Teaching Award
  - [WFDD](#): **Mike Wakeford** and **Phyllis Dunning** interviewed about the 60th anniversary of "Dial for Dollars" in conjunction with Days of Giving
  - [WXII-TV News 12](#): Chief of Staff and Vice Chancellor for Economic Development **Jim DeCristo** about the Stevens Center renovation and how it's impacting the UNCSCA performance season.
  - [WFMY-TV News 2](#): Alumnus and Music faculty member **Dmitri Vorobiev** discusses the Chamber Music Festival.
  - [The Hollywood Reporter](#): **Bill Brewer**, co-director of costume design & technology discusses how the school evolves to attract out-of-state students.

## MARKETING

### Recruitment:

- In February and March, recruitment marketing efforts for each conservatory experienced a noticeable rebound in leads after the expected slowdown in early January. Furthermore, the marketing budget was reallocated to better support efforts to increase leads during the final push for students that occurs in February and March. Despite the overall positive trend, the music school and drama school continue to lag behind in attracting leads. Currently, digital and social ad campaigns are in the crucial phase of being restructured and optimized for maximum impact. Despite the overall positive trend, the music school and drama school continue to lag behind in attracting leads.



- Recruitment Marketing Leads: During February through March 29, paid marketing generated over 750 leads across all schools, a decrease of 36 % YOY. However, 2023 saw increased spends compared to previous years. In 2022, leads for the same time period amounted to only 229. This clearly shows the benefit of additional resources for digital marketing.
- We are currently working with a digital agency to audit our online marketing activities to ensure proper budget allocation and activities. More will be reported on this at future meetings.

#### Performance:

- As we near the conclusion of our 2023-24 performance season, we are actively assessing our achievements and progress. We are in the process of compiling statistics to provide a comprehensive overview of our season's success.
- Looking forward, preparations for our next season are underway. We have crafted a detailed timeline for disseminating information, which has been shared with Deans for their input. Additionally, we are conducting a thorough review of our ticket pricing policy to ensure alignment with fair market value, while also evaluating our complimentary ticket distribution procedures.
- An exciting development for this year includes the creation and distribution of a comprehensive season brochure to coincide with the announcement of our upcoming season lineup. This initiative aims to enhance communication and engagement with our audience.
- Furthermore, we are exploring pre-sale opportunities to foster stronger relationships with our donors and key stakeholders, leveraging these early access opportunities as a means of appreciation and engagement.

#### DIGITAL MEDIA

Since the last Board of Trustees meeting, Strategic Communications has published 27 features, press releases and videos — supporting 43,212 pageviews and 27,428 user visits in the news and features section of uncsa.edu.

#### Feature Highlights:

- **Make Your Mark/EDIB:** [Diverse dances, dynamic stories: UNCSCA's Winter Dance celebrates inclusivity](#)
- **Thought Leadership:** [UNCSCA expert shares why Taylor Swift, BTS and more had their music taken off TikTok](#)
- **Thought Leadership:** [A journey in theater: Director Quin Gordon's top 10 most memorable performances](#)
- **Sharpen Your Craft:** [UNCSCA dance film 'The Way Back' explores the profound journey of reconnection](#)
- **Industry Relevance:** [UNCSCA connections to the 2024 Super Bowl](#)
- **Faculty Profile:** [Painting dreams: Susan Crabtree's pivotal role in Scenic Art education](#)
- **Faculty Profile:** [The trailblazing journey of percussionist Ksenija Komljenović](#)

**Website Visitors:** From Jan. 18-March 29, 2024, uncsa.edu had **204.1K users (+5.2% MOM)** visit the site.

#### Site Acquisition by Channel:

- 212k users (**+10.8% MOM**) from **organic search**.
  - This is a result of our continued emphasis on SEO feature pieces, which are meant to produce more visibility of UNCSCA in the Google search results.
- 11.5k users (**+20.6% MOM**) from **organic social**.

#### UNCSCA Campus (Pathify)

- Since the last board meeting in 2023, there have been **4.9k sessions** and **313 unique sessions** in the UNCSCA Campus app.



- Since its initial launch for students in August 2023, there have been **19.7k sessions** and **882 unique sessions** in the UNCSA Campus app.

### **INTERNAL COMMUNICATIONS**

#### **Select campus messages from Chancellor Cole**

- 02/14/24: [Sharing the passing of an emeritus faculty member](#) (Eric Larsen)  
02/25/24: [Take 5 to Thrive](#) (Health & Wellness campaign)  
03/04/24: [Updates from the UNC Board of Governors](#)  
03/28/24: [Design team selected for Stevens Center renovation](#)  
4/9/24: [Dance Theatre of Harlem and UNCSA forge multiyear partnership](#)

### **ADDITIONAL CAMPAIGNS**

- Days of Giving: Our annual Days of Giving campaign featured a multifaceted approach to engage our community. This year, we have implemented comprehensive campus and digital signage, alongside a paid digital and radio advertising campaign. This collaborative effort marks a significant milestone in our partnership with the Office of Advancement.
- Board of Governors Visit: Collaborating closely with the Chancellor's office, we have developed an extensive creative suite to enhance the upcoming Board of Governors visit. This includes informative folders, campus and digital signage, as well as a suite of banners, ensuring a cohesive and impactful presentation.
- Take 5 Campaign: Our commitment to promoting health and wellness on campus continues with the ongoing development and execution of the university's Take 5 campaign, aimed at improving our community's mental health and overall wellness.

### **LOOKING FORWARD**

- Strategic Communications priorities for the coming quarter include:
  - Creation of the commencement program book and leverage media related to the speaker.
  - Announcement of the 2024-2025 performance season
  - Marketing/PR support for UNCSA media project launches
  - Upcoming rankings include *The Hollywood Reporter* drama programs in June and Film programs in August, and *Moviemaker* film ranking in July.
  - Strategize the support needed for the health and wellness initiative *Take 5!* in order to relaunch a more integrated campaign beginning with orientation.
  - Begin creating a holistic campaign for the recruitment marketing plan.
  - Continued evaluation of the staff structure and systems in place in order to efficiently support the communications needs of the University.
  - Establish cross-campus teams to support the development of the brand promise and integrated positioning efforts.

### **THOMAS S. KENAN INSTITUTE FOR THE ARTS**

In this report you will find a list of programmatic partnerships, projects, and sponsored activities that have emerged and are aligned with the Kenan Institute for the Arts' strategic framework. As we conclude year one of program ideation and strategy development, we believe that there has never been a greater opportunity for the Kenan Institute to serve as an incubator and accelerator for new ideas and creative partnerships to shape the future of the arts at UNCSA, and beyond.

#### **Kenan Strategy 1: Focus TSKIA's future work at UNCSA on creating transformational experiences for faculty, students, and alumni.**

- UNCSA and the Kenan Institute for the Arts have launched a multi-year partnership in collaboration with the New York City-based Dance Theatre of Harlem (DTH). Central to this partnership are mutually beneficial goals to elevate educational and professional opportunities for student artists, provide opportunities to revitalize iconic works from the DTH canon, and co-curate new works and creative projects in partnership with UNCSA.
- The Kenan Institute recently partnered with Full Frame Documentary Film Festival to sponsor the 26th season and return of the festival after a five-year hiatus and by supporting a delegation of seven UNCSA School of Filmmaking students to experience the festival, engage in panel discussions, and attend master classes with legendary filmmakers.
- School of Music Professor Allison Gagnon recently presented at the 36th Global Conference of Alzheimer's Disease International in Kraków, Poland. The presentation described the Music Between Us program through UNCSA's ArtistCorps and included a presentation of the Program Guide which was published in 2022 with previous support from TSKIA. Music Between Us was conceived and developed by Professor Gagnon to mobilize music students in service with those living with dementia.
- This summer, the Kenan Institute for the Arts will collaborate again with La MaMa Umbria International by sponsoring up to four UNCSA Alumni for one of three creative symposiums in Italy designed for artists to work with internationally renowned theatre professionals whose work is impacting the contemporary landscape of performative arts. The opportunity is open to UNCSA alumni from undergraduate and graduate degree programs – specifically those whose creative process reflects a commitment to directing and writing for the stage, which may include movement-based process, screenwriting, and other forms of devised performance. During the two-week sessions, alumni will take workshops with distinguished artists, visit Spoleto, and other Umbrian cultural sites.
- Also, this summer, the Kenan Institute is engaging with the Penland School of Craft to pilot a round of no-cost workshop residencies for UNCSA faculty who have creative practices in the visual arts to continue developing their own creative practices outside of the classroom.

#### **Kenan Strategy 2: Cultivate deeper creative connections among TSKIA, UNCSA, and regional communities.**

- Building upon the Kenan Institute's history and commitment to developing community-based work in partnership with UNCSA, the Kenan Institute is working with Los-Angeles based Cornerstone Theater Company about hosting their nationally respected Institute Summer Residency in 2025 which will introduce their community-engaged artistic approach to storytelling leading up to the production of a new play centered on local stories. To date, Kenan Institute Executive Director Kevin Bitterman and Business Manager Liza Vest, along with UNCSA Professors Andy Paris (Drama), Cliff Odle (Drama), Mike Wakeford (DLA), and Nikki Hyde (D&P) have participated in pre-planning activities, which will continue this spring.

#### **Kenan Strategy 3: Center TSKIA's programs on illuminating ways that artmaking undergoes continuous change and contributes to social transformation.**

- TSKIA is partnering with Dance/USA, the national service organization for dance, by sponsoring its Centering the Artist Webinar Series, moderated by NYC-based dance artist Donna Uchizono. This 3-part virtual series brings together artists from diverse backgrounds to share and reflect on how their identities are embedded in their work, and how perceptions of those identities have affected their careers and their artistic expression. The webinars support the entire dance community by helping to strengthen artists' acumen to build a career & pursue creative collaborations with organizations and peers – UNCSA faculty, students, and alumni will be able to participate without charge.

**Kenan Strategy 4: Invest in TSKIA's capacity to develop, deliver, communicate, evaluate, and refine programs.**

- Building upon our recent strategic planning process, the Kenan Institute has been working with Big Duck Studio, a national communications firm, to establish a new brand architecture strategy, including a new visual identity and messaging platforms for organizational messaging and refinement of vision, mission, and values statements. We are now working with focus groups composed of UNCSA administration, faculty, alumni, and Kenan Institute staff in collaborative group sessions focused on logo/tagline and messaging to support future programs, services, and partnerships.