



Association of Advancement
Services Professionals
Fueling nonprofits. Advancing careers.

NOVEMBER 14-16, 2018

**NAVIGATING CHANGE
THROUGH BEST PRACTICES**

CHICAGO, ILLINOIS
THE HILTON CHICAGO

**The Art and Science
of
Naming Opportunities**

SUMMIT 2018

Presenter

Sarah Thomas

Director of Donor Services
NC State



<https://www.linkedin.com/in/sarahreyannathomaswilliams>
srthoma3@ncsu.edu

SUMMIT 2018

aasp Association of Advancement
Services Professionals
Fueling nonprofits. Advancing careers.

NOVEMBER 14-16, 2018

**NAVIGATING CHANGE
THROUGH BEST PRACTICES**

CHICAGO, ILLINOIS
THE HILTON CHICAGO

Presenter

Kathy Kennel

Executive Director

NC Agricultural Foundation and NC Tobacco Foundation

Member of the Naming Opportunity Committee

NC State



<https://www.linkedin.com/in/kathy-kennel-607ab94>
kkennel@ncsu.edu

SUMMIT 2018

aasp Association of Advancement
Services Professionals
Fueling nonprofits. Advancing careers.

NOVEMBER 14-16, 2018

NAVIGATING CHANGE THROUGH BEST PRACTICES

CHICAGO, ILLINOIS
THE HILTON CHICAGO

Acknowledgements

Kit Jenkins

*Donor Services Specialist
(Naming Opportunities)*
NC State



Cavell Walcott

*Donor Services Specialist
(Naming Opportunities)*
NC State



SUMMIT 2018

aasp Association of Advancement
Services Professionals
Fueling nonprofits. Advancing careers.

NOVEMBER 14-16, 2018

**NAVIGATING CHANGE
THROUGH BEST PRACTICES**

CHICAGO, ILLINOIS
THE HILTON CHICAGO

NC State Advancement Overview

- NC State is **1 of 17** institutions that fall under the UNC System
- University Advancement is fully **decentralized**
- In **2016**, NC State entered the public phase of its \$1.6 billion **Think and Do The Extraordinary** Campaign
- Campaign concludes **2021**



NC State Facts and Figures



**Raised
\$215.4M
FY18**



**\$1.4B
Campaign
Fundraising TD**



**600,000+
Constituent
Records**



**11
Foundations**



**\$1.3B
Endowment**



**3,000 +
Endowment**

Responsibilities of Donor Services



**Gift
Agreements**



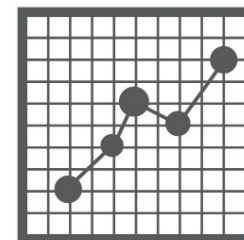
**Naming
Opportunities**



**Allocation
Review**



**Gift
Acceptance**



**Endowment
Reports**

*(Project Management,
Data Integration)*

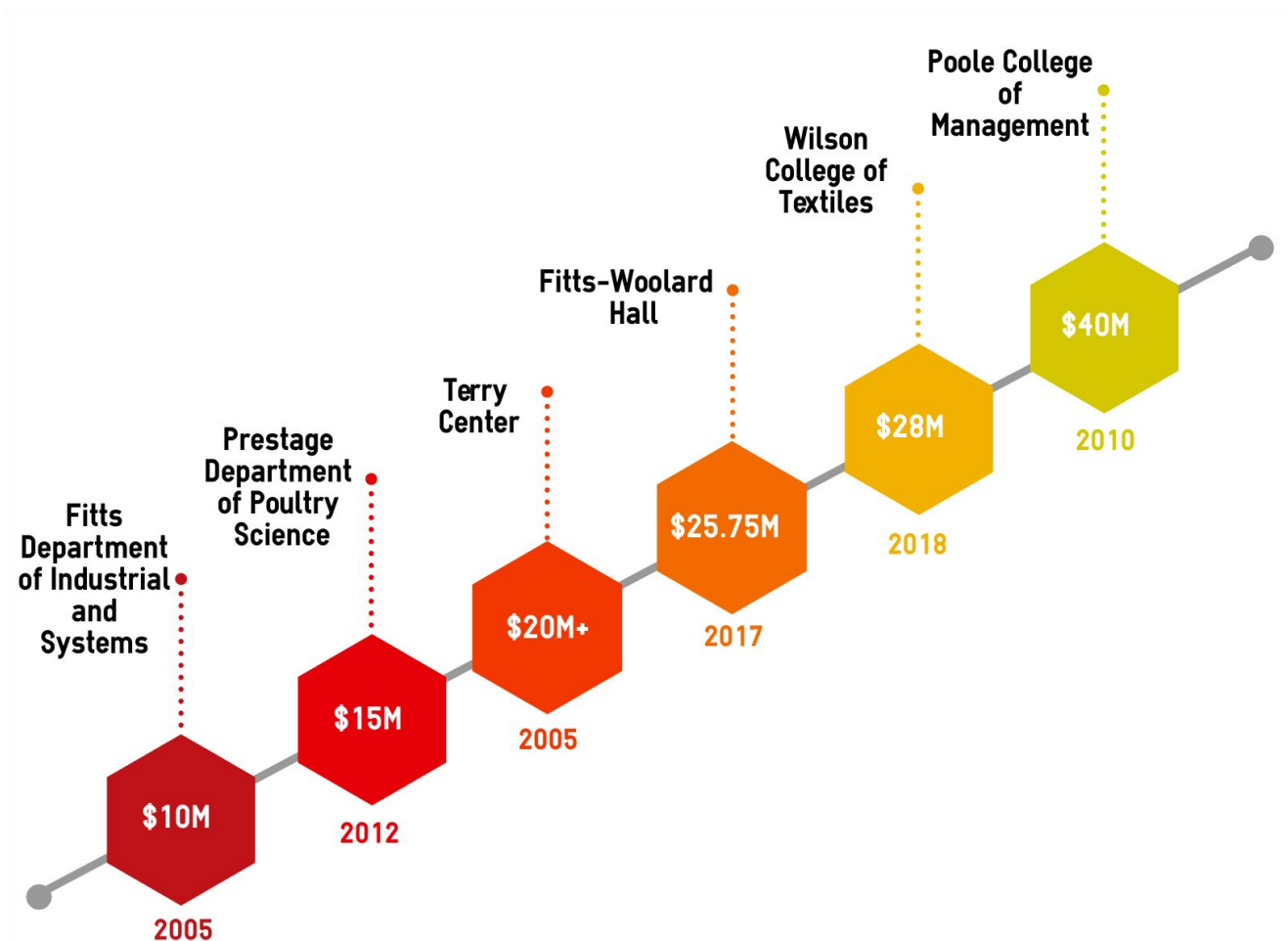


**Distinguished Professorships
(State Matching Program)**

FY18 Naming Opportunity Stats

- **865** facilities calculated
- **6** programs calculated
- **\$249** million of potential facilities for the ability to name approved by BoT (*Board of Trustees*)
- **\$50.6** million donor naming commitments approved by BoT

Largest Committed Naming Opportunities At NC State



Indicates by Fiscal Year

Note: Does not include anonymous gifts

Learning Objectives

- **Gain** the basic knowledge of namings
- **Learn** how NC State is enhancing their naming program
- **Review** NC State's 8 phases of namings but **focus** on strategic planning and naming opportunity analysis
- **Recommend** strategic partners in developing naming opportunities
- **Obtain** NC State's calculation method for facilities and programs

Methodologies Applied

- Process mapping
- PMI project management
- Participation observation
- Good old trial and error
- AASP and ADRP best practices



Donor Services Role within Naming Opportunities

- **Identify** naming opportunities
- **Develop** gift minimum recommendations
- **Facilitate** the approval process
- **Guide College/Units** through the naming process
- **Liaise** with Advancement and Architect/CPM
- **Maintain** naming records and inventory

Culture Shift

- **Remove/loosen/simplify** the red tape
- **Develop** strategic planning methodology
- **Strengthen** partnership between Advancement and Facilities
- **Redefine** ideology on the purpose of naming opportunities
- **Create** calculation and facility selection methodology

Three Categories of Naming



VS



VS



**Donor-Funded
Namings**

**Honorific
Namings**

Hybrid Namings

Note: An honorific naming is rare. It names a facility or program in honor of an individual or organization who has attained achievements of extraordinary and lasting distinction at NC State.

Four Types of Namings

- **New Construction:** A building that is in the planning phase for construction or is currently in construction
- **Renovation:** A room, space or building that is being renovated
- **Existing:** A room, space or building where no recent renovations have occurred and there are currently no future plans to renovate
- **Programs:** New or existing programs, units, departments, colleges, institutes or centers





Phase 1: Strategic Planning and/or Capital Project Fundraising Approval



As a best practice, it is important to develop a strategic fundraising plan to reach fundraising goals. Naming opportunities should not be requested just for developing a catalogue of opportunities (the Toys-r-Us catalogue approach), in the hopes that donors will stumble onto a website and then will shop for the perfect facility or program to be named. -Sarah R. Thomas



Areas of Strategic Planning

1. Purpose statement
2. Goal
3. Risks
4. Resources
5. Prospect list



*“Strive away from just raising money to raise money.
Focus on the impact to transform your organization!”*



Namings and Prospect Pool

Knowing the prospect pool is crucial in developing the list of naming opportunities:

- # of Naming opportunities
- Threshold levels
- Donor interests

NC STATE THINK AND DO THE EXTRAORDINARY

Project's Prospect Pool Worksheet: Naming Opportunities

Please submit the completed worksheet to Donor Services along with your project request for naming opportunities. Complete the top portion of the first sheet and then complete the second sheet.

Project Name	
College/Unit	
Submitter's Name	
Submission Date	
Project Fundraising Goal	

Do Not Complete Donor Services Will Complete		
Giving Levels for Project	Number of Prospects	(Donor Services will complete this section) Number of Available Rooms/Spaces
\$20 million+		
\$15 million - \$20 million+		
\$10 million - \$15 million+		
\$5 million - \$10 million+		
\$2 million - \$5 million+		
\$1 million - \$2 million+		
\$500,000 - \$1 million+		
\$250,000 - \$500,000+		
\$100,000 - \$250,000+		
\$50,000 - \$100,000+		

Potential Giving Level for Project	Donor Name	Potential Interest in Naming	Advance ID#	Notes
\$50,000	Jolly Giant	Broccoli Factory	12345	Loves Broccoli



Capital Project/ Fundraising Approval

**NC STATE
UNIVERSITY**

Capital Project Concept Approval Form

Please complete this form for review and approval from NC State leadership for all proposed capital project initiatives that will require fundraising efforts. This proposal may need to be approved by the BoT in accordance with [POL 03.00.01 - Coordination of Fundraising Activities and Acceptance of Private Donations \(Gifts\)](#). Approval from NC State Leadership is required prior to gaining approval from facilities for renovation and construction projects.

Complete this form and mail to group-uacapitalrequest@ncsu.edu.

Requestor Information

College/Unit <input type="text"/>	Name <input type="text"/>
Foundation <input type="text"/>	Title <input type="text"/>

Capital Project Information

Building Name <input type="text"/>	Project Name <input type="text"/>
---------------------------------------	--------------------------------------

Type of Capital Project (check all that apply)

- | | | |
|--|--|--|
| <input type="checkbox"/> New Construction | <input type="checkbox"/> Interior Renovation | <input type="checkbox"/> Code or Infrastructure Deficiency |
| <input type="checkbox"/> Equipment/Systems Upgrade | <input type="checkbox"/> Exterior Renovation | |

Potential Start Date <input type="text"/>	Potential End Date <input type="text"/>	Has any initial planning or facility feasibility studies been completed toward this proposed project? <input type="checkbox"/> Yes (please attach) <input type="checkbox"/> No
--	--	--

Project Funding Information

Estimated Project Cost <input type="text"/>	Amount Currently Available <input type="text"/>
--	--

Potential Funding Sources for Project

- | | |
|---|--|
| <input type="checkbox"/> State Appropriated Funds | <input type="checkbox"/> Grant Funding |
| <input type="checkbox"/> University Funds | <input type="checkbox"/> Private Support |
| <input type="checkbox"/> College/Unit Funds | <input type="checkbox"/> Loan |
| <input type="checkbox"/> Other <input type="text"/> | |

NC State requires pre-approval for fundraising efforts for the following capital projects:

- New capital projects that require private funding for construction
- Renovation efforts that require private funding for construction

Note: As a best practice, develop a system for approval to fundraise for naming opportunities.



Funding Purpose

The gift to name a facility will be directed into either a current use fund or an established (pooled) endowment fund and can support some of the following items:



Capital Projects



Building
Maintenance



Faculty and Staff
Support



Dean's Initiatives



Scholarships



Program Support



Phase 2: Naming Opportunities Analysis





Initiation for Existing Facilities or Programs

(Excludes new construction or confidential)

- College/unit will complete the **Naming Recommendation Letter Request Form** (*electronically*)
- The request is automated to an **online queue** which alerts Donor Services and allows the college/unit to view their project status



The Naming Cubical



Initiation

for New Construction

(or confidential)

- Chief Development Officer contacts Director of Donor Services
- Director assesses the situation
- Completes **Naming Recommendation Letter Request Form**
(offline)



Plant Sciences Initiative Building eta. 2022



Discovery Meeting

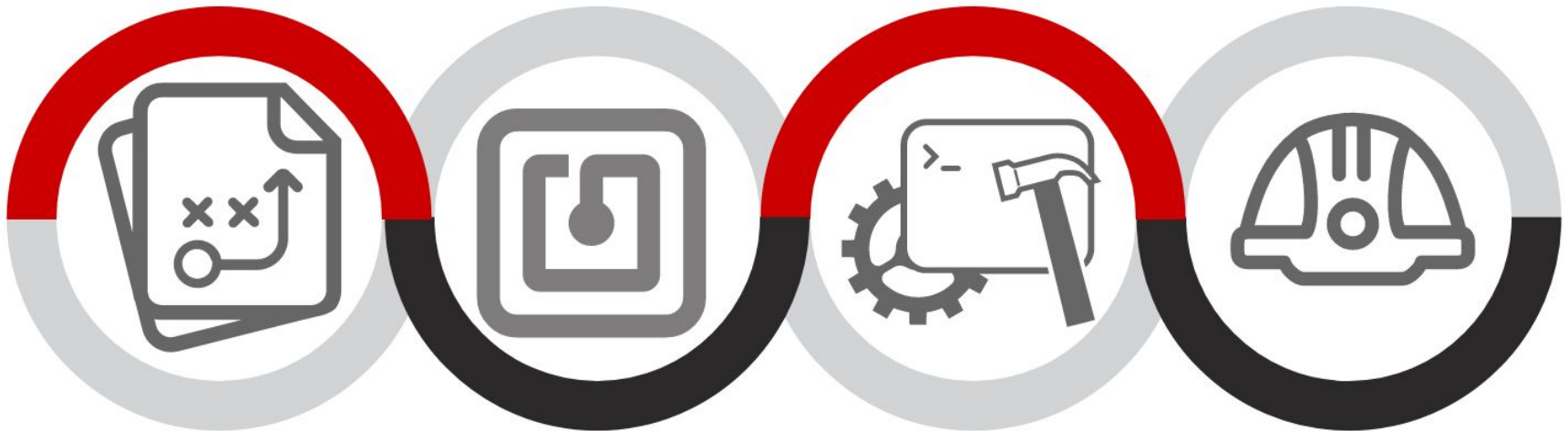
The Director of Donor Services will meet with the college/unit and/or tour the facility (*if applicable*), to discuss the project and its status, including:

- Naming opportunities
- Prospect pool
- Requirements for the BoT approval process
- Risks
- Next steps

Note: For new construction or major renovation projects, the Director of Donor Services is on the Building Committee roster



Four Phases of Design



**Advance
Planning Phase
(AP)**

**Schematic
Design
Phase
(SD)**

**Design
Development
Phase
(DD)**

**Construction
Document
Phase
(CD)**

1. Select rooms and spaces
2. Develop gift ranges

Develop gift minimums

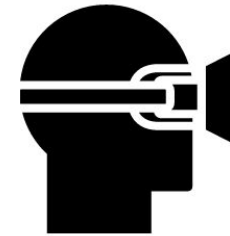
Determining Namings For New Construction



Construction Plans
and Floor Plans



Building Committee



Virtual Reality



Renderings



Creativity
and Imagination



Research: Facilities Database

Donor Services has partnered with the Architect's Office and has access to:

- Capital project tracker
- Document imaging system
- Facilities database

...and we have customized our own **naming module** within their database!

Advancement Services



VIEWS

Rooms w/ Naming Status

Naming Status List
College/Unit List

Building List
Rooms (All)



PLANS

North Precinct
Central Precinct
South Precinct
West Precinct
Centennial Precinct
Lake Wheeler
Reedy Creek
Outlying Properties



REPORTS

60.01 Room Naming Status by Building
60.02 Naming Room Information with Photos

60.03 Room Export

This partnership allows us to have direct access to all the materials and reduces communication errors between Donor Services and the college/units.



Research

Donor Services will research and acquire the following information in partnership with the Architect and Capital Project Management:

- Design phase (*new construction or renovation*)
- Construction plans and/or floorplans
- Capital project manager (*new construction or renovation*)
- Project and replacement cost
- Previous namings and history (*existing facilities*)
- Approval by the Board of Trustees and/or Board of Governors (*new construction or renovation*)
- Purpose of every room/space and location
- Square footage

Research Example

NC STATE UNIVERSITY

> 01_Rooms with Naming Status

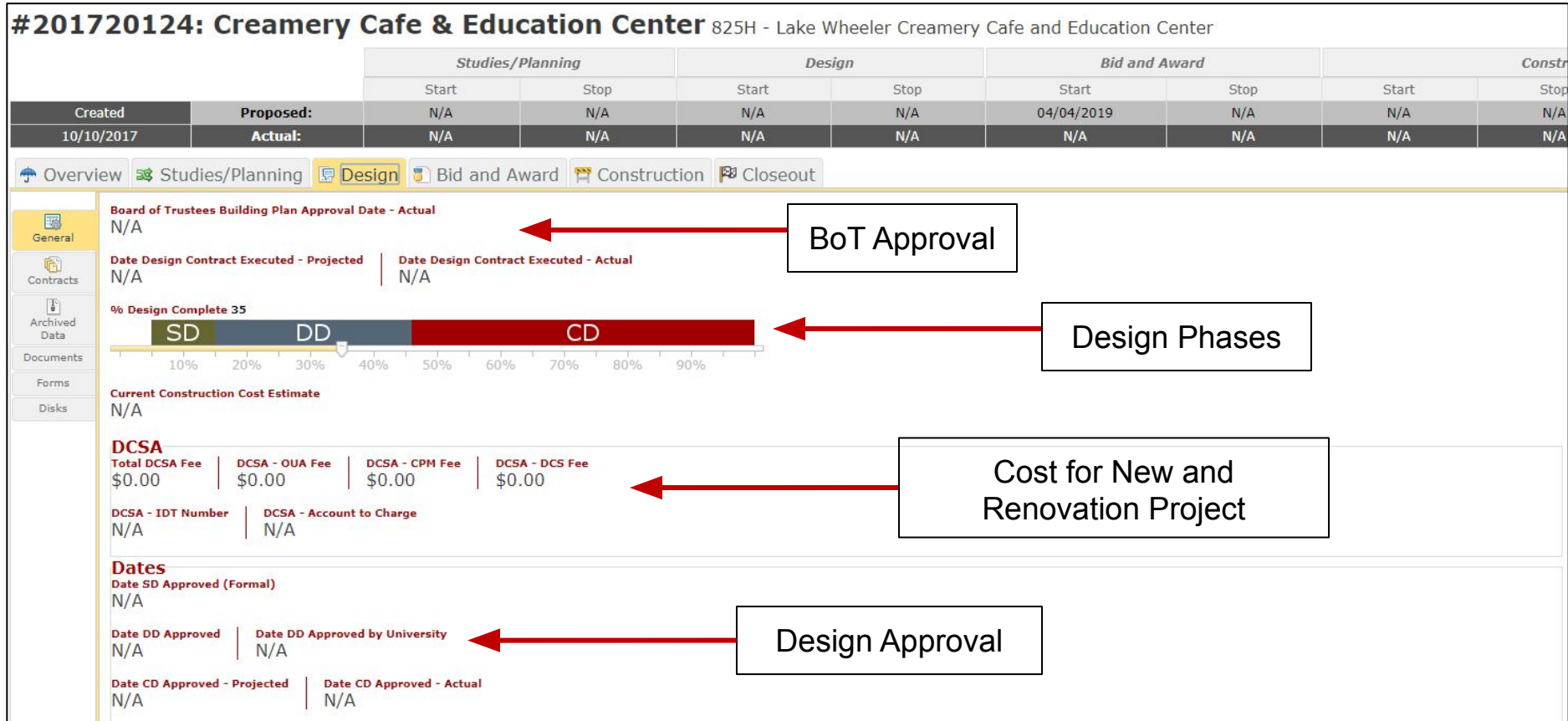
Bldg 001 Gregg Museum of Art & Design
 Building Description Gregg Museum of Art & Design
 Room # 100A [View](#)
 Room Name [i](#)

[Naming Information](#) [Bldg Info](#) [Room Info](#) [History](#) [Gift Information](#) [BoT/Naming Approval](#) [Signage](#) [Photos](#) [Confidential Docs](#) [Documents](#)

Floor [i](#) 01 [View](#)
 Room Name [i](#)
 Room # 100A [View](#) ← **Sq ft**
 Area 95.62 ← **Room Usage**
 Assignable Area 95.63
 Room Usage [i](#) 515 Armory Service
 Usage Description Information/C
 Capacity [i](#) 0
 Occupancy 0
 Station Count 1
 College/Unit
 OUC Code 243001 Arts NC State
 OUC Code Name [i](#) Arts NC State
 Room Renovation
 Room Renovation Year
 Room Renovation Project Cost \$0.00 ← **Renovation Info**
 Room Enhancements
 Notes

Example of Researching the Room/Space

Research Example



Example of Capital Project Research



Selecting Rooms/Spaces

Analysis includes the following:

- Location
- Premier rooms or spaces
- Room and space conflict
- Room groupings
- Room eliminations
- Devaluation
- Location of sign installation



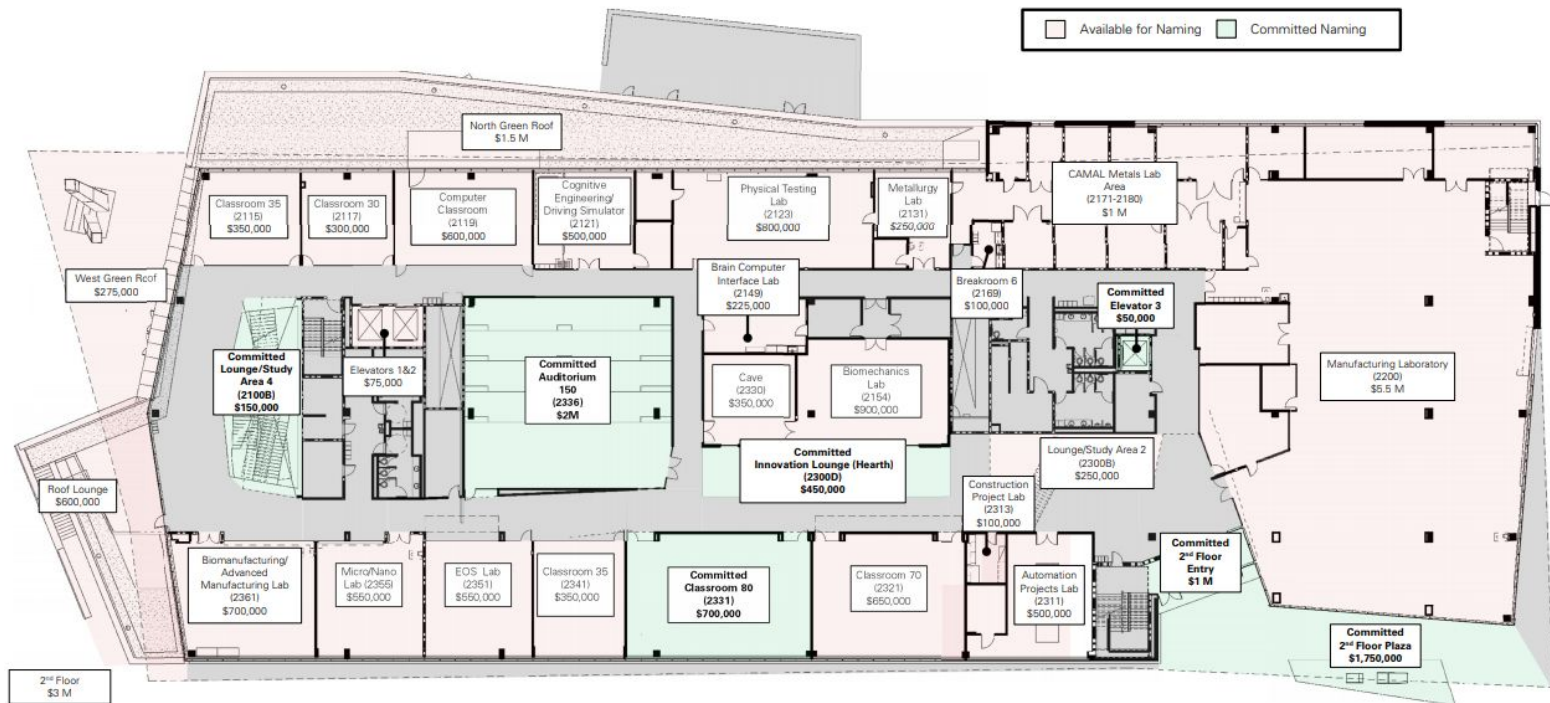
Selecting Facilities



NC STATE THINK AND DO
THE EXTRAORDINARY

Fitts-Woolard Hall
Second Floor

| 2



Naming Opportunities

As of 8.28.2018
Design elements subject to change

Example of Naming Opportunity Map Overlay



Considering What to Name

1. Strive for tasteful naming opportunities
2. Maintenance costs (*If you name it, you have to maintain it*)
→ **Example: Bench namings**
3. Inventory management (*If you name it, you have to track it*)
→ **Example: Bricks and item namings**
4. Issues with naming living items
→ **Example: Trees and animals**
5. The donor is naming the room/space not the purpose



What Can Be Named

Buildings

Courtyards

Complexes

Interior/ Exterior Spaces

Significant Architectural Features

Water Features

Rooms

Agricultural Plots

Bridges

Programs

Dir./Dept. Head Offices

Suites

Roads

Athletic Fields

Forests



What Can Not Be Named

Maintenance Areas

Steps

Bathrooms

Sewers

Benches

Mother Rooms

Animals

Equipment

Drainage

Roofs

Most Offices

Trees

Bike Racks

Lights

Doors

Chairs

Bricks

Bookshelves

Desks

Bird Baths

Copy Rooms

Temporary Features



Room and Space Terminology

Create standard room/space terminology, which brings about consistency across campus, assists wayfinding and allows donors to easily and accurately identify rooms/spaces.



Stormwater Control Measure vs. Water Fountain vs. Water Feature



Methodology for Facilities

Donor Services uses a mathematical formula to serve as a baseline to recommend minimum gift values. The Director will adjust minimums based on various factors (*Minimum for donor-funded naming opportunities is \$25,000 at NC State*).

Measurable factors are based on:

- Cost
- Square footage
- Visibility
- Utility

Donor Services uses additional measurable factors based on:

- New construction
- Renovations or existing rooms
- Room/spaces or buildings



Formula to Calculate Minimum Gift Value for Rooms/Spaces

Baseline Value for Minimum Gift Value: Room/Space =
Adjusted Space Sq Ft x Utility x Visibility x 1/2 of Facility Cost
per SqFt
 +/- Optional Adjustment% for Decrease/Increase Factors

Building's Gross Square Footage	Total New Building Cost or Estimated Replacement Cost (ERC)	1/2 ERC (per policy)	Calculated on Cost per SqFt
62,800	\$45,000,000	\$22,500,000	\$271.739

Numbers confirmed in AERES 8/23/18



SAMPLE CENTER PROJECT:
based on 7/6/18 plans from UA

Floor	Room #	SPACE	Square Footage	Utility Index	Visibility Index	Initial Calculated Value	Adjusted Baseline	NOTES
		FEATURES						
2	2104A-D	Main Lobby w/member check-in, wellness bar & adjacent lounge	2,625	1	1.25	\$891,644	\$1,000,000	ST adjusted 9/4
1	1120A	Climbing Center FEATURE	2,950	1.25	1.5	\$1,503,057	\$1,500,000	ST adjusted 9/4
3-4	300 & 400	Sprint Ramp FEATURE	2,445	1.25	1.5	\$1,245,754	\$1,250,000	ST adjusted 9/4



Calculator for Existing Facilities

Calculation Information

Update Calculations?

☐

Project Type

Existing

1/2 Bldg Replacement Cost

\$4,675,580.50

USD

Naming Cost per Sq Ft

\$186.93

USD

Room Assignable Area

95.63

Adjusted Sq Ft

95.00


Utility Index Value

1.00

Location Index Value

1.00

Adjustment Index (ADV)



0.00

Calculated Value

\$8,834.59

USD

Rounded Baseline Value

\$8,800.00

USD


Recommended Minimum Value

\$8,800.00

USD

Recommended Calculated Value Date

6/8/2018



Recommended Low Range Value

\$8,000.00

USD

Recommended High Range Value

\$10,000.00

USD

Actual Named Value

\$8,000.00

USD

Calculation Notes

Example of the calculator inside of the naming module



Basic Indexes

Indexes are assigned to each room/space to act as a weight

Baseline Index:

- **Utility Index** is based on the function of the room/space
- **Visibility Index** is based on the visibility of the signage, location, users, traffic/use and exposure of the name in university communications, websites or flyers



Adjustment Index

The adjustment index is optional and may not always be used for each calculation

Adjustment indexes are possible factors for increase or reduction of the room/space calculation

Reasons for adjustments:

- Age or condition of an existing facility
- Degree of a renovation project
- Other factors



Adjustment Index

Adjustment Indexes

Building Status Level Index	
Building Status	Adjustment to Replacement Cost
Building Status Level 1	0%
Building Status Level 2	0%
Building Status Level 3	-5%
Building Status Level 4	-10%
Building Status Level 5	-15%
Building Status Level 6	-20%
Building Status Level 7	-25%

Renovation Project Index	
Degree of Renovation	Increase
Renovation Level 1	+5%
Renovation Level 2	+10%
Renovation Level 3	+15%
Renovation Level 4	+20%
Other Adjustments	
Circumstances	Adjust
Gift Assessment Fees	+7%



Building Status Level

Building Status Level 1	<ul style="list-style-type: none"> • Building's age is less than 10 years old
Building Status Level 2	<ul style="list-style-type: none"> • Hallowed building/space or on the historical registry
Building Status Level 3	<ul style="list-style-type: none"> • Building's age is between 10 to 20 years old • Has had significant renovations within 5-10 years
Building Status Level 4	<ul style="list-style-type: none"> • Building's age is between 10 to 20 years old • Has had no significant renovations within 5-10 years
Building Status Level 5	<ul style="list-style-type: none"> • Building's age is between 20 to 40 years old • Has had significant renovations within 5-10 years
Building Status Level 6	<ul style="list-style-type: none"> • Building's age is between 20 to 40 years old • Has had no significant renovations within 5-10 years
Building Status Level 7	<ul style="list-style-type: none"> • Building's age is above 40 years of age • Has had significant renovations within 5-10 years
Building Status Level 8	<ul style="list-style-type: none"> • Building's age is above 40 years of age • Has had no significant renovations within 5-10 years

Baseline Indexes

Baseline Indexes

Utility Indexes		Visibility Indexes*	
0.5	<ul style="list-style-type: none"> Entire Floor Locker Room (recreation/general use) Sustainability Focus Space or Resource 	0.5	Very Low Visibility or Use, including: <ul style="list-style-type: none"> Secured location Basement
0.75	<ul style="list-style-type: none"> Administrative/Faculty Office 	.75	Low Visibility or Use, including: <ul style="list-style-type: none"> Restricted or Minimal access/use Minimal signage opportunity
1	<ul style="list-style-type: none"> Classroom Garden Common Space Teaching Laboratory Research Laboratory/Space Office Suite Dining Facility Outdoor Recreation Space/Facility Library Room or Resource Healthcare Space Student Study Rooms 	1	Average Visibility or Use, including: <ul style="list-style-type: none"> Any non-featured classroom Any non-featured laboratory Any non-featured office
1.25	<ul style="list-style-type: none"> Animal Housing Department Head/Director Office Featured Library Room or Resource Featured Research Laboratory Recreation: Equipment/Workout Room Student Services Area Veterinary Exam Room (general use) Team Locker Room Recreation Classroom 	1.25	High Visibility or Use, including: <ul style="list-style-type: none"> High volume of student and/or staff use Located near a high traffic area
1.5	<ul style="list-style-type: none"> Computer/Technology Classroom General Meeting Room Featured Teaching Laboratory Featured Classroom Animal Treatment/Care Athletics Facility (restricted use) Arts Space (non-performance) 	1.5	Very High Visibility or Use, including: <ul style="list-style-type: none"> Main entry area Performance space Strong name recognition and exposure (brochures, web references etc)
1.75	<ul style="list-style-type: none"> Featured Office Teleconferencing Meeting Room Featured Conference Room (>25 capacity) Veterinary Surgical Space Featured Student Services Space Featured Recreation Space Event Space 	1.75	Extremely High Visibility or Use, including: <ul style="list-style-type: none"> Main entry area/audience includes public Wide name recognition and exposure (including media coverage)
2	<ul style="list-style-type: none"> Auditorium (>125 capacity) Main Entry Area Athletics or Performance Space (general use) Hallowed Space or on Historical Registry 	2	Extraordinarily High Visibility or Use, including: <ul style="list-style-type: none"> Featured athletics space Extremely wide name recognition and exposure (including broadcast coverage) Hallowed Space or on Historical Registry

Note: "Visibility" includes visibility/exposure of the name based on location, association, users, traffic/use, media, etc.

Note: "Featured" is defined as a key space and is in relation to each project.



Determining Minimum Gift Values for Programs

The minimum gift value for a new or existing program is based on multiple factors and will be provided by the Director of Donor Services and approved by the Vice Chancellor of University Advancement.

Factors for Calculation

- Program's budget
- Future funding
- Annual endowment distribution
- Fundraising initiative
- Program ranking
- Comparable value at benchmark institutions



Prestage Department of Poultry Science Announcement

Naming Recommendation Letter



Naming Opportunity Recommendation Letter Template for New Construction or Renovations

[Insert Date]

[Requestor's Name]

[Requestor's Title]

[College]

[Address]

[Mail Code]

[City, ST, Zip]

Dear [Insert Requestor's Name],

The Office of Donor Services has completed your request for a recommendation evaluation of available facility naming opportunities for the [Insert Request Facility or Space].

Our office recommends the following spaces and development values, as listed below:

Naming Opportunities for [Insert Facility Name Spaces]	Room	Square Feet	Development Value

Based on [Insert Type of Documents] documents received on [Insert Date].

Fund Destination

Based on information provided to Donor Services by the [Insert College], received naming opportunity gifts for these spaces will be placed in a [Insert type of fund] for [Insert fund purpose].

Construction Information

[Insert facility name] was originally constructed in [Insert year] for [Insert construction price]. [Include any information about major renovations.]

Building Location

[Insert address]

Building History

[Insert any building history located on FMI. Do not conduct any history. Only used provided information.]

Calculation Information

Our naming opportunity recommendation is based on [Insert facility name] current replacement value of [Insert Amount] (as of [Insert date]) and the assignable square footage of [Insert sq ft]. This data was provided to our office by the Office of the University Architect. Our calculations are based on an established formula developed by our office to retain naming opportunity consistency at NC State and aligns with POL 03.00.02 – Criteria and Procedures for Naming Facilities and Programs.



Naming Opportunity Recommendation Letter Template for New Construction or Renovations

BoT Approval

The Office of Donor Services also recommends that these proposed naming opportunities should be presented at the [Insert month and year] Board of Trustees Meeting (BoT). In preparation for that meeting, a draft of the narrative to propose a list of naming opportunities is due to the Office of Donor Services by [Insert Deadline]. The [Insert College] will be responsible for presenting this proposed naming opportunity at the Board of Trustees meeting on [Insert Date]. If your proposal is approved by the Naming Opportunity Committee to be presented to the BoT, the Office of University Advancement will contact you with further information about the time and location of the meeting.

Naming Opportunity Recommendation Validation Date

This Naming Opportunity Recommendation is valid until [Insert date]. If these naming opportunities are not proposed and approved by the BoT before [Insert date], then a new Naming Opportunity Recommendation from the Office of Donor Services will be required before proposing these opportunities to the BoT.

Process for Approval of Naming Opportunities for Facility Commitments

Once initial BoT approval has been granted for the ability for these spaces to be named, a donor should complete a Naming Commitment Intent Form to pledge their commitment to their preferred room/space to be named. Please submit the Naming Commitment Intent Form to the Office of Gift and Records Management and email a scanned copy to the Office of Donor Services.

In addition, contact the Office of Donor Services about the BoT process for Donor Naming Opportunity Proposals. The donor's commitment to a specific space is not final until BoT approval of that commitment.

Signage Requests

Signage requests are conducted through the Office of the University Architect. Signage cannot be requested until the Donor Naming Proposal has been approved by the BoT and the college/unit has received an approval letter from Donor Services.

Publicizing Naming Opportunity Naming Commitments

The Office of Donor Services advises you not to publicize donors' names to committed spaces with gift amounts until after BoT approval. Once approved by the BoT, our office will send a letter of BoT approval with notification that you can publicize donors' naming opportunity information. Any exceptions to publicize before BoT approval will need to be approved by the Vice Chancellor of Advancement.

Sincerely,

Sarah Thomas
Director, Donor Services
Advancement Services
NC State University
Campus Box 7474
1210 Varsity Drive
Raleigh, NC 27695-7474

Naming Opportunities List



Example
List of Naming Opportunity Ranges by Category

Summary of Category Ranges	
Number	Range of Minimum Gift Values
1	[Building naming]
2	\$3 million - \$4 million
9	\$2 million - \$2.75 million
5	\$1 million - \$1.75 million
11	\$500,000 - \$600,000
12	\$400,000 - \$475,000
7	\$300,000 - \$375,000
9	\$200,000 - \$275,000
22	\$100,000 - \$175,000
36	\$25,000 - \$75,000
114 Spaces	\$51 million - \$62.1 million

Summary of Categories	Number	Range of Minimum Gift Values
Named Building	1	[TBD]
Featured Opportunities	18	\$50,000 - \$4.25 million
House Areas	14	\$225,000 - \$4.25 million
Laboratories	25	\$75,000 - \$2.5 million
Meeting Rooms	32	\$25,000 - \$1.25 million
Multi-purpose/Common Spaces	20	\$25,000 - \$850,000
Office Areas	4	\$100,000 - \$825,000

*Subject to change
**BOT approved at this level Feb. 2018

Note: Gray indicates a space no longer available.



Example
List of Naming Opportunities

Meeting Rooms (continued)	Floor	Room(s)	Square Feet *	Minimum Gift Value
Student Study Room 8	2	2342	60 sq ft	\$25,000
Student Study Room 9	3	3340	60 sq ft	\$25,000
Student Study Room 10	3	3342	60 sq ft	\$25,000
Student Study Room 11	2	2102	50 sq ft	\$25,000
Student Study Room 12	2	2104	50 sq ft	\$25,000
Student Study Room 13	3	3102	50 sq ft	\$25,000
Student Study Room 14	3	3104	50 sq ft	\$25,000
Student Study Room 15	4	4102	50 sq ft	\$25,000
Student Study Room 16	4	4104	50 sq ft	\$25,000

Multi-Purpose/Common Spaces	Floor	Room(s)	Square Feet *	Minimum Gift Value
Education Area	1	1310	1,561 sq ft	\$825,000
Seminar Room Lobby	1	1320	1,111 sq ft	\$850,000
4th Floor Connecting Corridor	4	4240	824 sq ft	\$300,000
3rd Floor Connecting Corridor	3	3240	810 sq ft	\$300,000
2nd Floor Connecting Corridor	2	2240	669 sq ft	\$300,000
Lounge Area 1	1	1230-32	488 sq ft	\$175,000
2nd Floor Breakroom	2	2158	481 sq ft	\$175,000
Breakroom Seating 3A	3	3152	445 sq ft	\$175,000
Breakroom Seating 4A	4	4152	359 sq ft	\$175,000
Lounge Area 2	3	3151	400 sq ft	\$175,000
Lounge Area 3	4	4151	400 sq ft	\$175,000
Lounge Area 4	2	2240A	244 sq ft	\$100,000

*Subject to change



Phase 3: Naming Opportunity Approval



Chancellor Randy Woodson at a Board of Governors Meeting (on the left)



Phase 4: Solicitation



Fitts-Woolard Hall Groundbreaking Ceremony



Phase 5: Board of Trustees Approval of Donor Naming



Wilson College of Textiles Announcement



Phase 6: Signage Approval



Fitts-Woolard Hall Groundbreaking Ceremony



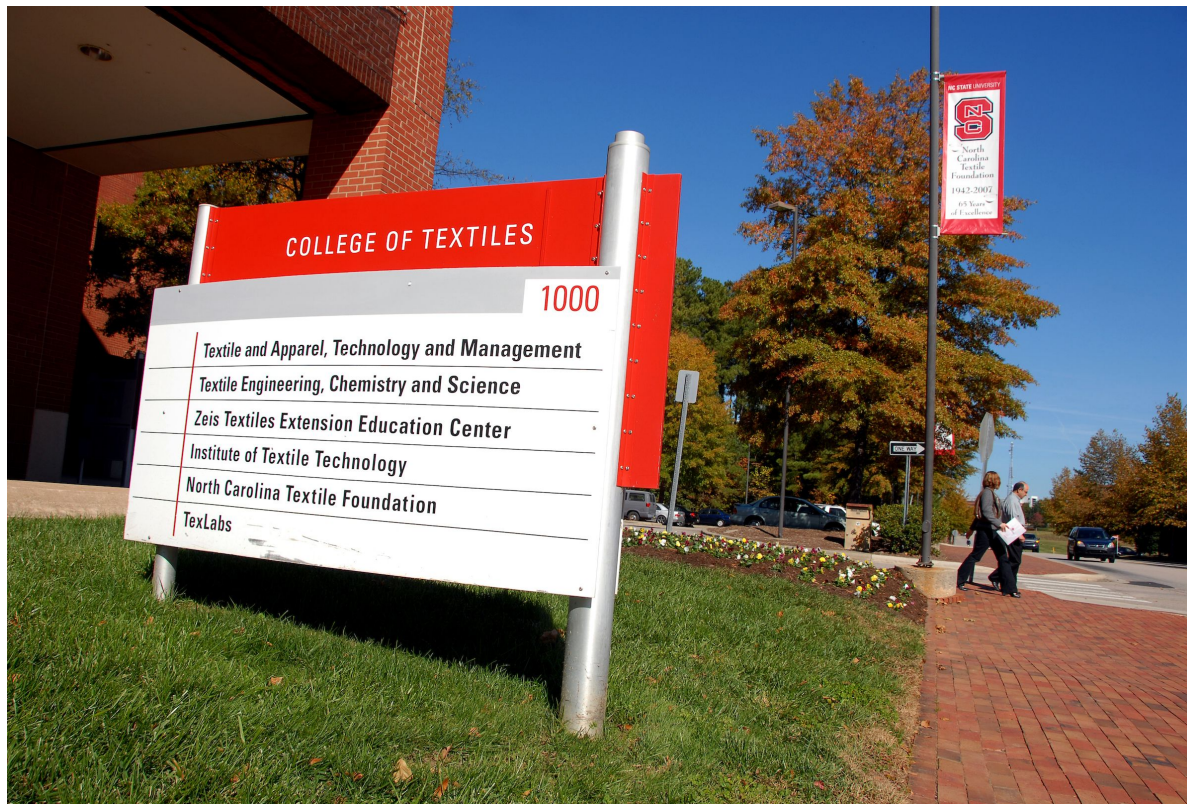
Phase 7: Stewardship



Sample stewardship gifts from the Prestage Department of Poultry Science



Phase 8: Inventory and Records Management



"If you name it, you have to track it" - Sarah R. Thomas



Inventory and Records Management

The management of naming inventory and records is not a final step, but an ongoing process that follows a naming opportunity before, during and after a facility or program is named.

Donor Services:

- **Maintains** historic and current inventories and records for donor-funded and honorific named facilities and programs
- **Tracks** the status of each naming opportunity throughout its naming process
- **Provides** naming history and research
- **Location** of a donor-funded or honorific naming



The Naming Module: Naming Info

NC STATE UNIVERSITY

> **01_Rooms with Naming Status**

Bldg 001 Gregg Museum of Art & Design
 Building Description Gregg Museum of Art & Design
 Room # 101 [View](#)
 Room Name [i](#)

Naming Information | Bldg Info | Room Info | History | Gift Information | B

Naming Status Available to Name
 Project Name 2018 Renovation
 Official Name The Elvis Room
 Short Name Elvis
 Term Naming Time Limited (See Notes)
 Term Period in Years 10
 Term Start Date 6/11/2018
 Term End Date 6/11/2028
 Fund Purpose (ADV) All funds went towards this renovation project.
 Notes

Calculation Information

Update Calculations? ☐
 Project Type New Construction
 Assignable Bldg Gross Area 13,926.57
 Replacement Cost (OUA) 9,351,161
 1/2 Bldg Replacement Cost \$4,675,580.50
 Naming Cost per Sq Ft \$335.73
 Room Assignable Area 2,155.41
 Adjusted Sq Ft 2,155.00
 Utility Index Value 2.00
 Location Index Value 2.00
 Adjustment Index (ADV) [i](#) 0.00
 Calculated Value \$2,894,000.22
 Rounded Baseline Value \$845,000.00
 Recommended Minimum Value \$800,000.00
 Recommended Calculated Value Date 7/17/2018
 Recommended Low Range Value \$750,000.00
 Recommended High Range Value \$900,000.00
 Actual Named Value \$0.00
 Calculation Notes

Example: Not Real Information



The Naming Module: Building Info


NC STATE UNIVERSITY

> 01_Rooms with Naming Status

Bldg 001 Gregg Museum of Art & Design
 Building Description Gregg Museum of Art & Design
 Room # 101 [View](#)
 Room Name [i](#)

[Naming Information](#) **[Bldg Info](#)** [Room Info](#) [History](#) [Gift Information](#) [BoT/Na](#)

Building Information

Building Number 001
 Building Description Gregg Museum of Art & Design
 Bldg Abbreviation GRM
 Image Path 

Site Code NORTH North
 Address 1903 Hillsborough St.
 City Raleigh
 State/Province NC
 Zip/Postal Code 27607
 Map It! [Map It!](#)

Construction

Year Constructed [i](#) 1930
 Original Building Code [i](#) 579,455
 Replacement Cost 9,351,161
 Replace Cost Date Updated 9/7/2017






Building Status

Building Status
 Gross Area [i](#) 0
 Assignable Area 13,926.57
 Number of Floors 3
 Residents Code 1 Non-Residential
 Bldg Use Type Code Other
 Bldg Funding Code 1 Self-Liquidating
 Owner Code 1 Owned in fee simple

Example: Not Real Information



The Naming Module: Room Info

Bldg	001 Gregg Museum of Ar	
Room #	100A	
Room Name		
<div> Naming Information Bldg Info Room Info History Gift Information BoT/Naming Approval Signage Photos Co </div>		
Floor	 01	
Room Name		
Room #	100A	
Area	95.62	
Assignable Area	95.63	
Room Usage	 515 Armory Service	
Usage Description	Information/C	
Capacity	 0	
Occupancy	0	
Station Count	1	
College/Unit	Select One	
OUC Code	243001 Arts NC State	
Room Renovation	Select One	
Room Renovation Year		
Room Renovation Project Cost	\$0.00 USD	
Room Enhancements		
Notes		

Example: Not Real Information



The Naming Module: Gift History

Items 1 to 8 of 8 Page: 1 of 1 Go Page size: 50

Bldg 001 Gregg Museum of Art
Room # 100A
Room Name

Naming Information Bldg Info Room Info **History** Gift Information BoT/Naming Approval Signage Photos Confidential Docs Documents

Donor Naming History

<input type="checkbox"/>	Previously Named?	Type of Naming	Project Name	Official Room Name	Room Short Name	Term Naming	Term Period in Years	Term Start Date	Term End Date	Reason for Name Change	Approved	Approved By	Approved by Date	Fund Purpose
<input type="checkbox"/>	Yes	Named-Funded	Evlis	Cheese Room	Blue Cheese	Life of Space		6/14/2018		Space Demolished/Removed	No			

Bldg 001 Gregg Museum of Art
Room # 100A
Room Name

Naming Information Bldg Info Room Info **History** **Gift Information** BoT/Naming Approval Signage Photos Confidential Docs Documents

Actual Named Gift Amount \$8,000.00 USD

Gift Type Select One

Fund Purpose

Allocation Code 0

Foundation Managing Funds Select One

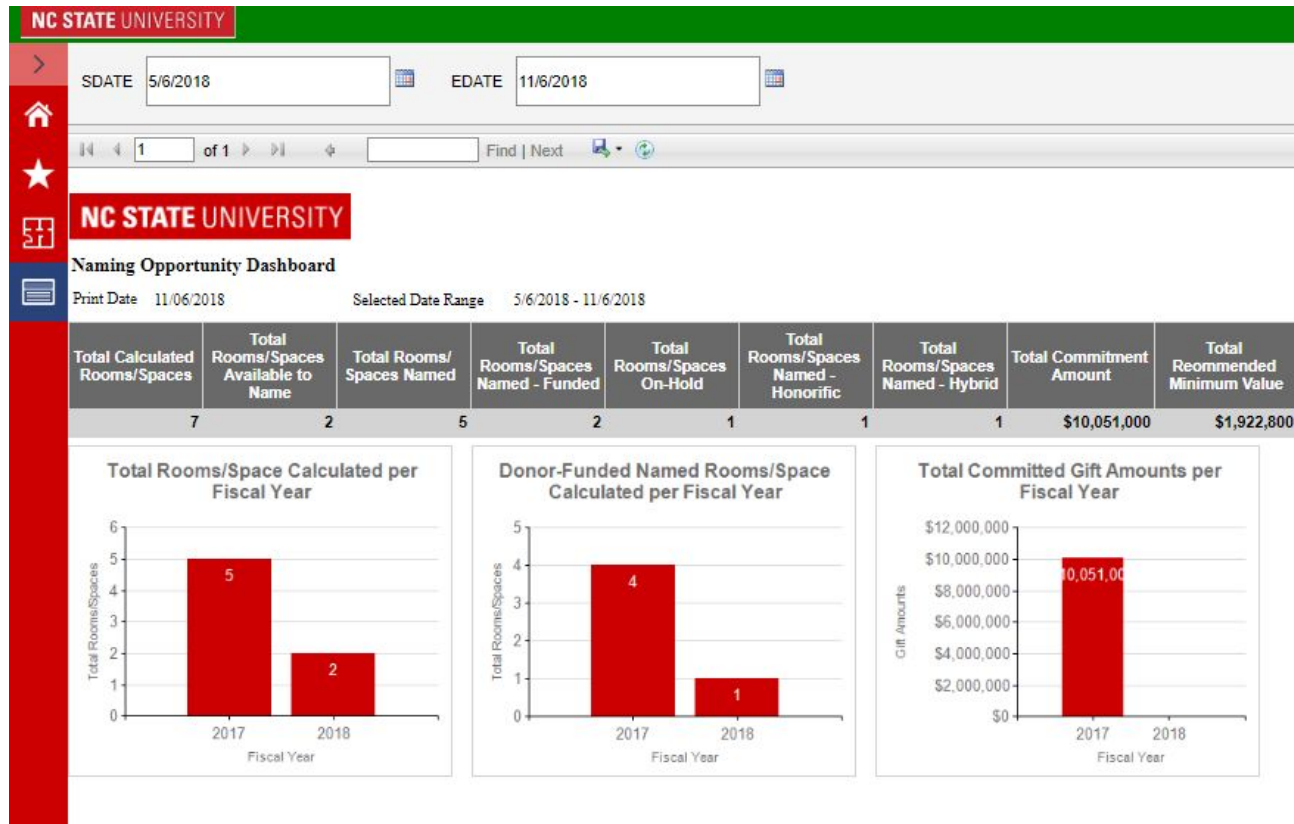
Donors

<input type="checkbox"/>	Donor Name	Donor ID	Donor Type	Anonymous	Advance Proposal #	Commitment Amount	Commitment Date
<input type="checkbox"/>	Chris Pratt	209384	Individual	<input checked="" type="checkbox"/>	4543563	\$10,000,000.00	11/13/2018

Example: Not Real Information



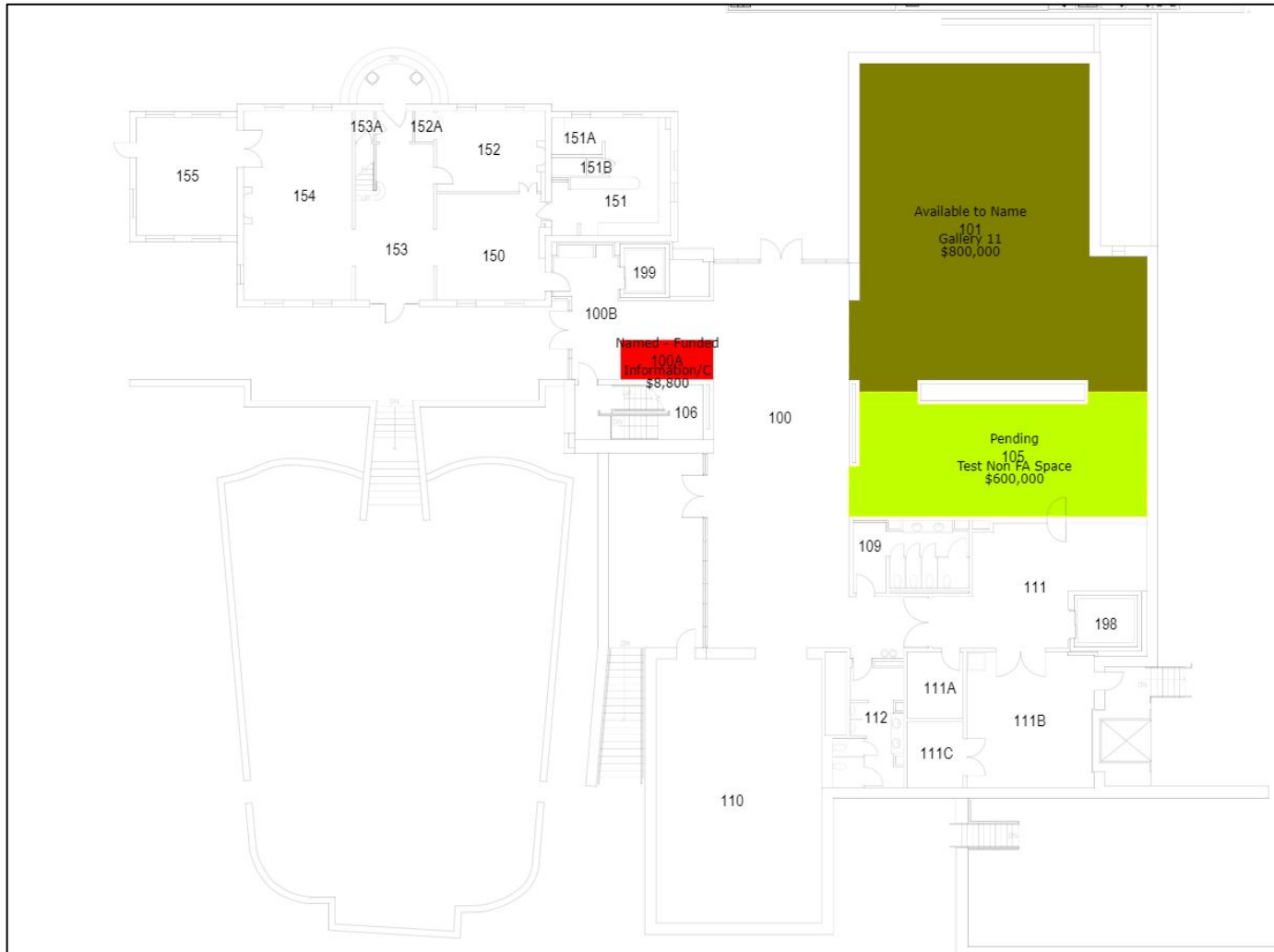
The Naming Module: Naming Dashboard



Example: Not Real Information



The Naming Module: Naming Map



Example: Not Real Information

Conclusion

The process and tools that Donor Services has developed have:

- Allowed NC State to think strategically when selecting opportunities
- Established consistent standards
- Allowed NC State to better evaluate facilities and programs
- Increased accuracy of our naming agreements
- Opened communication between facilities and advancement
- Helped guide our colleges/units through the process
- Enhanced donor relations
- Reduced red tape
- Centralized record management