
BACKGROUND INFORMATION:

Development Report

Part I: Gifts/Dues Received July 1, 2006 – February 28, 2007

Attachment A compares gifts received July 2005 – February 2006 with gifts received July 2006 – February 2007 and denotes a 63.2% increase from the previous year. The attachment shows these comparisons based on giving by entity and sources of support. Included in this total of $12,288,414.11 is $2,328,685.42 in gifts from bequests, $3,022,426.51 in life income gifts and $192,248.91 in gifts from in kind contributions.

Part II: New Dollars

New dollar commitments (i.e. received gifts that do not represent commitments on pledges made prior to the beginning of 2006-07, plus new pledges for future commitments, plus corporate matches of the gifts of their employees) totaled $11,249,061 through the end of February, a 24.9% increase over 2005/06’s total of $9,004,423.

<table>
<thead>
<tr>
<th></th>
<th>2006/07 (7/1/06-2/28/07)</th>
<th>2005/06 (7/1/05-2/28/06)</th>
<th>Inc/(Dec)</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Dollars</td>
<td>$11,249,061</td>
<td>$9,004,423</td>
<td>24.9%</td>
</tr>
</tbody>
</table>

Part III. Documented Planned Gift Commitments

A complete picture of the University’s development activity includes documented bequests, life income gifts for which the Excellence Foundation is not trustee, perpetual charitable trusts being managed outside of the University, life insurance gifts, and other testamentary commitments. These gifts are known as revocable. Irrevocable planned gifts are those gifts that the Excellence Foundation serves as a trustee. These gifts are included in the new dollars in Part II. In terms of their cultivation, solicitation and stewardship revocable planned gift commitments are treated like outright gifts by the University. Documented planned gift expectancies to date totaled $6,545,700 a 17.6% decrease from last year’s total of $7,945,386. The following chart compares documented planned gift expectancies generated in 2006/07 with 2005/06.
Documented Planned Gifts: $6,545,700 $7,945,386 (17.6)%

**Part IV. Combined New Dollars and New Deferred Commitments**

Parts I, II and III of this summary report on current and deferred giving to the University. Part IV combines new dollars with deferred gift dollars to give an overarching view of the productivity of the Development Office through 2/28/07:

<table>
<thead>
<tr>
<th></th>
<th>2006/07 (7/1/06-2/28/07)</th>
<th>2005/06 (7/1/05-2/28/06)</th>
<th>Inc/(Dcr)</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Dollars*</td>
<td>$11,249,061</td>
<td>$9,004,423</td>
<td>24.9%</td>
</tr>
<tr>
<td>New Deferred Commitments**</td>
<td>$6,545,700</td>
<td>$7,945,386</td>
<td>(17.6)%</td>
</tr>
<tr>
<td></td>
<td>$17,794,761</td>
<td>$16,949,809</td>
<td>4.9%</td>
</tr>
</tbody>
</table>

*New dollars = (gifts receipted in 2006/07) + (pledges for future commitments) + (corporate matching gifts) – (payments made in 2006/07 on pledges made in prior years)

**Deferred commitments are counted at present value.

**Part V. New Endowed Accounts**

New endowed accounts established in the UNCG Excellence Foundation between July 1, 2006 and February 28, 2007 include:

Mary Ellen Lay “Mel” Schumaker Scholarship
Gene and Pat Holder Scholarship
Dr. Neil McLeod Community College Scholarship
Bernhardt Graduate Award in Music
The Moore Fellowships
Kim and Bradley Hayes Scholarship
Margaret Brown Maron Fund
Mary and David Hagan Dean’s Scholarship
Betty Crawford Ervin History Fellowship
Stephanie Metzger Nursing Scholarship
Ruby Barnes Scholarship Fund
Ross Dickson Scholarship
Carolyn Long Merit Scholarship Program Support
Carolyn Long Merit Scholarship
Kathryn Preyer History Fellowship
Laura B & Christopher C Tew Viola Scholarship Fund
Laura B & Christopher C Tew Physical Science Scholarship Fund
Avren HHP Scholarship
Robinette Meador Husketh Scholarship Fund
Caldwell Teacher Scholarship
Anna Wooten-Hawkins Graduate Award
RHP Class of ’47 Scholarship
Tom Zirker Flute Scholarship
Shamrock Corporation Athletic Scholarship
Happy DuBose “Kenan” Gray Scholarship
Ruth Thompson Scholarship
Boyd A. Rogers Scholarship
Joseph M. Bryan Jr. Arts & Humanities Fellowship
Mary Channing Coleman Fund
Cash Professional Development
Sherri R. Forrester Chemistry Program Fund
Wachovia Teacher Mentoring Network
Elizabeth Payne Leadership Fund
Sadie Dunn Doxie HHP Research Award
Gatewood Exhibition for Weatherspoon Art Museum Fund
Gatewood Art Student Education Fund
Gatewood Academic Equipment Fund
BB&T Capitalism, Markets & Morality Fellowship Endowment
BB&T Capitalism, Markets & Morality Program Fund
Lauren & David Worth Conservation Endowment
Dennis & Betty Barry Jazz Studies Program Endowment
Bob & Lissa Shelly McDowell Research Center Endowment for Global Information Technology
Bob & Lissa Shelly McDowell Gallery Endowment for Weatherspoon Art Museum
Betty Suitt Oakley Travel Fund
Bonnie Angelo MFA Art Program Endowment
Waylon H. Cato Jr. Foundation Scholarships
Ray G. & Nancy Jo Paschall Ledford Scholarship for Students with Physical Impairments
Aline and Alice Spell Scholarship in the Sciences
Mary Sheila Nassif Graduate Award
James L. Roueche & Willard S. Smith Music Endowment for International Students
Daniel Ericourt Piano Artist Residency

Part VI: Outstanding Pledges

As of 2/28/07 balances on outstanding pledges totaled $9,937,542.80. This total excludes pledges to the Annual Fund.
## GIVING BY ENTITY

<table>
<thead>
<tr>
<th>Entity</th>
<th>2006-2007 Fiscal YTD</th>
<th>2005-2006 Fiscal YTD</th>
<th>% Increase/(Decrease)</th>
</tr>
</thead>
<tbody>
<tr>
<td>University</td>
<td>5,092,216.30</td>
<td>3,549,239.44</td>
<td>43.47</td>
</tr>
<tr>
<td>Excellence</td>
<td>6,838,967.45</td>
<td>3,690,584.16</td>
<td>85.31</td>
</tr>
<tr>
<td>HES</td>
<td>110,106.07</td>
<td>107,401.69</td>
<td>2.52</td>
</tr>
<tr>
<td>WGA</td>
<td>156,177.91</td>
<td>113,622.75</td>
<td>37.45</td>
</tr>
<tr>
<td>Alumni Association</td>
<td>90,946.38</td>
<td>68,776.82</td>
<td>32.23</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>12,288,414.11</td>
<td>7,529,624.86</td>
<td>63.20</td>
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## SOURCES OF SUPPORT

### Current/Restricted Gifts of Cash and Equivalents

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Alumni</td>
<td>4,342,843.73</td>
<td>3,838,472.40</td>
<td>13.14</td>
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<tr>
<td>Parents</td>
<td>71,049.14</td>
<td>56,293.46</td>
<td>26.21</td>
</tr>
<tr>
<td>Faculty/Staff</td>
<td>387,632.38</td>
<td>330,605.21</td>
<td>17.25</td>
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<tr>
<td>Friends</td>
<td>4,827,761.41</td>
<td>1,372,273.65</td>
<td>251.81</td>
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<tr>
<td>Corporate</td>
<td>1,108,780.63</td>
<td>863,318.63</td>
<td>28.43</td>
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<tr>
<td>Foundations</td>
<td>1,171,610.27</td>
<td>892,326.82</td>
<td>31.30</td>
</tr>
<tr>
<td>Other Organizations</td>
<td>378,736.55</td>
<td>176,334.69</td>
<td>114.78</td>
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<tr>
<td><strong>Total</strong></td>
<td>12,288,414.11</td>
<td>7,529,624.86</td>
<td>63.20</td>
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### Gifts from Bequests

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<tr>
<td>Alumni</td>
<td>758,877.72</td>
<td>738,951.69</td>
<td>2.70</td>
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<tr>
<td>Faculty/Staff</td>
<td>16,124.45</td>
<td>-</td>
<td>0.00</td>
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<tr>
<td>Friends</td>
<td>1,553,683.25</td>
<td>453,442.68</td>
<td>242.64</td>
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<tr>
<td><strong>Total</strong></td>
<td>2,328,685.42</td>
<td>1,192,394.37</td>
<td>95.29</td>
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### Life Income Gifts

<table>
<thead>
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<tbody>
<tr>
<td>Alumni</td>
<td>772,127.27</td>
<td>1,164,489.00</td>
<td>(33.69)</td>
</tr>
<tr>
<td>Faculty/Staff</td>
<td>93,946.00</td>
<td>-</td>
<td>0.00</td>
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<tr>
<td>Friends</td>
<td>2,156,353.24</td>
<td>-</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>3,022,426.51</td>
<td>1,164,489.00</td>
<td>159.55</td>
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### Gifts from In Kind Contributions

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Alumni</td>
<td>7,889.00</td>
<td>4,787.00</td>
<td>64.80</td>
</tr>
<tr>
<td>Faculty/Staff</td>
<td>129,510.49</td>
<td>4,970.00</td>
<td>2,505.84</td>
</tr>
<tr>
<td>Friends</td>
<td>6,848.15</td>
<td>13,001.05</td>
<td>(47.33)</td>
</tr>
<tr>
<td>Corporate</td>
<td>46,896.30</td>
<td>23,171.49</td>
<td>102.39</td>
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<tr>
<td>Other Organizations</td>
<td>1,104.97</td>
<td>346.35</td>
<td>219.03</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>192,248.91</td>
<td>46,275.89</td>
<td>315.44</td>
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