

BOARD OF TRUSTEES

THE UNIVERSITY OF NORTH CAROLINA AT GREENSBORO

February 15, 2007

INFORMATION ITEM: Report on Private Giving to The University of North Carolina at Greensboro and its Affiliated Organizations, July 1, 2006 – December 31, 2006

BACKGROUND INFORMATION:

Development Report

Part I: Gifts/Dues Received July 1, 2006 – December 31, 2006

Attachment A compares gifts received July 2005 – December 2005 with gifts received July 2006 – December 2006 and denotes a 64.36% increase from the previous year. The attachment shows these comparisons based on **giving by entity** and **sources of support**. Included in this total of \$10,057,057.44 is \$1,690,983.48 in **gifts from bequests**, \$2,949,226.51 in **life income gifts** and \$177,307.87 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 \$9,247,356 through the end of December, a 42.2% increase over 2005/06's total of \$6,501,176.

	<u>2006/07</u> (7/1/06-12/31/06)	<u>2005/06</u> (7/1/05-12/31/05)	Inc/(Dcr)
New Dollars:	\$ 9,247,356	\$ 6,501,176	42.2%

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 these commitments are treated like outright gifts by the University. Documented planned gift expectancies to date totaled \$6,512,700 a 18% 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.

	<u>2006/07</u> (7/1/06-12/31/06)	<u>2005/06</u> (7/1/05-12/31/05)	Inc/(Dcr)
Documented Planned Gifts:	\$ 6,512,700	\$ 7,945,386	(18%)

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 12/31/06:

	<u>2006/07</u> (7/1/06-12/31/06)	<u>2005/06</u> (7/1/05-12/31/05)	Inc/(Dcr)
New Dollars*:	\$ 9,247,356	\$ 6,501,176	42.2%
New Deferred Commitments**:	<u>\$ 6,512,700</u>	<u>\$ 7,945,386</u>	<u>(18%)</u>
	\$15,760,056	\$14,446,562	9%

*New dollars = (gifts received 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 December 31, 2006 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
Martha Fowler McNair Arts & Sciences Endowed
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
 Arts & Sciences Fellowship
 Cash Professional Development
 Sherri R. Forrester Chemistry Program
 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
 Bob & Lissa Shelly McDowell Research Center Endowment for Global Info
 Bob & Lissa Shelly McDowell Gallery Endowment for Weatherspoon Art Museum
 Betty Suitt Oakley Travel Fund
 Bonnie Angelo MFA Art Program Endowment
 Patricia A. & Charles W. Sullivan Scholarship
 Patricia A. & Charles W. Sullivan Chancellor's Discretionary Fund

Part VI: Outstanding Pledges

As of 12/31/06 balances on outstanding pledges totaled \$9,403,020. This total excludes pledges to the Annual Fund.

**THE UNIVERSITY OF NORTH CAROLINA AT GREENSBORO
AND AFFILIATED ORGANIZATIONS**

**Private Gift Support
7/1/2006 thru 012/31/2006**

ATTACHMENT A

GIVING BY ENTITY

Entity	2006-2007 Fiscal YTD		2005-2006 Fiscal YTD	% Increase/(Decrease)
University	3,584,345.58		2,902,934.71	23.47
Excellence	6,171,712.22	#	2,967,025.84	108.01
HES	103,802.73	#	84,758.35	22.47
WGA	114,176.13	#	101,456.75	12.54
Alumni Association*	83,020.78	#	62,811.82	32.17
Total	10,057,057.44		6,118,987.47	64.36

SOURCES OF SUPPORT

Current/Restricted Gifts of Cash and Equivalents

Source of Gifts	2006-2007 Fiscal YTD		2005-2006 Fiscal YTD	% Increase/(Decrease)
Alumni	3,240,763.01		3,420,665.23	(5.26)
Parents	51,936.16	#	45,941.50	13.05
Faculty/Staff	351,180.38	#	173,272.48	102.68
Friends	4,634,945.63		1,088,085.30	325.97
Corporate	528,192.44		588,756.36	(10.29)
Foundations	873,430.27		626,491.86	39.42
Other Organizations	376,609.55		175,774.74	114.26
Total	10,057,057.44		6,118,987.47	64.36

Gifts from Bequests

Source of Gifts	2006-2007 Fiscal YTD		2005-2006 Fiscal YTD	% Increase/(Decrease)
Alumni	134,783.10		722,829.69	(81.35)
Faculty/Staff	16,124.45		-	0.00
Friends	1,540,075.93		411,682.26	274.09
Total	1,690,983.48		1,134,511.95	49.05

Life Income Gifts

Source of Gifts	2006-2007 Fiscal YTD		2005-2006 Fiscal YTD	% Increase/(Decrease)
Alumni	698,927.27		869,489.00	(19.62)
Faculty/Staff	93,946.00		-	0.00
Friends	2,156,353.24		-	0.00
Total	2,949,226.51		869,489.00	239.19

Gifts from In Kind Contributions

Source of Gifts	2006-2007 Fiscal YTD	2005-2006 Fiscal YTD	% Increase/(Decrease)
Alumni	7,538.00	4,287.00	75.83
Faculty/Staff	129,510.49	4,970.00	2,505.84
Friends	6,348.15	8,501.05	(25.33)
Corporate	32,806.26	13,217.64	148.20
Other Organizations	<u>1,104.97</u>	<u>306.40</u>	<u>260.63</u>
Total	<u><u>177,307.87</u></u>	<u><u>31,282.09</u></u>	<u><u>466.80</u></u>