

BOARD OF TRUSTEES

THE UNIVERSITY OF NORTH CAROLINA AT GREENSBORO

November 2, 2006

INFORMATION ITEM: Report on Private Giving to The University of North Carolina at Greensboro and its Affiliated Organizations, July 1, 2006 – September 30, 2006

BACKGROUND INFORMATION:

Development Report

Part I: Gifts/Dues Received July 1, 2006 – September 30, 2006

Attachment A compares gifts received July 2005 – September 2005 with gifts received July 2006 – September 2006 and denotes a 90.52% increase from the previous year. The attachment shows these comparisons based on **giving by entity** and **sources of support**. Included in this total of \$4,234,449.28 is \$61,142.17 in **gifts from bequests**, \$2,375,000.00 in **life income gifts** and \$19,281.77 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 \$3,784,136 through the end of September, a 34% increase over 2005/06's total of \$2,815,858.

	<u>2006/07</u> (7/1/06-9/30/06)	<u>2005/06</u> (7/1/05-9/30/05)	Inc/(Dcr)
New Dollars:	\$ 3,784,136	\$ 2,815,858	34%

Part III. Documented Planned Gift Commitments

A complete picture of the University's development activity also 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. 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 \$510,700 an 86% decrease from last year's total of \$3,585,886. The following chart compares documented planned gift expectancies generated in 2006/07 with 2005/06.

	<u>2006/07</u> (7/1/06-9/30/06)	<u>2005/06</u> (7/1/05-9/30/05)	Inc/(Dcr)
Documented Planned Gifts:	\$ 510,700	\$ 3,585,886	(86%)

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 9/30/06:

	<u>2006/07</u> (7/1/06-9/30/06)	<u>2005/06</u> (7/1/05-9/30/05)	Inc/(Dcr)
New Dollars*:	\$3,784,136	\$ 2,815,858	34%
New Deferred Commitments**:	<u>\$ 510,700</u>	<u>\$ 3,585,886</u>	<u>(86%)</u>
	\$4,294,836	\$ 6,401,744	(33%)

*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 September 30, 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

Part VI: Outstanding Pledges

As of 9/30/06 balances on outstanding pledges totaled \$12,225,861. This total excludes pledges to the Annual Fund.

Attachment A

**THE UNIVERSITY OF NORTH CAROLINA AT GREENSBORO
AND AFFILIATED ORGANIZATIONS
Private Gift Support
7/1/2006 thru 09/30/2006
AND AFFILIATED ORGANIZATIONS
GIVING BY ENTITY**

Entity	2006-2007 Fiscal YTD	2005-2006 Fiscal YTD	% Increase/(Decrease)
University	1,311,832.73	717,515.28	82.83
Excellence	2,852,366.72	# 1,408,896.12	102.45
HES	18,043.47	# 26,533.84	(32.00)
WGA	31,513.55	# 49,193.06	(35.94)
Alumni Association*	20,692.81	# 20,479.93	1.04
Total	<u>4,234,449.28</u>	<u>2,222,618.23</u>	<u>90.52</u>

SOURCES OF SUPPORT

Current/Restricted Gifts of Cash and Equivalents

Source of Gifts	2006-2007 Fiscal YTD	2005-2006 Fiscal YTD	% Increase/(Decrease)
Alumni	793,875.77	972,468.29	(18.36)
Parents	8,866.16	# 3,930.00	125.60
Faculty/Staff	77,699.01	# 67,323.42	15.41
Friends	2,208,853.34	531,478.93	315.61
Corporate	361,746.36	259,123.85	39.60
Foundations	435,608.64	216,629.00	101.09
Other Organizations	347,800.00	171,664.74	102.60
Total	<u>4,234,449.28</u>	<u>2,222,618.23</u>	<u>90.52</u>

Gifts from Bequests

Source of Gifts	2006-2007 Fiscal YTD	2005-2006 Fiscal YTD	% Increase/(Decrease)
Alumni	16,656.50	87,872.03	(81.04)
Faculty/Staff	9,787.45	-	0.00
Friends	34,698.22	392,267.26	(91.15)
Total	<u>61,142.17</u>	<u>480,139.29</u>	<u>(87.27)</u>

Life Income Gifts

Source of Gifts	2006-2007 Fiscal YTD	2005-2006 Fiscal YTD	% Increase/(Decrease)
Alumni	375,000.00	667,000.00	(43.78)
Faculty/Staff	-	-	0.00
Friends	2,000,000.00	-	0.00
Total	<u>2,375,000.00</u>	<u>667,000.00</u>	<u>256.07</u>

Gifts from In Kind Contributions

Source of Gifts	2006-2007 Fiscal YTD	2005-2006 Fiscal YTD	% Increase/(Decrease)
Alumni	1,428.00	-	0.00
Faculty/Staff	-	4,970.00	(100.00)
Friends	1,484.59	3,678.50	(59.64)
Corporate	16,369.18	9,001.63	81.85
Other Organizations	-	306.40	(100.00)
Total	<u>19,281.77</u>	<u>17,956.53</u>	<u>7.38</u>