

**BOARD OF TRUSTEES****THE UNIVERSITY OF NORTH CAROLINA AT GREENSBORO**

February 19, 2009

**INFORMATION ITEM:** Report on Private Giving to The University of North Carolina at Greensboro and its Affiliated Organizations, July 1, 2008 – December 31, 2008

**BACKGROUND INFORMATION:**

Development Report

**Part I: Gifts/Dues Received July 1, 2008 – December 31, 2008**

*Attachment A* compares gifts received July 2007 – June 2008 with gifts received July 2008 – June 2009 and denotes a 26.44% decrease from the previous year. The attachment shows these comparisons based on **giving by entity** and **sources of support**. Included in this total of \$6,335,230.22 is \$359,130.31 in **gifts from bequests**, \$451,029.45 in **life income gifts** and \$102,206.38 in **gifts from in kind contributions**.

**Part II: New Dollars**

New dollar commitments (i.e. receipted gifts that do not represent commitments on pledges made prior to the beginning of 2008-09, plus new pledges for future commitments, plus corporate matches of the gifts of their employees) totaled \$4,500,858 through the end of June, a 31.8% decrease from 2007/08's total of \$6,598,179.

	<u>2008/09</u> (7/1/08-12/31/08)	<u>2007/08</u> (7/1/07-12/31/07)	Inc/(Dcr)
New Dollars:	\$ 4,500,858	\$ 6,598,179	(31.8) %

**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 \$1,206,000 a 69.4% decrease over last year's total of \$3,943,044. The following chart compares documented planned gift expectancies generated in 2008/09 with 2007/08.

	<u>2008/09</u> (7/1/08-12/31/08)	<u>2007/08</u> (7/1/07-12/31/07)	Inc/(Dcr)
Documented Planned Gifts:	\$ 1,206,000	\$ 3,943,044	(69.4) %

#### **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 12/31/08:

	<u>2008/09</u> (7/1/08-12/31/08)	<u>2007/08</u> (7/1/07-12/31/07)	Inc/(Dcr)
New Dollars*:	\$ 4,500,858	\$ 6,598,179	(31.8) %
New Deferred Commitments**:	<u>\$ 1,206,000</u>	<u>\$ 3,943,044</u>	<u>(69.4) %</u>
	\$ 5,706,858	\$ 10,541,223	(45.9) %

\*New dollars = (gifts received in 2008/09) + (pledges for future commitments) + (corporate matching gifts) – (payments made in 2007/08 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, Human Environmental Sciences Foundation and UNCG between July 1, 2008 and December 31, 2008 include:

Mary Motsinger Evans Scholarship Fund  
 Finance Student Award Fund  
 Amy Myers Rudd Scholarship Fund  
 Joan Foster and Peter Allan Communications Fellows Program Fund  
 Blanche Rigsby Shore Scholarship in Nursing  
 Nita Parker Brogdon Scholarship Fund  
 Diane Griffin Chemistry Scholarship Fund  
 Constance Childers Graduate Scholarship in Library and Information Studies  
 Phil and Peggy Link Art Fund  
 Maria Eulalia Donoso Conde International Student Scholarship  
 Doug Hamilton Athletic Scholarship Fund  
 Greek Leadership Endowment Fund  
 Sandra D. Reed Merit Scholarship in Nursing  
 Temple Family Fund  
 Cynthia Fowler Barnes Scholarship in Business  
 ARC of Greensboro Special Education Scholarship Endowed Fund  
 Dilys Bass Stowell Scholarship in the College of Arts & Sciences

John Rothkopf Scholarship in Hospitality Management  
Barbara Reynolds Todd Scholarship  
Kristina Larson Graduate Dance Fund  
Tom and Marilou May Scholarship Fund

**Part VI:**                    **Outstanding Pledges**

As of 12/31/08 balances on outstanding pledges totaled \$8,071,358. This total excludes pledges to the Annual Fund.

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

**Private Gift Support  
7/1/2008 thru 12/31/2008**

**GIVING BY ENTITY**

**ATTACHMENT A**

Entity	2008-2009 Fiscal YTD	2007-2008 Fiscal YTD	% Increase/(Decrease)
University	4,090,072.20	5,718,987.95	(28.48)
Excellence	2,038,772.98	2,622,105.82	(22.25)
HES	75,302.40	156,683.85	(51.94)
WGA	122,407.84	94,535.49	29.48
Alumni Association*	8,674.80	20,414.96	(57.51)
<b>Total</b>	<b>6,335,230.22</b>	<b>8,612,728.07</b>	<b>(26.44)</b>

**SOURCES OF SUPPORT**

**Current/Restricted Gifts of Cash and Equivalents**

Source of Gifts	2008-2009 Fiscal YTD	2007-2008 Fiscal YTD	% Increase/(Decrease)
Alumni	2,940,390.55	2,526,443.87	16.38
Parents	27,192.55	55,296.40	(50.82)
Faculty/Staff	120,016.48	1,073,142.87	(88.82)
Friends	1,049,935.87	1,468,702.63	(28.51)
Corporate	413,267.60	1,154,561.17	(64.21)
Foundations	926,077.17	1,805,427.03	(48.71)
Other Organizations	858,350.00	529,154.10	62.21
<b>Total</b>	<b>6,335,230.22</b>	<b>8,612,728.07</b>	<b>(26.44)</b>

**Gifts from Bequests**

Source of Gifts	2008-2009 Fiscal YTD	2007-2008 Fiscal YTD	% Increase/(Decrease)
Alumni	231,140.73	46,409.59	398.05
Faculty/Staff	-	1,200.00	(100.00)
Friends	107,989.58	784,196.54	(86.23)
<b>Total</b>	<b>339,130.31</b>	<b>831,806.13</b>	<b>(59.23)</b>

**Life Income Gifts**

Source of Gifts	2008-2009 Fiscal YTD	2007-2008 Fiscal YTD	% Increase/(Decrease)
Alumni	451,029.45	188,252.33	139.59
Faculty/Staff	-	250,000.00	(100.00)
Friends	-	25,000.00	(100.00)
<b>Total</b>	<b>451,029.45</b>	<b>463,252.33</b>	<b>(2.64)</b>

**Gifts from In Kind Contributions**

Source of Gifts	2008-2009 Fiscal YTD	2007-2008 Fiscal YTD	% Increase/(Decrease)
Alumni	5,000.00	1.00	499,900.00
Faculty/Staff	-	-	0.00
Friends	90,180.81	832.45	10,733.18
Corporate	7,025.57	20,812.74	(66.24)
Other Organizations	-	73.00	(100.00)
<b>Total</b>	<b>102,206.38</b>	<b>21,719.19</b>	<b>370.58</b>