

**BOARD OF TRUSTEES**

**THE UNIVERSITY OF NORTH CAROLINA AT GREENSBORO**

May 3, 2012

INFORMATION ITEM: Report on Private Giving to The University of North Carolina at Greensboro and its Affiliated Organizations, July 1, 2011 – February 29, 2012

BACKGROUND INFORMATION:

Development Report

**Part I: Gifts/Dues Received July 1, 2011 – February 29, 2012**

*Attachment A* compares gifts received July 2010 – February 2011 with gifts received July 2011 – February 2012 and denotes a 2.20% decrease from the previous year. The attachment shows these comparisons based on **giving by entity** and **sources of support**. Included in this total of \$5,650,204.26 is \$1,290,704.89 in **gifts from bequests**, \$341,722.49 in **life income gifts** and \$94,796.61 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 2011-12, plus new pledges for future commitments, plus corporate matches of the gifts of their employees) totaled \$4,757,652 through the end of February, a 21% increase from 2010/11's total of \$3,931,190.

	<u>2011/12</u> (7/1/11-2/29/12)	<u>2010/11</u> (7/1/10- 2/28/11)	Inc/(Dcr)
New Dollars:	\$ 4,757,652	\$ 3,931,190	21%

**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 \$4,136,702 an 80.4% increase over last year's total of \$2,292,750. The following chart compares documented planned gift expectancies generated in 2011/12 with 2010/11.

	<u>2011/12</u> (7/1/11 – 2/29/12)	<u>2010/11</u> (7/1/10- 2/28/11)	Inc/(Dcr)
Documented Planned Gifts:	\$ 4,136,702	\$ 2,292,750	80.4 %

#### **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 2/29/2012:

	<u>2011/12</u> (7/1/11-2/29/12)	<u>2010/11</u> (7/1/10- 2/28/11)	Inc/(Dcr)
New Dollars*:	\$ 4,757,652	\$ 3,931,190	21%
New Deferred Commitments**:	<u>\$ 4,136,702</u>	<u>\$ 2,292,750</u>	<u>80.4%</u>
	\$ 8,894,354	\$ 6,223,940	42.9%

\*New dollars = (gifts received in 2011/12) + (pledges for future commitments) + (corporate matching gifts) – (payments made in 2011/12 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, 2011 and February 29, 2012 include:

James Sterling & Patsie Lee Clark Endowed Scholarship Fund  
 Evon Welch Dean Alumni Merit Scholarship Endowed Fund  
 Edward M. Armfield Sr. Endowed Scholarship Fund for Nurse Practitioners  
 Emmalen M. Smith Scholarship Endowed Fund  
 Becky Jackson UNCG Guarantee Scholarship Fund  
 Katheryne Levis McCormick Scholarship Fund  
 May Davidson Scholarship Fund  
 Hannah Steele Brownell Scholarship Endowed Fund  
 Silvio and Gale Bedini Professional Development Endowed Fund  
 Deborah Jamieson Interior Architecture Endowed Fund

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

As of 2/29/2012 balances on outstanding pledges totaled \$3,724,349. This total excludes pledges to the Annual Fund.

<b>THE UNIVERSITY OF NORTH CAROLINA AT GREENSBORO AND AFFILIATED ORGANIZATIONS</b>			
<b>Private Gift Support</b>			
<b>7/1/2011 thru 2/29/2012</b>			
<b>GIVING BY ENTITY</b>			
<b>ATTACHMENT A</b>			
Entity	2011-2012 Fiscal YTD	2010-2011 Fiscal YTD	% Increase/(Decrease)
University	3,633,589.29	2,427,037.01	49.71
Excellence	1,831,979.49	3,007,726.08	(39.09)
HES	38,227.77	85,858.80	(55.48)
WGA	130,622.37	249,294.21	(47.60)
Alumni Association	15,785.34	7,585.47	108.10
<b>Total</b>	<b>5,650,204.26</b>	<b>5,777,501.57</b>	<b>(2.20)</b>
<b>SOURCES OF SUPPORT</b>			
<b>Current/Restricted Gifts of Cash and Equivalents</b>			
Source of Gifts	2011-2012 Fiscal YTD	2010-2011 Fiscal YTD	% Increase/(Decrease)
Alumni	2,155,000.42	1,533,120.88	40.56
Parents	33,822.19	42,635.57	(20.67)
Faculty/Staff	168,537.33	279,717.39	(39.75)
Friends	1,035,086.90	1,880,705.07	(44.96)
Corporate	587,825.68	810,285.47	(27.45)
Foundations	1,017,125.84	1,001,387.19	1.57
Other Organizations	652,805.90	229,650.00	184.26
<b>Total</b>	<b>5,650,204.26</b>	<b>5,777,501.57</b>	<b>(2.20)</b>
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<b>Gifts from Bequests</b>			
Source of Gifts	2011-2012 Fiscal YTD	2010-2011 Fiscal YTD	% Increase/(Decrease)
Alumni	952,302.22	146,510.84	549.99
Faculty/Staff	0.00	7,674.99	(100.00)
Friends	338,402.67	130,000.00	160.31
<b>Total</b>	<b>1,290,704.89</b>	<b>284,185.83</b>	<b>354.18</b>
<b>Life Income Gifts</b>			
Source of Gifts	2011-2012 Fiscal YTD	2010-2011 Fiscal YTD	% Increase/(Decrease)
Alumni	266,722.49	393,175.34	(32.16)
Faculty/Staff	75,000.00	25,000.00	200.00
Friends	-	100,000.00	(100.00)
<b>Total</b>	<b>341,722.49</b>	<b>518,175.34</b>	<b>(34.05)</b>
<b>Gifts from In Kind Contributions</b>			
Source of Gifts	2011-2012 Fiscal YTD	2010-2011 Fiscal YTD	% Increase/(Decrease)
Alumni	4,001.00	1,378.25	190.30
Faculty/Staff	629.31	5,728.00	(89.01)
Friends	71,513.94	116,316.79	(38.52)
Corporate	18,391.46	15,095.80	21.83
Other Organizations	260.90	1,121.21	(76.73)
<b>Total</b>	<b>94,796.61</b>	<b>139,640.05</b>	<b>(32.11)</b>

**ACTION: Information**