

University Advancement Presentation to UNCG Board of Trustees

Judy Piper
Interim Vice Chancellor
August 7, 2012

Agenda

1. Internal Assessment
2. Proposed Reports
3. FY13 Focus
 - ✓ Strategies to Increase Participation & Giving
 - ✓ Data & Infrastructure
4. FY13 Goal & Goal Setting Process

Internal Assessment

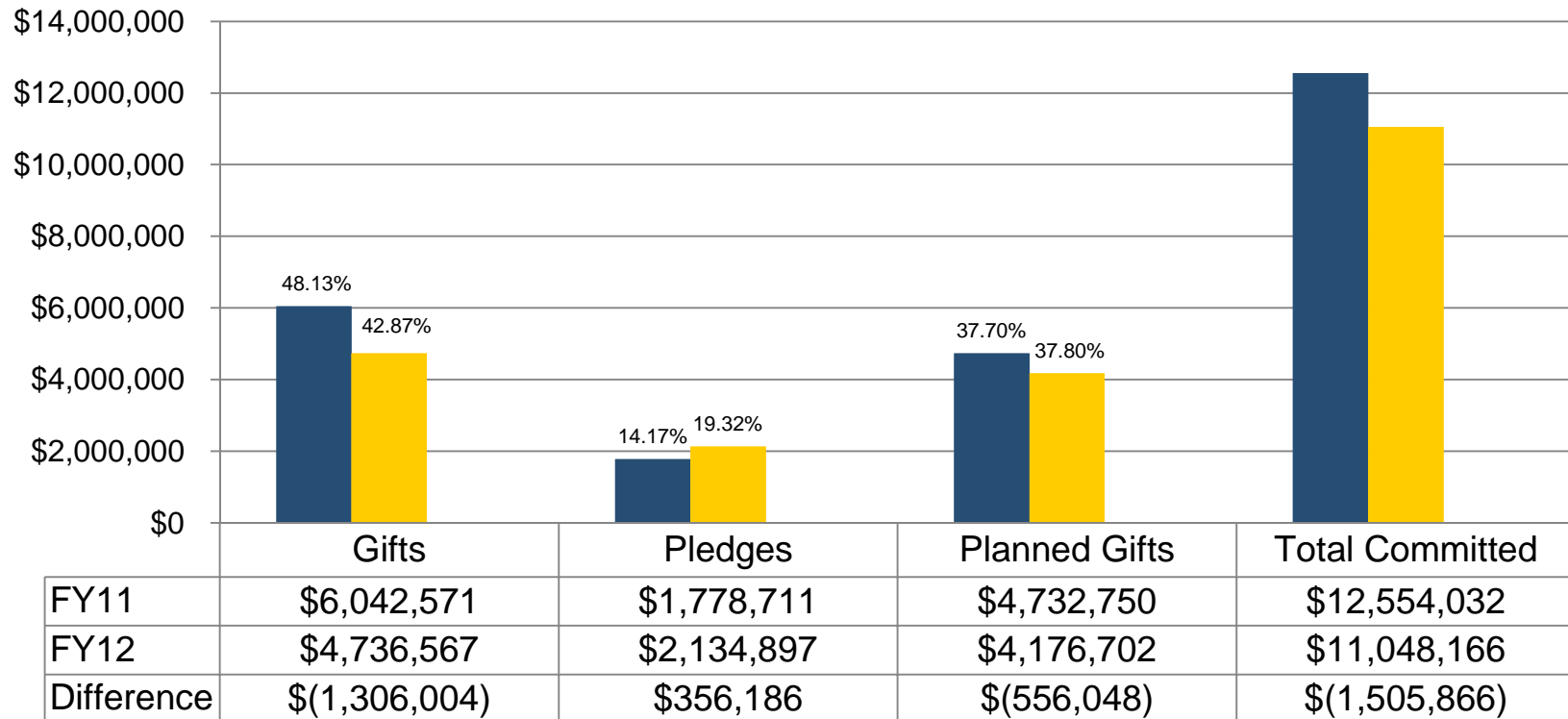
- Strength
 - Planned Giving
- Areas of Opportunity
 - Corporate & Foundation Giving
 - Major Gifts
 - Alumni Participation
 - Advancement Services

Proposed Reports

1. New Commitment Results and % to Goal
2. Giving, Alumni Participation, Donor and Gift Counts
3. New Commitments by Category
4. Gifts Received

Development Results as of June 30, 2012

New Commitments



Total Committed	Goal	% of Goal
\$12,554,032	\$12,000,000	104.62%
\$11,048,166	\$10,000,000	110.48%

New Commitments as of June 30, 2012

Giving, Alumni Participation & Donor and Gift Counts

Giving	June 30, 2011	% of total giving	June 30, 2012	% of total giving
Total Giving	\$12,554,032		\$11,048,166	
Chancellor's Unrestricted (Annual Fund-current gifts)	\$227,948	1.82%	\$180,206	1.63%
Annual Giving (gifts < \$15,000)	\$2,369,445	18.87%	\$2,559,339	23.17%
Corporations and Foundations (includes contracts & grants)	\$1,736,731	13.83%	\$1,710,953	15.49%

Alumni Participation	June 30, 2011	June 30, 2012
Alumni Participation (undergraduates with solicitation exclusions)	6.62%	7.33%
Alumni Participation per VSE	4.33%	4.5%

Donor and Gift Counts	June 30, 2011	June 30, 2012	Change	% Change
Total Individual Donors (excludes Corporations & Foundations)	6,485	7,422	937	14.4%
Total Number of Gifts (includes Corporations & Foundations)	8,613	9,182	569	6.6%

New Commitments by Category as of June 30, 2012

Category	Gifts	Pledges	Planned Gifts	Total
Current Spending	\$1,563,420	\$1,349,633	\$26,702	\$2,939,756
Endowment	\$2,471,897	\$785,263	\$4,150,000	\$7,407,160
Contracts and Grants	\$695,130	\$0	\$0	\$695,130
Other	\$6,120	\$0	\$0	\$6,120
Grand Total	\$4,736,567	\$2,134,897	\$4,176,702	\$11,048,166

**THE UNIVERSITY OF NORTH CAROLINA AT GREENSBORO
AND AFFILIATED ORGANIZATIONS
Gifts Received
7/1/2011 thru 6/30/2012**

Gifts by Entity			
Entity	2011-2012 Fiscal YTD	2010-2011 Fiscal YTD	% Increase/(Decrease)
University	5,418,488.27	4,921,715.99	10.09
Excellence	2,704,406.63	4,967,456.40	(45.56)
HES	44,073.69	154,426.46	(71.46)
WGA	175,642.12	337,273.58	(47.92)
Alumni Association	18,092.02	11,506.47	57.23
Total	8,360,702.73	10,392,378.90	(19.55)
Gifts by Donor Type			
Source of Gifts	2011-2012 Fiscal YTD	2010-2011 Fiscal YTD	% Increase/(Decrease)
Alumni	3,577,297.81	3,288,175.74	8.79
Parents	50,912.63	53,788.77	(5.35)
Faculty/Staff	224,850.37	373,370.92	(39.78)
Friends	1,230,137.06	3,256,294.68	(62.22)
Corporate	809,700.05	1,027,591.24	(21.20)
Foundations	1,793,580.96	1,960,237.28	(8.50)
Other Organizations	674,223.85	432,920.27	55.74
Total	8,360,702.73	10,392,378.90	(19.55)
Gifts from Bequests*			
Source of Gifts	2011-2012 Fiscal YTD	2010-2011 Fiscal YTD	% Increase/(Decrease)
Alumni	1,649,798.64	1,077,877.40	53.06
Faculty/Staff	13,894.35	7,674.99	81.03
Friends	338,664.75	148,789.00	127.61
Total	2,002,357.74	1,234,341.39	62.22
Life Income Gifts*			
Source of Gifts	2011-2012 Fiscal YTD	2010-2011 Fiscal YTD	% Increase/(Decrease)
Alumni	421,792.39	708,175.34	(40.44)
Faculty/Staff	75,000.00	25,000.00	200.00
Friends	-	1,200,000.00	(100.00)
Total	496,792.39	1,933,175.34	(74.30)
Gifts from In Kind Contributions*			
Source of Gifts	2011-2012 Fiscal YTD	2010-2011 Fiscal YTD	% Increase/(Decrease)
Alumni	4,771.76	10,631.12	(55.12)
Faculty/Staff	650.31	5,728.00	(88.65)
Friends	75,447.72	169,626.79	(55.52)
Corporate	31,643.31	22,914.84	38.09
Other Organizations	328.85	1,518.21	(78.34)
Total	112,841.95	210,418.96	(46.37)
*Included in Fiscal YTD Totals			

Plans to Increase Participation & Giving

- Principal Gifts
- Endowment Level Change
- Complete & Total Asks
- Solicit completed multi-year pledges
- Planned giving website & direct mail
- Mini-campaign opportunities
 - Dean Pearcey retirement
 - Moran naming, etc.

Plans to Increase Participation & Giving (continued)

- Telefund calls in Summer
- Reoccurring Giving
- Targeted solicitations (new reporting tool)
- Qualification Summer Blitz
- Solicitation of Chancellor development event attendees
- Social media pilot
- Annual Giving piece provided at every visit

Data & Infrastructure

- Data
 - Integrity
 - Enhancement
 - Reporting
- Infrastructure
 - Staff Audit

Fundraising Goal

- Goal
 - \$xx,xxx,xxx
- Stretch Goal
 - \$yy,yyy,yyy

Goal Setting Process

1. Comprehensive review by all gift officers
 - Review list of potential donors; estimate activity and new commitments
2. Campaign Director calculates three formulas for comparison
 - Projections by Staff (includes new plans)
 - 25% of total asks, verbals, and solicitations planned
 - Rolling 36-month average monthly total
3. Vice Chancellor recommends goal to Chancellor