

University of North Carolina Development Update

BOG Budget and Finance Committee



November 8, 2012

Presentation Outline

- **Total Support by Campus by Source**
- **Total Gifts by Campus**
- **Endowment Value by Campus**
- **Development Budget and Staffing by Campus**
- **Advancement Initiatives**
- **Discussion**



Total Support by Campus & Source 2010-11

- Includes both gifts and pledges
- Excludes payments on pledges from previous years
- Support shown in seven (7) major segments of private giving
- 9.32% growth from 2009-10 to 2010-11 in total support



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Total Gifts and Pledges by Source 2010-11

Campus	Alumni	Parents	Faculty/ Staff	Other Individuals	Corps.	Foundations	Other Orgs.	Total
ASU	\$7,125,896	\$774,675	\$141,409	\$7,999,893	\$4,220,893	\$1,710,782	\$2,623,068	\$24,596,616
ECU	10,127,786	53,270	958,148	3,260,049	4,695,292	3,607,115	836,509	23,538,169
ECSU	706,102	450	17,878	123,368	925,085	1,250,169	14,125	3,037,177
FSU	234,169	3,589	33,359	109,542	326,570	154,746	503,891	1,365,866
NCA&T	387,111	260	33,741	106,781	1,400,179	1,478,138	367,124	3,773,334
NCCU	2,820,162	400	123,445	708,702	1,128,895	617,006	1,743,982	7,142,592
NCSU	53,932,987	182,934	2,175,217	10,623,943	20,992,250	10,494,514	8,451,487	106,853,332
UNCA	198,784	84,933	27,431	484,437	343,119	325,691	176,928	1,641,323
UNC-CH	78,469,518	4,196,761	2,504,631	41,047,674	28,277,917	86,116,319	64,951,966	305,564,786
UNCC	1,990,668	114,396	563,189	4,852,027	7,562,410	679,600	554,297	16,316,587
UNCG	5,368,637	95,363	296,581	4,205,114	690,737	1,464,519	433,080	12,554,031
UNCP	102,872	3,125	78,597	122,085	236,872	285,716	96,202	925,469
UNCW	3,817,184	589,057	125,712	2,132,660	1,926,413	940,618	812,219	10,343,863
UNCSA	76,627	104,235	113,176	821,172	403,338	2,643,698	2,304,500	6,466,746
WCU	1,480,187	22,795	0	1,908,547	788,855	550,867	154,592	4,905,843
WSSU	370,982	550	61,136	175,549	579,152	629,426	98,330	1,915,125
NCSSM	571,859	170,951	14,102	181,991	65,744	24,000	2,692	1,031,339
TOTAL	167,781,531	6,397,744	7,267,752	78,863,534	74,563,721	112,972,924	84,124,992	531,972,198



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Source: Campus Reports

Total Gifts by Campus

- Data includes all cash *received*
- Data excludes pledges
- Totals vary over time and across the system
 - Highest: \$511,947,036 (2007)
 - Most recent: \$478,169,797 (2011)
 - Amounts range from \$1M to \$274M



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Total Gifts by Campus 2006-07 – 2010-11

Campus	2006-07	2007-08	2008-09	2009-10	2010-11
ASU	\$12,406,386	\$24,688,244	\$12,437,300	\$12,400,748	\$16,435,408
ECU	21,590,397	29,911,333	30,207,875	22,820,737	24,005,166
ECSU	954,002	2,564,251	2,388,053	1,669,978	2,011,998
FSU	1,305,089	1,633,110	1,337,465	1,591,323	1,309,402
NCA&T	9,051,843	10,097,427	7,890,145	4,005,107	4,344,684
NCCU	4,423,821	7,045,574	7,865,938	6,232,850	4,978,172
NCSU	162,351,776	–	89,685,060	77,963,313	94,756,666
UNCA	3,218,946	4,588,141	9,238,045	3,164,556	3,367,144
UNC-CH	246,864,455	292,389,028	270,111,159	266,857,424	274,947,462
UNCC	11,076,547	–	8,020,725	10,418,968	13,231,759
UNCG	16,382,543	16,179,261	17,557,585	14,400,923	13,680,620
UNCP	1,243,825	2,919,082	2,800,411	1,967,465	1,779,033
UNCW	7,075,658	10,222,577	6,674,594	5,868,414	8,215,987
UNCSA	4,955,015	4,950,023	5,761,894	3,347,928	6,123,936
WCU	5,186,033	4,191,260	3,951,412	3,147,483	4,581,754
WSSU	3,860,700	3,836,628	3,560,121	2,996,216	3,369,267
NCSSM	–	758,150	947,236	959,343	1,031,339
TOTAL	511,947,036	415,215,939	479,487,782	439,812,776	478,169,797



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Source: Voluntary Support of Education (VSE)

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Total Gifts with Peer Data ***(includes both public & private peers)***

- **Campuses that are in the 50th percentile or greater include:**
 - **ASU, ECU, ECSU, NCCU, UNCA, WCU, and WSSU**



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Total Gifts with Peer Data ***(includes both public & private peers)***

<i>UNC Total Gifts</i>		<i>Peer Comparison</i>		
Campus	2010-11	75th Percentile	50th Percentile	25th Percentile
ASU	\$16,435,408	\$8,977,754	\$5,369,070	\$3,753,827
ECU	24,005,166	47,432,009	21,469,466	12,699,474
ECSU	2,011,998	3,348,388	2,000,421	1,296,389
FSU	1,309,402	3,668,048	1,972,556	1,157,031
NCA&T	4,344,684	25,855,262	9,750,431	6,378,583
NCCU	4,978,172	5,737,155	3,793,851	1,924,902
NCSU	94,756,666	188,295,536	114,709,469	94,345,520
UNCA	3,367,144	5,429,959	3,179,186	1,798,903
UNC-CH	274,947,462	408,720,605	315,767,513	222,392,415
UNCC	13,231,759	30,899,178	15,257,231	10,502,639
UNCG	13,680,620	42,268,852	16,848,220	12,688,355
UNCP	1,779,033	6,006,926	2,498,604	1,779,033
UNCW	8,215,987	17,951,298	8,977,754	5,447,203
UNCSA	6,123,936	399,857,527	223,805,332	24,614,890
WCU	4,581,754	8,051,823	4,255,898	3,339,399
WSSU	3,369,267	2,722,063	1,154,610	779,889



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Source: Voluntary Support of Education (VSE)

Total Gifts with Peer Data (includes only public peers)

<i>UNC Total Gifts</i>				
Campus	2010-11	75th Percentile	50th Percentile	25th Percentile
NCCU *	\$ 4,978,172	\$ 5,737,155	\$ 3,793,851	\$ 1,924,902
UNCA	3,367,144	3,909,033	2,662,646	1,743,881
UNC-CH	274,947,462	344,696,010	279,147,147	139,901,970
UNCSA	6,123,936	384,684,632	109,758,582	6,292,848
WSSU *	3,369,267	2,722,063	1,154,610	779,889

**The private peers for two campuses did not report data and therefore the percentiles did not change.*

Source: Voluntary Support of Education (VSE)



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Endowment Value 2010-11

- Endowment values ranged from \$4.2M to \$2.2B
- From 2009-10 to 2010-11, endowments grew between 7.6% and 32.4%
- Campuses that are in the 50% percentile or greater include:
 - ASU, FSU, NCCU, UNCA, UNCG, UNCW, WCU, and WSSU



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Endowment Value

June 30, 2011

Campus	Endowment Market Value	% Growth from 2009-10 to 2010-11	Enrollment Total Headcount	Endowment Per Student
ASU	\$69,551,090	23.9%	17,222	\$4,039
ECU	130,499,264	32.4%	27,783	4,697
ECSU	4,286,497	21.6%	3,307	1,296
FSU	15,081,445	11.3%	5,930	2,543
NCA&T	29,386,073	23.2%	10,795	2,722
NCCU	30,240,556	14.1%	8,645	3,498
NCSU	617,632,000	22.8%	34,376	17,967
UNCA	27,806,574	16.4%	3,792	7,333
UNC-CH	2,239,229,354	14.1%	29,137	76,852
UNCC	136,207,642	7.8%	25,063	5,435
UNCG	204,556,778	19.8%	17,397	11,758
UNCP	15,194,415	28.7%	6,944	2,188
UNCW	64,150,261	18.0%	13,071	4,908
UNCSA	28,694,934	28.1%	1,141	25,149
WCU	45,756,670	24.0%	9,361	4,888
WSSU	23,380,562	7.6%	6,333	3,692
NCSSM	5,070,000	16.0%	680	7,456

Source: Voluntary Support of Education (VSE)



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Endowment Value with Peer Data

(includes both public & private peers)

Endowment Market Value		Peer Comparison
Campus	2010-11	50th Percentile
ASU	\$69,551,090	\$49,773,726
ECU	130,499,264	190,700,839
ECSU	4,286,497	10,880,223
FSU	15,081,445	13,514,000
NCA&T	29,386,073	77,744,151
NCCU	30,240,556	30,240,556
NCSU	617,632,000	931,954,742
UNCA	27,806,574	16,979,274
UNC-CH	2,239,229,354	2,937,250,000
UNCC	136,207,642	136,237,161
UNCG	204,556,778	153,206,825
UNCP	15,194,415	18,289,128
UNCW	64,150,261	57,885,888
UNCSA	28,694,934	1,828,875,163
WCU	45,756,670	37,000,000
WSSU	23,380,562	18,693,042

25th and 75th percentile amounts are not available due to large number of non-reporting peers.

Source: Voluntary Support of Education (VSE)



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Endowment Value with Peer Data (includes only public peers)

<i>Endowment Market Value</i>		<i>Peer Comparison (Public Only)</i>
Campus	2010-11	50th Percentile
NCCU *	\$ 30,240,556	\$ 30,240,556
UNCA	27,806,574	14,899,004
UNC-CH	2,239,229,354	2,592,752,163
UNCSA	28,694,934	1,004,000,000
WSSU *	23,380,562	18,693,042

***The private peers for two campuses did not report data and therefore the 50th percentile did not change.**

25th and 75th percentile amounts are not available due to large number of non-reporting peers.

Source: Voluntary Support of Education (VSE)



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Development Budget & Staffing by Campus – 2010-11

Campus	Total Gift Receipts	Total Number (FTE) of Development Staff	Total Development Specific Budget	Dollars Raised per \$1.00 Invested
ASU	\$16,435,408	32.50	\$3,057,754	\$5.37
ECU	24,005,166	26.50	3,750,000	6.40
ECSU	2,011,998	7.00	678,621	2.96
FSU	1,309,402	12.00	841,369	1.56
NCA&T	4,344,684	23.00	2,284,261	1.90
NCCU	4,978,172	24.00	1,700,000	2.93
NCSU	94,756,666	112.00	6,922,490	13.69
UNCA	3,367,144	9.75	1,052,424	3.20
UNC-CH	274,947,462	211.00	26,900,000	10.22
UNCC	13,231,759	22.80	2,246,266	5.89
UNCG	13,680,620	44.00	5,073,835	2.70
UNCP	1,779,033	7.00	865,529	2.06
UNCW	8,215,987	33.75	1,752,870	4.69
UNCSA	6,123,936	8.40	741,021	8.26
WCU	4,581,754	24.00	1,194,255	3.84
WSSU	3,369,267	19.00	506,552	6.65
NCSSM	1,031,339	3.20	218,803	4.71
TOTAL	478,169,797	619.90	59,786,050	5.12



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Source: Campus Reports

Advancement Initiatives

- **System-wide capacity building**
 - Campus consultation
 - Planned giving shared staff (until 2009)
 - Training for volunteer leadership
 - Professional development
- **System-wide economies of scale**
 - Prospect research tools
 - Executive search services



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Advancement Initiatives

- **Shared Services Overview**
 - Based on performance metrics, needs as expressed by campuses
 - Goal: increase metrics to 75th percentile of peers by 2015
 - ◆ Annual Fund, Major Gifts, Planned Giving
 - Use of strategies
 - ◆ Preferred vendors, fostering best practices, shared staffing
 - Timeline
 - ◆ Advisory team hard at work; implementation begins July 2013



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