

UNIVERSITY ADVANCEMENT UPDATE

Budget and Finance

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Presentation Outline

- **Strategic Plan Recommendations**
- **FY 2013-14 Data and Recent Trends**
- **Increased Accountability**
- **Governor's 2015-17 Budget Recommendation**
- **UNC-GA Shared Services**

Strategic Plan Goals and Recommendations

- **“Our Time, Our Future” key goals:**

 - Goal 4: Maximizing Efficiencies*

 - Goal 5-C: Enhance Private Fundraising*

- **Enhancing private fundraising was established as a strategy in support of these goals with two very aggressive outcome measures over five years:**

 - **Increase UNC total gifts by a minimum of 25% (\$125 million); and**
 - **Move all campuses to at least the 50th percentile in key performance metrics as compared to their peers.**

FY 2013-14 Budget and Staffing

Constituent Institution	Development Budget	% Dev. Budget State Funded	Total Gift Receipts	Total Dev. FTE
ASU	\$ 4,050,609	56%	\$ 14,485,772	35
ECU	5,858,579	57%	21,819,017	47
ECSU	403,634	100%	1,133,859	6
FSU	990,139	86%	823,350	10
NCA&T	1,475,319	81%	6,845,694	17
NCCU	1,143,006	92%	5,420,902	14
NCSU	11,478,039	56%	117,534,686	108
UNCA	1,040,377	90%	1,952,017	9
UNC-CH	30,224,016	9%	298,804,228	257
UNCC	2,699,505	80%	15,373,548	24
UNCG	3,204,747	93%	10,577,338	43
UNCP	954,582	94%	1,425,353	6
UNCW	1,539,932	94%	7,829,230	17
UNCSA	1,515,983	65%	7,771,187	10
WCU	1,802,598	58%	3,803,024	17
WSSU	1,562,288	84%	3,207,139	12
NCSSM	245,623	55%	1,218,244	2
Total	70,188,976		520,024,588	634

FY 2013-14 Return on Investment (Cash and Commitment Basis)

Constituent Institution	Total Gift Receipts	ROI: Total Cash Received per Dev. \$1.00 invested	Total Effort: Gifts, Commitments, and Pledges	ROI: Total Commitment per Dev. \$1.00 invested
ASU	\$ 14,485,772	3.58	\$ 26,363,770	6.51
ECU	21,819,017	3.72	33,471,821	5.71
ECSU	1,133,859	2.81	1,133,859	2.81
FSU	823,350	0.83	3,950,520	3.99
NCA&T	6,845,694	4.64	7,281,808	4.94
NCCU	5,420,902	4.74	5,513,282	4.82
NCSU	117,534,686	10.24	187,110,517	16.30
UNCA	1,952,017	1.88	5,441,458	5.23
UNC-CH	298,804,228	9.89	310,326,947	10.27
UNCC	15,373,548	5.69	30,463,628	11.28
UNCG	10,577,338	3.30	11,417,814	3.56
UNCP	1,425,353	1.49	1,727,720	1.81
UNCW	7,829,230	5.08	8,021,274	5.21
UNCSA	7,771,187	5.13	7,853,456	5.18
WCU	3,803,024	2.11	4,124,070	2.29
WSSU	3,207,139	2.05	3,455,179	2.21
NCSSM	1,218,244	4.96	1,259,765	5.13
Total	520,024,588	7.41	648,916,888	9.25

We Are Making Progress

■ Collectively, UNC institutions have shown consistent growth in total gifts:

- **FY 2010** **\$438,298,690**
- **FY 2011** **\$475,673,898**
- **FY 2012** **\$484,795,565**
- **FY 2013** **\$496,581,624**
- **FY 2014** **\$520,024,588**

* Source: *Voluntary Support of Education (VSE)*

Total Endowment 10-Year Trends

Institution	FY 2003-04	FY 2008-09	FY 2013-14
ASU	\$ 52,732,845	\$ 50,391,902	\$ 91,428,694
ECU	65,729,000	87,152,000	165,724,193
ECSU	2,267,262	3,253,643	10,054,904
FSU	7,856,959	12,111,665	19,244,679
NCAT	9,392,473	20,732,170	39,501,411
NCCU	13,042,161	22,773,875	39,267,503
NCSU	324,189,000	463,866,000	885,056,208
UNCA	14,916,398	21,805,578	37,216,168
UNC-CH	1,232,118,534	1,903,720,728	2,659,759,286
UNCC	86,999,000	112,993,951	169,193,034
UNCG	124,220,645	152,256,230	251,755,902
UNCP	4,811,598	11,752,229	21,153,758
UNCW	23,030,000	48,931,253	85,264,962
UNCSA	18,038,000	20,317,009	46,314,321
WCU	23,280,050	33,857,597	62,289,525
WSSU	15,482,487	19,874,537	34,308,036
NCSSM	3,450,420	3,762,746	7,998,654
Total	2,021,556,832	2,989,553,113	4,625,531,238

Increased Accountability

- **Private Fundraising Index is one of the ten BOG-approved effectiveness metrics adopted in August 2014.**
- **Additional data for analysis includes:**
 - **Total gifts, pledges, and new commitments**
 - **Donor support**
 - **Return on investment**

Governor's 2015-17 Budget Recommendation

Constituent Institution	2012-13 Development Budget	Dev. Budget State Funded	2012-13 State Funded Dev. Budget	2012-13 Total Gift Receipts	Total Dev. FTE	FTE Prorated by % Dev. Budget State Funded	Cap State Funded Dev. Budget at \$1M
NCSU	\$11,486,786	59%	\$6,777,204	\$131,377,842	105	61.95	(\$5,777,204)
ECU	5,603,510	75%	4,202,633	15,351,912	41	30.75	(3,202,633)
UNCG	4,812,589	86%	4,138,827	13,072,905	47	40.42	(3,138,827)
UNC-CH	25,503,872	10%	2,550,387	272,767,187	210	21.00	(1,550,387)
UNCC	2,406,039	87%	2,093,254	11,168,340	23	20.01	(1,093,254)
ASU	4,103,441	51%	2,092,755	12,045,776	35	17.85	(1,092,755)
NCCU	1,854,379	97%	1,798,748	3,780,529	14	13.58	(798,748)
NCA&T	1,681,437	93%	1,563,736	6,896,636	15	13.95	(563,736)
UNCW	1,467,786	98%	1,438,430	5,559,097	15	14.70	(438,430)
WSSU	1,230,464	94%	1,156,636	4,953,540	11	10.34	(156,636)
UNCP	1,150,373	94%	1,081,351	1,227,412	9	8.46	(81,351)
UNCA	1,073,529	95%	1,019,853	4,128,570	15	14.25	(19,853)
ECSU	723,409	100%	723,409	1,353,554	7	7.00	No Cut <\$1M
FSU	306,267	84%	257,264	1,230,566	10	8.40	No Cut <\$1M
UNCSA	1,436,325	68%	976,701	6,838,447	7	4.76	No Cut <\$1M
WCU	1,028,912	64%	658,504	3,662,051	14	8.96	No Cut <\$1M
NCSSM	257,817	35%	90,236	1,096,190	3	1.05	No Cut <\$1M
Total	66,126,935		32,619,926	496,510,554	581	297.43	(17,913,812)

Governor's 2015-17 Budget Recommendation

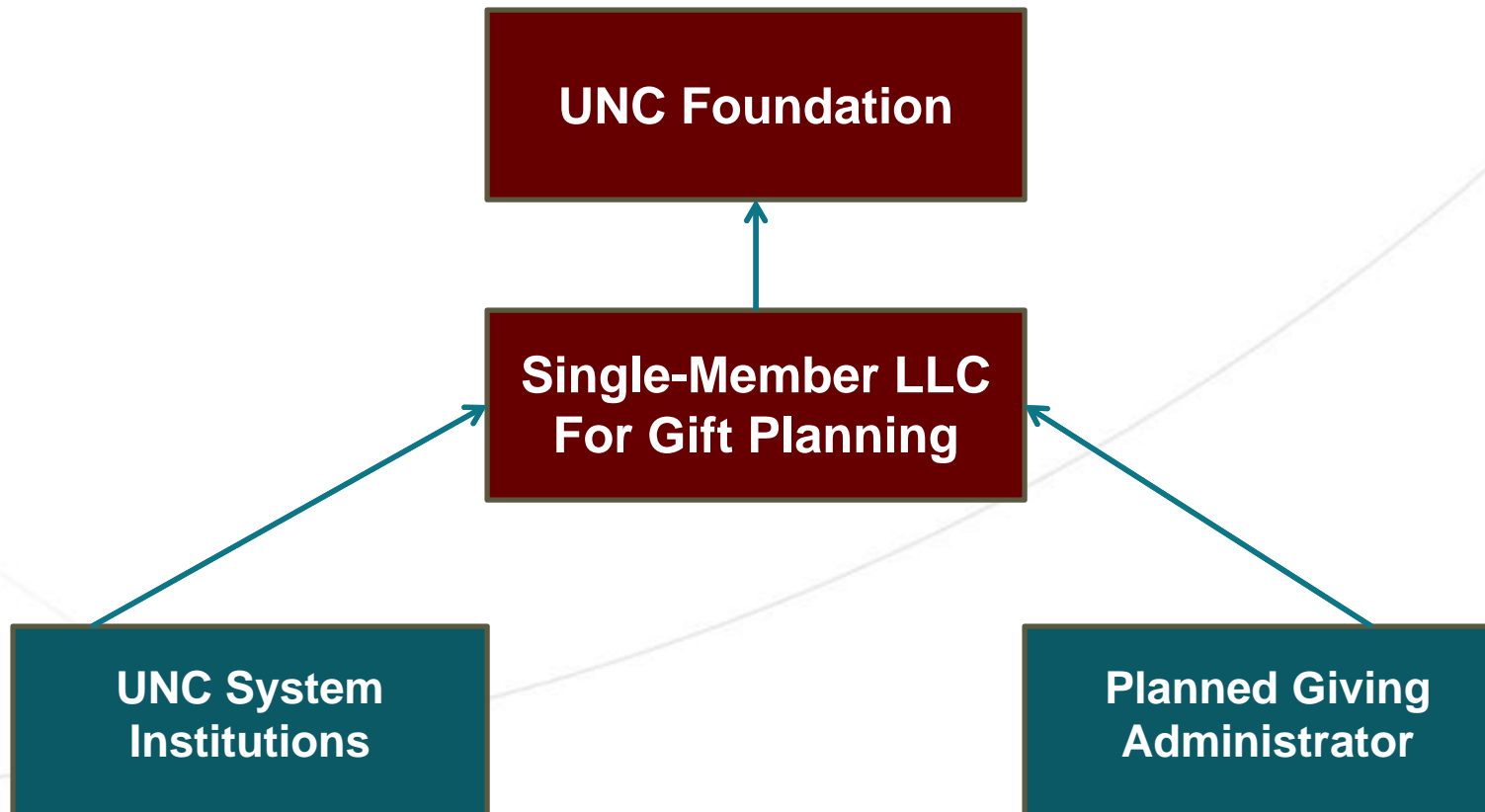
University Concerns:

- **Eliminates Chancellor flexibility**
- **Inhibits a proven strong return on investment**
- **Private fundraising supports financial aid for students**

UNC-GA Value Added Services

- **Enhance philanthropic support and manage a sustainable operation model that includes:**
 - **Fundraising for system-wide priorities, key foundation initiatives, and enhancing major/planned giving opportunities**
 - **Centralized prospect research program focused on donor discovery for emerging campuses**
 - **System-wide master contracts to reduce costs for common services (e.g. software and communication)**
 - **Human resource and talent management initiatives**
 - Executive Search
 - Training and Development
 - Résumé Repository
 - Consulting Services

UNC System Gift Planning



BOG Discussion

Questions?