

University Advancement

Vice Chancellor's Report

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Chief of Staff and Interim Vice Chancellor for University Advancement

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North Carolina Agricultural and Technical State University



Major Gifts

- The heart of a comprehensive campaign including annual and planned gifts.

Case for Support

- More than \$800 million of philanthropic priorities were identified to develop the case summary for the feasibility study.
- Briefing papers are being prepared on key projects for discussion with donors.



Major Gifts

Prospects

- More than 3,000 prospective major gift donors identified in earlier screening.
- Recent capacity analysis suggests more than 6,000 alumni and friends are capable of a major gift and 600 current donors profile as strong candidates for a major gift.
- 395 prospects are currently assigned of which 120 are their top prospects.



Major Gifts

Activity

- Chancellor engaged with top 30 prospects.
- Development Officers have prioritized their assignments and are focusing on their top 25 (totaling 120 prospects) who are in the following stages of solicitation, cultivation, stewardship, or identification.



Annual Campaign Report

FY14 YTD

PHILANTHROPIC COMMITMENTS

- By Constituency -



July 1, 2013 - March 31, 2014

Constituency	Gifts for Current Needs					Deferred Planned Gifts	Total Raised	Goal	% of Goal
	Pledges	Outright Gifts	Gifts-in-Kind	Realized Planned Gifts	Total				
Alumni	\$601,651	\$676,015	\$93	\$0	\$1,277,759	\$0	\$1,277,759		
Corporations	65,000	1,594,179	113,605	0	1,772,784	0	1,772,784		
Foundations	132,000	316,307	0	0	448,307	0	448,307		
Other Individuals	87,392	953,829	113	0	1,041,334	0	1,041,334		
Other Organizations	25,000	124,190	301	250,000	399,491	0	399,491		
Subtotal	\$911,043	\$3,664,519	\$114,112	\$250,000	\$4,939,675	\$0	\$4,939,675	\$7,500,000	66%
Government (Includes Title III)	0	3,100	0	0	3,100	0	3,100	\$1,000,000	0%
Total	\$911,043	\$3,667,619	\$114,112	\$250,000	\$4,942,775	\$0	\$4,942,775	\$8,500,000	58%
<i>Percent Achieved of last year's total to-date:</i>							59% ⁽¹⁾		

July 1, 2012 - March 31, 2013

Constituency	Gifts for Current Needs					Deferred Planned Gifts	Total Raised	Goal	% of Goal
	Pledges	Outright Gifts	Gifts-in-Kind	Realized Planned Gifts	Total				
Alumni	\$1,496,479	\$620,044	\$0	\$0	\$2,116,522	\$0	\$2,116,522		
Corporations	1,763,395	1,842,288	95,681	0	3,701,364	0	3,701,364		
Foundations	0	325,425	0	0	325,425	0	325,425		
Other Individuals	92,503	703,456	22,922	0	818,881	0	818,881		
Other Organizations	0	463,105	225	450	463,780	0	463,780		
Total	\$3,352,376	\$3,954,317	\$118,828	\$450	\$7,425,972	\$0	\$7,425,972	\$7,142,857	104%
Government (Includes Title III)	0	982,060	0	0	982,060	0	982,060	\$952,381	103%
Total	\$3,352,376	\$4,936,377	\$118,828	\$450	\$8,408,032	\$0	\$8,408,032	\$8,095,238	104%

⁽¹⁾ The variance between commitments made in FY13 and FY14 is due to four large commitments made in FY13 from NC GlaxoSmithKline (\$1.8M), Willie Deese (\$1M), Clara Hooker Black (\$570K), and Merck and Company (\$400K).



Major Gifts

Activity

- 29 have made new gifts of \$2.6M so far this year.
- 5 have made pledge payments of \$800K so far this year.
- 8 have made new pledges of \$350K so far this year.
- 33 are considering gift proposals of \$1,413,000.
- 73 are in the solicitation phase and of those, 29 will be presented proposals for \$1,278,000 by the end of the fiscal year.
- 149 are in cultivation, 68 in stewardship, and 88 in identification phases.



Major Gifts

Metrics and Plans

- Expectations in place for contacts, visits, solicitations.
- Chancellor, Provost have performance plans, Deans and Development Officers are completing theirs.
- College and School plans due May 1 as a key component of comprehensive plans for FY15.



Major Gifts

Named Gift Opportunities

- Using A&T's very sound policy on naming as the basis, recommendations are being developed for endowed chairs, professorships, colleges, schools, departments, classrooms, and labs.

Policies

- Gift acceptance and prospect management policies have been drafted and under review.



Annual Giving

- An in depth analysis of all gifts for current support is being done to support a comprehensive plan for FY15 including leadership gifts, close coordination with the NAA, AAF, direct mail, and the call center.
- A robust annual giving program will provide immediate benefit to us and is an important strategy in major gift prospect identification.



Planned Giving

- Research is being done to identify all donors who qualify for the Charles E. Moore Legacy Society.
- Current marketing efforts have been enhanced and a comprehensive plan for FY15 is being developed featuring a two-year charter/founding membership for the Society.



Stewardship

- The Stewardship Task Force is completing its work and will have its recommendations to the Chancellor by April 26, 2014.
- A number of individual stewardship issues have been identified and addressed.



Volunteer Leadership

- A number of potential trustees for the new philanthropic foundation have been identified.



Staffing/Professional Development

- Reorganization approved
- Searches ongoing for:
 - VC University Advancement
 - AVC Development
 - Director Corporate/Foundation Relations
 - Director of Stewardship
 - Major Gifts Officer



Staffing/Professional Development

- Four Graduate Assistants being appointed to support annual fund and major gifts work.
- In addition to fundraising training already received, Deans training on the basics of planned giving upcoming, CASE conferences identified for FY15.



Resources

- A plan has been developed for the effective utilization of the endowment management fee and identifying the additional resources needed for FY15 and beyond.
- Key issues are competitive compensation to attract able candidates, aligning all major gift officers within development, and adequate operational support such as travel to meet with prospects.



Campaign Strategy Study

- Interviews going well and should be completed by late May and a draft report to the Chancellor by June 15.



Affiliated Entities

National Alumni Association, Inc.

- Strategic planning
 - » Chapter presidents meeting – March 22, 2014
 - » Meeting with key stakeholders - April 2014
 - » Printed document expected – May 2014
 - » Governance work target completion date - June 2014
 - » Phased implementation & communication plans expected completion dates - May/July 2014

- Annual meeting – May 9, 2014



Affiliated Entities

Aggie Athletic Foundation, Inc.

- AAF Renewal Period
 - » The football priority purchase period will run April 14—May 23
 - » Ticket sales will open to the general public on May 27
- AAF Annual Donor Meeting – April 5, 2014
- Summer Caravan Tours
 - » Confirmed locations: Atlanta (May 31) and Washington D.C. (June 20)
- Fundraising campaigns
 - » Text-to-Give Campaign (on-going)
 - Goal is to attract younger alumni to support the AAF
 - » Brick Campaign—will launch during Caravan Tours
- Next Board Meeting – May 1, 2014



Affiliated Entities

Hall of Fame

- Special events fundraiser/engagement
 - » Hall of Fame Banquet and Induction Ceremony – September 4, 2014
 - » Golf tournament – September 5, 2014
 - » Hall of Fame Giver Campaign

- Hall of Fame Website Complete

- Next Board Meeting – May 10, 2014



Affiliated Entities

NC A&T University Foundation

- The Foundation Task Force Assessment was presented to the foundation board April 23, 2014.

