



NORTH CAROLINA AGRICULTURAL  
AND TECHNICAL STATE UNIVERSITY

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# *UNIVERSITY ADVANCEMENT VICE CHANCELLOR'S REPORT*

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Kenneth E. Sigmon, Jr.

Vice Chancellor for University Advancement

February 17, 2017

Board of Trustees Advancement and External  
Affairs Committee Meeting

AGGIES **DO**



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# *Division Staffing*

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# University Advancement

## *Building the Team*

- 22 of 28 full-time positions filled – 80%
  - » 17 of those have been appointed in roughly the past year
- Positions to be filled:
  - » AVC for Alumni Relations/ED of NAA (Teresa Davis, Interim)
  - » Director of Alumni Communications (Vacant)
  - » Business Officer (Doris Godette, Interim)
  - » Director of Development (Vacant - CHHS & CAHSS)
  - » Asst. Director of Annual Giving (Vacant)
  - » Director of Prospect Management (Vacant)
  - » Director of Donor Relations & Stewardship (Vacant)



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# *Fundraising Reports*

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## Gifts and New Commitments – Source and Type

### *July 1, 2016 – December 31, 2016*

| CONSTITUENT  | PLEDGES            | OUTRIGHT<br>GIFTS  | GIFTS<br>IN KIND | REALIZED<br>PLANNED<br>GIFTS | DEFERRED<br>PLANNED<br>GIFTS | TOTAL              |
|--------------|--------------------|--------------------|------------------|------------------------------|------------------------------|--------------------|
| ALUMNI       | \$769,624          | \$689,746          | \$0              | \$56,186                     | \$26,000                     | \$1,541,556        |
| CORPORATE    | \$2,025,000        | \$1,890,230        | \$7,408          | \$0                          | \$0                          | \$3,922,638        |
| FOUNDATION   | \$14,000           | \$516,475          | \$0              | \$0                          | \$0                          | \$530,475          |
| NON-ALUMNI   | \$80,866           | \$126,662          | \$101,301        | \$0                          | \$0                          | \$308,828          |
| OTHER ORGS   | \$25,000           | \$266,825          | \$0              | \$0                          | \$0                          | \$291,825          |
| <b>TOTAL</b> | <b>\$2,914,490</b> | <b>\$3,489,938</b> | <b>\$108,709</b> | <b>\$56,186</b>              | <b>\$26,000</b>              | <b>\$6,595,323</b> |

### *July 1, 2015 – December 31, 2015*

| CONSTITUENT  | PLEDGES            | OUTRIGHT<br>GIFTS  | GIFTS<br>IN KIND | REALIZED<br>PLANNED<br>GIFTS | DEFERRED<br>PLANNED<br>GIFTS | TOTAL              |
|--------------|--------------------|--------------------|------------------|------------------------------|------------------------------|--------------------|
| ALUMNI       | \$496,847          | \$564,491          | \$18,275         | \$241,098                    | \$2,500                      | \$1,323,212        |
| CORPORATE    | \$1,000,000        | \$1,439,665        | \$11,335         | \$0                          | \$0                          | \$2,451,000        |
| FOUNDATION   | \$0                | \$229,547          | \$0              | \$0                          | \$0                          | \$229,547          |
| NON-ALUMNI   | \$107,334          | \$116,080          | \$1,128          | \$0                          | \$0                          | \$224,542          |
| OTHER ORGS   | \$5,240            | \$173,679          | \$0              | \$0                          | \$0                          | \$178,919          |
| <b>TOTAL</b> | <b>\$1,609,421</b> | <b>\$2,523,462</b> | <b>\$30,737</b>  | <b>\$241,098</b>             | <b>\$2,500</b>               | <b>\$4,407,219</b> |

## Gifts and New Commitments – Purpose

*July 1, 2016 – December 31, 2016*

|                             | Objective    | Amount             |
|-----------------------------|--------------|--------------------|
| Endowment                   | Facilities   | \$0                |
|                             | Faculty      | \$1,800            |
|                             | Programmatic | \$66,928           |
|                             | Scholarships | \$622,949          |
| <b>Subtotal Endowment</b>   |              | <b>\$691,677</b>   |
| Current Use                 | Facilities   | \$12,095           |
|                             | Faculty      | \$100              |
|                             | Programmatic | \$1,855,592        |
|                             | Research     | \$2,894,038        |
|                             | Scholarships | \$994,095          |
|                             | Unrestricted | \$147,726          |
| <b>Subtotal Current Use</b> |              | <b>\$5,903,645</b> |
| <b>Grand Total</b>          |              | <b>\$6,595,323</b> |

## Gifts and New Commitments – Size

| Gift Size                 | Last Year    |                     | This Year    |                     |
|---------------------------|--------------|---------------------|--------------|---------------------|
|                           | Gifts        | Gifts Total         | Gifts        | Gifts Total         |
| \$1,000,000 - \$4,999,999 | 1            | \$ 1,000,000        | 1            | \$ 2,000,000        |
| \$250,000 - \$499,999     | 1            | \$ 250,000          | 2            | \$ 550,000          |
| \$100,000 - \$249,999     | 3            | \$ 433,080          | 4            | \$ 644,089          |
| \$50,000 - \$99,999       | 10           | \$ 586,285          | 11           | \$ 733,043          |
| \$25,000 - \$49,999       | 18           | \$ 513,387          | 27           | \$ 847,166          |
| \$10,000 - \$24,999       | 22           | \$ 308,050          | 38           | \$ 575,092          |
| \$5,000 - \$9,999         | 49           | \$ 266,450          | 43           | \$ 250,828          |
| \$1,000 - \$4,999         | 315          | \$ 488,206          | 275          | \$ 424,771          |
| \$500 - \$999             | 290          | \$ 166,110          | 294          | \$ 162,100          |
| \$250 - \$499             | 471          | \$ 135,429          | 523          | \$ 147,217          |
| \$1 - \$249               | 3,518        | \$ 260,222          | 3,632        | \$ 261,017          |
| <b>Totals</b>             | <b>4,698</b> | <b>\$ 4,407,219</b> | <b>4,841</b> | <b>\$ 6,595,323</b> |



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# *Campaign Update*

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## Highlights

- Closing in on the halfway point at almost 49% of goal
- Far surpassed the Program Support goal due to generous C&F support
- Created 86 new endowed scholarship funds
- Four new endowed faculty positions
- Over 12,000 donors to date

NCA&T CAMPAIGN REPORT

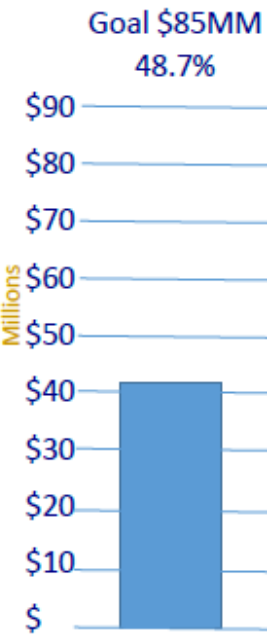
Jan 31 2017

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STATE UNIVERSITY

Report based on campaign start date of July 1, 2012

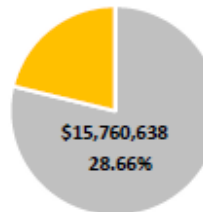
### Campaign Production



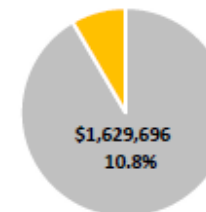
Total: \$41,378,543

### Campaign Priorities

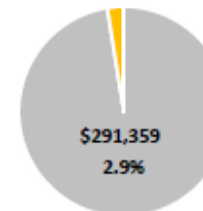
Student Support  
Goal: \$55MM



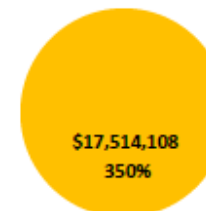
Faculty Support  
Goal: \$15MM



Facility Support  
Goal: \$10MM



Program Support  
Goal: \$5MM



### Campaign Benchmarks

Number of Endowed Scholarship Funds

|                   |     |       |
|-------------------|-----|-------|
| 207               | 86  | 293   |
| Prior to 7/1/2012 | New | Total |

Number of Endowed Chairs & Professorships

|                   |     |       |
|-------------------|-----|-------|
| 16                | 4   | 20    |
| Prior to 7/1/2012 | New | Total |

Deferred Commitments **\$1,158,488**

Number of Campaign Donors **12,453**

|           |       |
|-----------|-------|
| Alumni    | 8,723 |
| Friends   | 2,821 |
| Corp/Fdtn | 909   |

## Next Steps

### *Campaign Silent Phase*

- Continue leadership/principal gift identification, cultivation, and solicitation
- Ongoing education, cultivation, and solicitation of volunteer leadership
  - » Giving targets have been set for all volunteer boards
- Deployment of constituent development team and increased engagement of deans in fundraising - particularly alumni
- Wrap up silent phase by end of year

# Campaign Timeline

|   | 2013                              | 2014                             | 2015 | 2016                          | 2017 | 2018                                | 2019 | 2020 | 2021                    |  |
|---|-----------------------------------|----------------------------------|------|-------------------------------|------|-------------------------------------|------|------|-------------------------|--|
| <b>Campaign Counting Period</b>         | Yellow bar spanning 2013-2020     |                                  |      |                               |      |                                     |      |      |                         |  |
| <b>Campaign Planning</b>                |                                   | Dark blue bar spanning 2014-2015 |      |                               |      |                                     |      |      |                         |  |
| <b>Volunteer Leadership Recruitment</b> |                                   |                                  |      | Green bar spanning 2016-2017  |      |                                     |      |      |                         |  |
| <b>Leadership/Principal Gifts</b>       |                                   |                                  |      | Red bar spanning 2016-2017    |      |                                     |      |      |                         |  |
| <b>Campaign Kick Off</b>                |                                   |                                  |      |                               |      | Light orange bar spanning 2018-2019 |      |      |                         |  |
| <b>Major Gifts</b>                      |                                   |                                  |      | Orange bar spanning 2016-2020 |      |                                     |      |      |                         |  |
| <b>General Gifts</b>                    | Light blue bar spanning 2013-2020 |                                  |      |                               |      |                                     |      |      |                         |  |
| <b>Celebration</b>                      |                                   |                                  |      |                               |      |                                     |      |      | Dark purple bar in 2021 |  |



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# *Alumni Engagement*

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## Week of Aggie Love

*Sponsored by the Young Alumni Council*

- Connecting “Young Aggies” with each other, their communities, and the University through:
  - » Community Service
  - » Giving
  - » Fun!



Young Alumni Council  
**Week of Aggie Love**  
Jan. 30 - Feb. 4  
#NCATAggieLove #NCATyac

**Monday, Jan. 30**  
Community Service

- Noon-2 p.m.  
Wiley Elementary School  
600 West Terrell St., Greensboro, NC 27406  
Assist teachers and students through mentoring and classroom support
- 4-6 p.m.  
Brentwood Boys & Girls Club  
2025 New Hope Church Rd., Raleigh, NC 27604  
Assist students with homework, recreational activities and more

**Tuesday, Jan. 31, 4-6 p.m.**  
Community Service  
Reynolds Center Boys & Girls Club  
1001 Freeman Mill Rd., Greensboro, NC 27403  
Assist students with homework, recreational activities and more

**Wednesday, Feb. 1, 6 a.m.**  
Sit-in 57th Anniversary Breakfast  
Alumni Foundation Event Center  
The annual breakfast pays tribute to the A&T Four – Ezell Blair (Jibreel Khazan), Franklin McCain, Joseph McNeil and David Richmond – and honors the 2017 Human Rights Medal recipient and the winners of the annual essay and poster contests.

**Thursday, Feb. 2**  
Young Alumni Giving Day  
#NCATAggieLove #NCATyac #NCATgive  
The Young Alumni Council strives to provide scholarship support to students seeking an education at N.C. A&T. Gifts made through this scholarship campaign allow alumni to demonstrate their Aggie Pride and support the future of this great institution.  
GIVE TODAY: [www.ncat.edu/givenow](http://www.ncat.edu/givenow)

**Friday, Feb. 3, 8-10 p.m.**  
Spare Time  
5502 Hornaday Rd., Greensboro, NC 27409  
Bowling – \$15/per person (includes two hours of bowling and shoe rental)  
Refreshments will be provided.

**Friday, Feb. 3, 8-10 p.m.**  
Boxcar Arcade  
330 W. Davie St., Raleigh, NC 27609  
Enjoy fun and games.

**Saturday, Feb. 4, 7 p.m.**  
Greensboro Swarms vs. Long Island Nets  
Greensboro Coliseum  
2411 W. Gate City Blvd., Greensboro, NC 27403  
Tickets: \$11/in advance  
\$16/at the door  
Please visit [swarm.imaginapp.com](http://swarm.imaginapp.com)  
Select 'Group Code' and enter: NCAT  
Tickets will be at Will Call the night of the game!

Register for events at <https://ncatyacweekofaggielove2017.eventbrite.com>  
For questions, contact 336-433-5570 or [yac@ncat.edu](mailto:yac@ncat.edu)

# Week of Aggie Love

## *Participation*

- Summary of “Week of Aggie Love”
  - Wiley Elementary – 18
  - Boys & Girls Club (Raleigh) – 7
  - Boys & Girls Club (Greensboro) – 19
  - Sit-In Breakfast – 6
  - Bowling event (Raleigh) – 28
  - Bowling event (Greensboro) – 12
  - Greensboro Swarm game – 13



# Week of Aggie Love

## *Giving*

### Summary

- Primarily a social media campaign to engage young alumni
- Drive to acquire new donors
  - » Our future!
- On-line giving platform

AGGIES **DO**



Support student scholarships on  
Young Alumni Giving Day  
February 2, 2017

Log on to [www.ncat.edu/givenow](http://www.ncat.edu/givenow), donate.  
Share and ReTweet this flyer on your social media accounts  
Like and follow the N.C. A&T Young Alumni Council on  
Facebook, Instagram and Twitter, @NCATYAC.

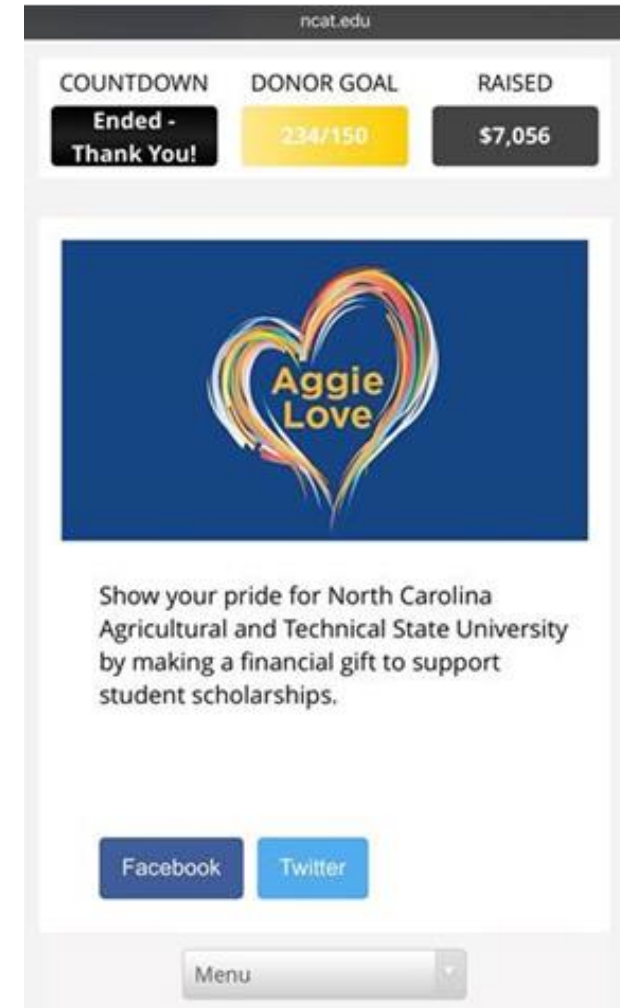


# Week of Aggie Love

## *Giving*

### Summary

- Exceeded the goal of 150 donors by 84
- Raised over \$7,000 for scholarships
- Touched all areas of the University
- Following up with continued social media efforts





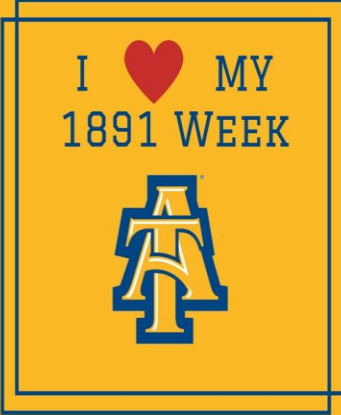
## I ♥ My 1891 Week

### Career Panels

#### Summary

- Connecting alumni with current students
- Focused on career and affinity groups
  - » Education
  - » Law & Civic Service
  - » Corporate Aggies
  - » Aggie Entrepreneurs

## Alumni Career Panels



**Monday, Feb. 6**  
"Education"  
Proctor Hall, Room 160  
7-9 p.m.

Hear from alumni serving as administrators and professionals in the fields of K-12 and higher education.

**Tuesday, Feb. 7**  
"Law & Civic Service"  
Academic Classroom Building, Room 107  
7-9 p.m.

Engage with Aggie lawyers, political figures and public safety.

**Wednesday, Feb. 8**  
"Corporate Aggies"  
General Classroom Building, Room 218  
7-9 p.m.

Participate in a discussion with alumni about the corporate workplace.

**Thursday, Feb. 9**  
"Aggie Entrepreneurs"  
Academic Classroom Building, Room 101  
7-9 p.m.

Learn from Aggies who own businesses in various fields including entertainment, fitness, events, technology and more.

Sponsored by: Office of Alumni Relations and New Student Programs  
For questions, contact 336-433-5570, 336-256-2212 or [alumni@ncat.edu](mailto:alumni@ncat.edu)



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# *Tax Reform*

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# Monitoring Tax Reform Proposals

## *Endowment Proposal*

- Watching efforts to legislate endowment management and spending by Rep. Tom Reed (R-N.Y.), a member of the House Ways and Means Committee
- Legislation soon that would require colleges and universities with endowments over \$1 billion or \$500,000 per student to direct 25 percent of their investment gains to pay for working-class students' cost of education (students whose families earn less than 600 percent of the federal poverty level)

# Monitoring Tax Reform Proposals

## *Endowment Proposal*

- Institutions that fail to meet the requirement would be subject to excise taxes and other penalties
  - » First Year – 30% tax on undistributed required payout
  - » Second Year – 100% tax on undistributed payout
  - » Third Year – Loss of tax-exempt status
- Enhanced charitable deduction to donors to these institutions who make unrestricted gifts or gifts restricted to student scholarships and would limit the charitable deduction to donors who make restricted gifts to other areas to \$5,000

# Monitoring Tax Reform Proposals

## *Charitable Deductions*

- The proposal to double the current standard deduction will significantly reduce the number of taxpayers who itemize (from roughly 30 percent to 5 percent), effectively eliminating the charitable deduction for 95 percent of Americans
  - \$12,200 for individuals and \$22,000 for households
- \$100,000 hard dollar cap (\$200,000 for couples/families filing jointly) that would eliminate the charitable deduction for many of the remaining taxpayers who itemize
  - The nonpartisan Tax Policy Center estimates that President Trump's tax plan would reduce giving by 4.5 to 9 percent

# Monitoring Tax Reform Proposals

## *Charitable Deductions*

- Other proposals would limit the charitable deduction, such as the two-percent adjusted gross income floor included in former House Ways and Means Chairman Dave Camp's tax reform discussion draft
- Floor proposals send a signal that gifts below the floor, including those made by middle to lower income donors, are less important and would act as additional hurdle for the remaining five percent of itemizing taxpayers
  - One survey indicated that the charitable sector would lose \$3 billion per year in charitable contributions if a two percent adjusted gross income (AGI) floor were imposed

# Monitoring Tax Reform Proposals

## *Charitable Deductions*

- Charitable donations help colleges, universities and independent schools achieve their teaching, research and public service missions
  - » For the past 100 years, the charitable deduction has encouraged individuals to make significant gifts to educational institutions
- As federal and state governments continue to cut funding for higher education, raising private support from individuals has become even more crucial for colleges and universities

# Monitoring Tax Reform Proposals

## *Charitable Deductions*

- According to the *Giving USA 2016*, high net worth households account for an estimated \$132 billion of the \$264 billion given to charitable organizations in 2015 (high net worth households are households with income greater than \$200,000 and/or net worth of at least \$1 million)
  - » These are the taxpayers who have the resources to give to charitable causes consistently, and U.S. tax policy should encourage them to continue to give generously



# Monitoring Tax Reform Proposals

## *Charitable Deductions*

- Council for Advancement and Support of Education's (CASE) Position
- Instead of enacting changes that would curtail the charitable deduction, lawmakers should strive to enhance and expand it
- An above-the-line, or universal, charitable deduction would expand the deduction to all taxpayers and exclude all charitable gifts from taxation
  - » Such a proposal would increase giving in both dollars and number of new donors, increase fairness by treating all taxpayers' charitable contributions equally under the tax code and provide modest tax relief for low- and middle-income taxpayers.



# Questions?