



NORTH CAROLINA AGRICULTURAL
AND TECHNICAL STATE UNIVERSITY

UNIVERSITY ADVANCEMENT VICE CHANCELLOR'S REPORT

Kenneth E. Sigmon, Jr.

Vice Chancellor for University Advancement

February 16, 2018

Board of Trustees Advancement and External
Affairs Committee Meeting

AGGIES **DO**



Fundraising Reports

Gifts and New Commitments – Source and Type

July 1, 2017 – December 31, 2017

| CONSTITUENT | PLEDGES | OUTRIGHT GIFTS | GIFTS IN KIND | REALIZED PLANNED GIFTS | DEFERRED PLANNED GIFTS | TOTAL |
|--------------|--------------------|--------------------|------------------|------------------------------|------------------------------|--------------------|
| ALUMNI | \$1,099,352 | \$928,634 | \$0 | \$26,281 | \$239,354 | \$2,293,620 |
| CORPORATE | \$25,000 | \$1,225,444 | \$2,822 | \$0 | \$0 | \$1,253,266 |
| FOUNDATION | \$575,000 | \$514,292 | \$0 | \$0 | \$0 | \$1,089,292 |
| NON-ALUMNI | \$358,905 | \$283,306 | \$350 | \$0 | \$0 | \$642,561 |
| OTHER ORGS | \$1,005,000 | \$48,944 | \$115 | \$0 | \$0 | \$1,054,059 |
| TOTAL | \$3,063,257 | \$3,000,619 | \$3,287 | \$26,281 | \$239,354 | \$6,332,798 |

July 1, 2016 – December 31, 2016

| CONSTITUENT | PLEDGES | OUTRIGHT GIFTS | GIFTS IN KIND | REALIZED PLANNED GIFTS | DEFERRED PLANNED GIFTS | TOTAL |
|--------------|--------------------|--------------------|------------------|------------------------------|------------------------------|--------------------|
| ALUMNI | \$751,354 | \$599,296 | \$0 | \$56,186 | \$26,000 | \$1,432,836 |
| CORPORATE | \$2,025,000 | \$1,090,331 | \$353 | \$0 | \$0 | \$3,115,684 |
| FOUNDATION | \$0 | \$766,552 | \$0 | \$0 | \$0 | \$766,552 |
| NON-ALUMNI | \$112,431 | \$127,074 | \$65,801 | \$0 | \$0 | \$305,306 |
| OTHER ORGS | \$25,000 | \$254,762 | \$0 | \$0 | \$0 | \$279,762 |
| TOTAL | \$2,913,785 | \$2,838,015 | \$66,154 | \$56,186 | \$26,000 | \$5,900,140 |



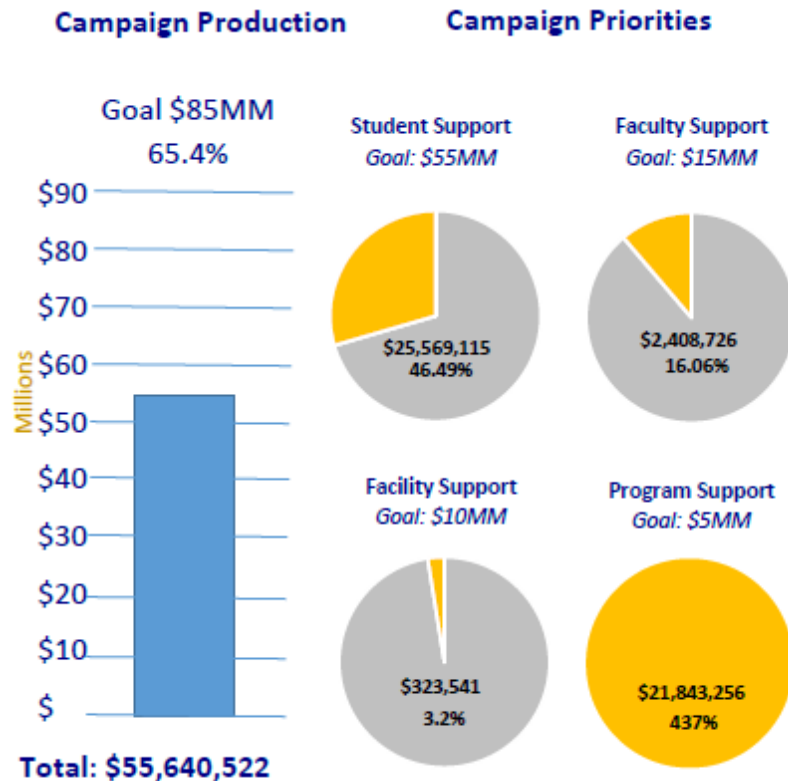
Campaign Update

Highlights

- Surpassed 65 percent of goal and nearing decision on public phase
- Now up to 114 new endowed scholarship funds
- Five new endowed faculty positions
- Deferred gift pipeline closing in on \$5MM
- Almost 15,000 donors to date
- Over 10,000 alumni donors



NORTH CAROLINA
AGRICULTURAL AND TECHNICAL
STATE UNIVERSITY



NCA&T CAMPAIGN REPORT

January 2018

Report based on campaign start date of July 1, 2012

Campaign Benchmarks

Number of Endowed Scholarship Funds

| | 207 | 114 | 321 |
|-------------------|-----|-----|-------|
| Prior to 7/1/2012 | | New | Total |

Number of Endowed Chairs & Professorships

| | 16 | 5 | 21 |
|-------------------|----|-----|-------|
| Prior to 7/1/2012 | | New | Total |

Deferred Commitments \$4,724,845

Number of Campaign Donors 14,815

| | |
|-----------|--------|
| Alumni | 10,334 |
| Friends | 3,463 |
| Corp/Fdtn | 1,018 |

Next Steps

Moving Into Public Phase

- Continue with volunteer leadership/principal gift identification, cultivation, and solicitation and continue to identify new potential donors.
- Extend deployment of constituent development team and increased engagement of deans in fundraising - particularly alumni.
- Work with Campaign Cabinet to assess final goal and announcement of public phase of campaign in fall 2018.
- Developing communication and engagement strategies for public phase.



Tax Reform Update

Tax Reform

Charitable Deductions

- The doubling of the current standard deduction will significantly reduce taxpayers who itemize (from roughly 30 percent to 5 percent), effectively eliminating the charitable deduction for 95 percent of Americans
 - The bill raises today's standard deduction for singles to \$12,000 from \$6,500; and it raises it for married couples filing jointly to \$24,000 from \$12,000.

Tax Reform

Athletics

- Prior Law
 - » "...the payor may treat 80 percent of a payment as a charitable contribution where: (1) the amount is paid to or for the benefit of an institution of higher education...and (2) such amount would be allowable as a charitable deduction but for the fact that the taxpayer receives (directly or indirectly) as a result of the payment the right to purchase tickets for seating at an athletic event in an athletic stadium of such institution."
- The new tax law removes that 80% deduction entirely; any contributions that are linked to the right to purchase season tickets will no longer be considered charitable donations.
- The debate is on as to whether this applies to direct seat purchases or a points system.

Tax Reform

Our Response

- Will continue to shift our messages toward the need and impact of philanthropic giving and less on the tax deductibility.
- If possible and necessary, have donors shift giving to more front end loaded strategies than five year pledges.
- Explore an A&T branded donor-advised fund.
- Promote the tax benefits and impact of gift planning, particularly through trusts and annuities.
- Include language on AAF gifts to reflect the change and inform donors to seek the advice of their tax advisor.
- Await further clarification or technical changes regarding the legislation.



The Metrics of Advancement

Key Performance Indicators

Strategic

- Endowment/Student Ratio
- Production/Student Ratio
- Annual Production – Gifts and New Commitments
- Average Annual Production – Three Year Average
- Cost Per Dollar Raised – Overall and Fundraising Staff
- Net Production – Gifts and New Commitments
- Production Per FTE Fundraisers
- Number of Alumni Donors
- Annual Change in Alumni Donors
- Number of \$1K - \$24.99K Gifts/\$25K+ Gifts

Questions?