

UNIVERSITY OF NORTH CAROLINA AT ASHEVILLE
REPORT TO THE FACULTY SENATE
ALUMNI & DEVELOPMENT DIVISION
4 DECEMBER 2008

Submitted by William P. Massey, Vice Chancellor for Alumni & Development
(Prepared November 14, 2008)

Development Overview:

Following is an unaudited summary of gifts and commitments received by the UNC Asheville Foundation between July 1 and November 6, 2008, representing the first 5 months of the fiscal year. Current fiscal years gifts and commitments to date are compared with fiscal year gifts and commitments during the same period in the previous fiscal year.

Cumulative Fundraising Comparison Report: Fiscal Years 2008 & 2009 (July 1 - November 6)

Run Date: November 7, 2008

	<u>FY 2009</u>	<u>FY 2008</u>	<u>Change</u>
TOTAL COMMITMENTS *	\$2,049,013.01	\$2,560,236.67	-20%
TOTAL CASH +	\$1,507,287.97	\$1,680,113.18	-10%
<u>CASH RECEIVED DIRECTLY</u>			
(Planned Giving excluded)			
Total Cash Gifts Received * +	\$682,201.52	\$715,801.83	-5%
Number of Cash Gifts Received	1,329	1,298	2%
Average Cash Gift Amount	\$513.32	\$551.47	-7%
<u>STOCKS RECEIVED AND SOLD</u>			
(Planned Giving excluded)			
Total Amount of Stock Converted to Cash * +	\$3,478.00	\$37,346.81	-91%
Number of Gifts	1	5	-80%
<u>PLEDGES</u>			
Total Pledges Received this period *	\$621,348.52	\$1,199,619.20	-48%
Number of Pledges Received this period	1,093	801	36%
Total Cash received this period against Pledges received this period +	\$379,818.48	\$344,984.84	10%
Total Cash received this period against Pledges received prior to this period * +	\$304,638.98	\$538,776.68	-43%

Total Non Binding Intentions Received this period *	\$	-	\$2,000.00	
Number of NBIs Received this period				1
Total Cash received this period against NBIs received this period +	\$	-	\$	-
Total Cash received this period against NBIs received prior to this period * +		\$33,503.03	\$28,003.02	20%
<u>GIFTS IN KIND</u>				
Total Gifts in Kind Received *		\$195.00	\$23,489.13	-99%
Number of Gifts in Kind Received		3	46	-93%
<u>REAL PROPERTY</u>				
Total Value of Real Property Gifts Received *	\$	-	\$	-
Number of Real Property Gifts Received				
<u>PLANNED GIFTS / EXPECTANCIES</u>				
Total Value of Planned Gifts Secured/Expected *		\$300,000.00	\$	-
Number of Planned Gifts Secured/Expected		2		0
Number of Planned Gifts Secured/Expected, no documentation		0		1
Total Value of Planned Gifts Matured * +		\$103,647.96	\$	-
Number of Planned Gifts Matured		5		
<u>IRA / PPA</u>				
Total Cash received from IRA Gifts Secured Under PPA * +	\$	-	\$15,200.00	
Number of IRA/PPA Gifts matured Under PPA				3

UNC ASHEVILLE FOUNDATION, INC.

The UNC Asheville Foundation Board of Directors met in the Reuter Center on November 20, 2008.

The Foundation approved the Elizabeth Britton Zuniga Scholarship, an estate plan that, in the meantime, will be funded annually by the donor.

Directors received written reports on loan arrangements with BB&T for the North Carolina Center for Health & Wellness (\$850,000) and for the purchase of property on the corner of Merrimon Avenue and W. T. Weaver Boulevard (\$3.5 million).

Ed Towson, chair of the Audit Committee, presented the audit results for the years ended June 30, 2008 and 2007. The audit firm of Burleson & Early, PA conducted the audit. Ms. Burleson indicated that she was presenting a “clean audit.”

Jim Heggglund presented a report of the Endowment/Investment Committee, including a report on the meeting of the UNC Management Company Investment Committee on November 21, 2008.

PERFORMANCE RETURNS AS OF 30 SEPTEMBER 2008

UNC Asheville Foundation, Inc.

<u>Monthly</u>	<u>Fiscal Year</u>	<u>Calendar YTD</u>	<u>Inception+</u>
(5.28%)	(6.66%)	(6.77%)	12.76%

UNC Asheville Endowment

<u>Monthly</u>	<u>Fiscal Year</u>	<u>Calendar YTD</u>	<u>Inception++</u>
(5.28%)	(6.66%)	(6.77%)	0.37%

+ Inception date for UNC Asheville Foundation account is July 1, 2005

++ Inception date for UNC Asheville Endowment account is July 1, 2007

Market Values on 30 September 2008

UNC Asheville Foundation: \$17,362,759

UNC Asheville Endowment: \$ 6,612,976

Combined market value on 30 September 2008: \$23,975,735

Combined market value on 31 August 2008: \$25,288,383

Combined market value on 31 July 2008: \$25,672,337

Mr. Heggglund also reported that at its meeting on Friday, 24 October, the UNC Asheville and UNC Asheville Foundation Endowment/Investment Committee voted to continue the 5% payout rate for the 2009-10 fiscal year. Payout rate is based on the investment performance over a rolling average of the three most recent *complete* fiscal years.

Approximately \$581,000 in scholarship dollars were awarded in the current fiscal year from endowed funds (not including awards from non-endowed, annually funded scholarships).

Two presentations were made to the Foundation Directors: (1) MAP-works, a program for assessing student success and integration (presented by Jackie McHargue, Dean of Students, and John Bucher, Assistant Vice Chancellor for Student Affairs), and (2) “Retirement Today,” (presented by Ron Manheimer, director of the NC Center for Creative Retirement).

MAJOR GIFTS

Following is a summary of the current standing regarding private gifts and pledges (non-governmental funds) to particular capital projects and other programs for which funds are being specifically raised:

A. The GlaxoSmithKline Foundation made a \$250,000 grant as a lead gift to establish a Distinguished Professorship in Chemical Biology. This grant will be leveraged with the Spangler Foundation challenge to cause a \$500,000 match by the NC General Assembly, thus creating a \$1 million distinguished professorship.

B. The Estate of James Topp added to the Topp/Grillot Poetry Writing Endowed Scholarship with an additional gift of \$29,000.

C. The Estate of James Laird supported the Ramsey Library Discretionary Fund with a non-endowed gift of \$55,916.

D. An anonymous donor promised \$100,000 for an endowed scholarship using an IRA beneficiary designation through an estate.

E. The Blue Cross/Blue Shield Foundation of North Carolina has pledged \$300,000 for the North Carolina Center for Health and Wellness. (pledge date Sept. 10, 2008)

F. Frank Giordano has given an additional \$10,478 in support of the Frank and Sylvia Giordano Endowed Scholarship.

G. An anonymous donor has made a \$200,000 estate gift to endow a scholarship in memory of her late daughter.

H. Roy William and the family of Jerry Green have pledged \$100,000 to the North Carolina Center for Health and Wellness.

I. Bank of America Foundation. Through UNC Asheville Foundation Director Michael Andry, we requested \$5,000 to support the GIFT (Getting Into Fitness Together) program. *The Bank of America Foundation approved the request of \$5,000 for support of the GIFT program.*

J. The Wachovia Foundation, through UNC Asheville Foundation Director Robby Russell, was asked to add \$8,333.34 to their endowed scholarship to increase campus diversity. *The Wachovia Foundation has approved our request and given another \$8,333.34.*

The Major Gifts department of Alumni & Development has announced hiring two Major Gifts officers: Jonathan Frappier, previously director of development for NC Stage Company, and Jayme Cooper, previously executive director for development of FolkMoot International.

The major gifts “team” includes Jim Brewer, Jonathan Frappier, Jayme Cooper, Julie Heinitsh, Janet Cone, Wilma Sherrill, Chancellor Anne Ponder and Bill Massey.

ANNUAL GIVING

Alumni: The RuffaloCODY alumni campaign secured 583 pledges totaling \$33,245 through November 11. This represents a 55% increase in the number of donors over last year’s 376 participants. The pledge total is a 36% increase over last year’s \$24,350. We have seen significant growth in the *young alumni non-donor* segment.

Parents: The RuffaloCODY parent campaign secured 214 pledges totaling \$13,461. Our test of calling half of the parents from campus using UNC Asheville students has gone well. We hired and trained 10 students, ranging from freshmen to seniors. As of November 11, combined parent results are \$26,120 from 415 families. At the completion of last year's parent phone-a-thon, we had 444 pledges totaling \$28,645.

National Parents Council: The Parents Council met on October 25. New co-chairs are Jim Jenkins, editorial page editor of the *Raleigh News and Observer*, and Jayne Kieffer, a research scientist. The Council will focus their efforts on student recruitment, student retention, and financial support for the University.

Seniors: The 2009 Senior Class Board hosted the annual Senior Year Kick-off lunch which had a record attendance of more than 150 seniors. Grad Fair officially began the Senior Campaign for December graduates. As of November 11, the campaign has gifts and pledges totaling raised \$835 from 26 donors. The Board is well on their way of exceeding their goal of 22% participation.

ALUMNI OFFICE

The Alumni Office was a partner in the annual opening of school. The Alumni Association continued its sponsorship of Freshman Move-In, now in its sixteenth year. The Alumni Office also distributed welcome packets to new freshman reiterating their membership in the Class of 2012. The Alumni Office also sent similar welcome packets to all of the new transfers and sent both transfers and freshmen the *UNC Asheville Traditions* booklet.

In September, the National Alumni Council held its fall meeting centered on reviewing the Council's work over the last five years and aligning its current goals with the University's Strategic Plan. The Council also met with representatives from Admissions and Athletics to discuss how better to utilize alumni in the continued growth of these operations.

In November, the Alumni Office initiated a "soft roll out" of its new Web site, alumni.unca.edu. Full roll out is planned for December and will include the publication of the revised Alumni E-Newsletter. The new "Alumni Online Community" is a state-of-the-art system for communicating with alumni and friends of UNC Asheville.

For spring, plans are underway for Homecoming 2009, a Black Alumni Reunion, as well as reunions for the Teaching Fellows, Kappa Phi Sorority and Sigma Pi Fraternity. The Alumni Office and the UNC Asheville Career Center will also be sponsoring "How to Find a Job in Charlotte" and Asheville events whereby gradating students network with alumni in both of those cities. The Alumni Office and Career Center will also be conducting the fourth "World of Work" alternative Spring Break trip, this year to Atlanta. Atlanta has the largest concentration of UNC Asheville alumni outside of North Carolina. Two dozen students will explore careers with alumni in Atlanta in a variety of fields.

UNIVERSITY PUBLICATIONS:

In addition to its normal slate of projects (e.g. annual projects for Student Affairs, Admissions, Alumni & Development, etc.), University Publications

worked with a designer, freelancer writers, and University faculty/staff to create the first issue of *UNC Asheville Magazine*. The premier issue was mailed on November 3 to approximately 24,000 constituents and was bundled and polywrapped with the Annual Report for approximately 5,200 donors and 689 faculty/staff. Admissions will send 700 copies to its list of accepted students for fall 2009. An e-announcement was sent to constituents on November 11 to publicize the magazine's launch.

The September and November issues of *Innovations & Collaborations* were each mailed to approximately 24,000 constituents. Additionally, the Office of Admissions distributed 2,000 copies for prospective parents and their students.

The Office of Admissions continues to distribute issues of *Family News*, which was published August. *Family News* is mailed to the parents or family of all currently enrolled students two times a year—April and August.

Print advertisements for the Master of Liberal Arts program's October Open House sessions were designed and placed through in October issues of the *MountainXpress*, *Hendersonville Times-News* and *Asheville Citizen-Times*.

Projects of the University Publications department closely track and support both the University's Strategic Plan and UNC Tomorrow.

UNIVERSITY NEWS SERVICES

Issue Management

News Services participated in communications planning regarding the impact of gasoline shortage on campus, including producing content for campus-wide communications and a dedicated informational web page.

News Services was also an active participant in communications planning regarding the University response to statewide budget cuts.

Elections & the Economy

Local and national elections created numerous media opportunities for our faculty experts. Political Science faculty Bill Sabo, Mark Gibney and Dolly Mullen did a number of interviews with area radio, television and print publications. News stories containing Dr. Sabo's quotes were often picked up by the Associated Press and appeared across the country.

Mass Communications Professor Mark West was interviewed by WLOS-TV regarding the influence of polls on voting behavior and the ongoing, student-staffed Buncombe Poll. Faculty members Ann Weber and Keith Ray were quoted in a *Citizen-Times* article on how to cope with election stress. Physicist Chuck Bennett was interviewed by the *Chicago Tribune* on the authenticity of the holograms used by CNN on election eve. (Answer: No, they were not holograms.)

Economics faculty member Rob Tatum had done a number of live and taped interviews on WLOS-TV regarding the recent economic turmoil.