Advancement Committee of the Board of Trustees
University of North Carolina School of the Arts
Thursday, December 7, 2017
11:00am—12:00pm
Eisenberg Social Hall South
Hanes Student Commons

OPEN SESSION AGENDA

Advancement Committee

*Greer Cawood
*Skip Dunn
*Phillip Horne
Tom Kenan, Emeritus
*Michael Tiemann (ex-officio)
*Erna Womble
*Ralph Womble, Chair
*Anna Folwell

Al Crawford, Alumni Representative
Jim DeCristo, Vice Chancellor for Economic Development & Chief of Staff
Edward Lewis, Vice Chancellor for Advancement
Cindy Liberty, Foundation Executive Director
Jim Martin, Foundation Board Liaison
Marissa McCullough, Staff Council Representative
Savannah Stanbery, Dev. Assoc. /Exec. Assistant to the CAO
Anne Sessions, Board of Visitors Liaison
Lauren Whitaker, Staff Council Representative

*Denotes voting members

- Welcome, Confirm Quorum
  Ralph Womble
- Approval of the September 21, 2017 Minutes
  Ralph Womble
- Advancement Update
  - Campaign
    - Campaign Committee on Leadership
    Edward Lewis
    - Campaign Buckets
  Cindy Liberty
- UNCSA Foundation Board
  Anne Sessions
- UNCSA Board of Visitors
  Ralph Womble
- Other Business
  Ralph Womble
- Adjourn
  Ralph Womble
Advancement Committee of the Board of Trustees
University of North Carolina School of the Arts
Thursday, September 21, 2017
11:00 a.m.-12:00 p.m.
Eisenberg Social Hall South-Hanes Student Commons

Minutes

Trustees Present
*Greer Cawood
*Skip Dunn
*Phillip Horne
Tom Kenan, Emeritus (via phone)
Mark Land
*Michael Tiemann (ex-officio)

*Erna Womble
*Ralph Womble, Chair
*Anna Folwell

Denotes voting members

Administrators, Liaisons, Faculty, Staff Present
Amanda Balwah, University Secretary
Jim DeCristo, Vice Chancellor for Economic Development & Chief of Staff
David English, Executive Vice Chancellor and Provost
Martha Golden, Faculty Council Representative
Corynn Kolberg, Major Gifts Officer
David Harrison, General Counsel
Wiley Hausam, Managing Director of Performance Facilities
Cindy Liberty, Foundation Executive Director
Edward Lewis, Vice Chancellor for Advancement
Corey Madden, Executive Director of the Thomas S. Kenan Institute for the Arts
Savannah Stanbery, Executive Assistant to the VCA / Development Associate
Anne Sessions, Board of Visitors Liaison
Amy Werner, Manager of Alumni

Convene Meeting and Opening Remarks
Board of Trustees Advancement Chair Ralph Womble convened the September 21, 2017 meeting of the Advancement Committee of the University of North Carolina School of the Arts Board of Trustees at approximately 11:01 a.m.

Approve Minutes from April, 2017 Meeting
Ralph Womble called for a motion to approve the minutes. Phillip Horne moved; Greer Cawood seconded. The minutes were approved as presented.

Advancement Report
Vice Chancellor for Advancement Ed Lewis provided the Advancement report.

FY17 Overview:
- Total dollars raised was $18,253,008. While this 97% increase over the previous year includes the anonymous $10 million gift, there is an overall increase in giving outside of this gift.
- ROI: $1 spent = $10.47 raised.
- Annual Fund dollars raised in FY16 was $628,346, this was nearly $100,000 over our goal of $530,000.
  - Even with the large realized bequest from Clyde Fowler's estate, we were still approximately $20,000 over our Annual Fund goal.
- The market value of our combined State and UNCSA Foundation endowments is $56,487,769 as of 6/30/17.
- There was an increase in reachable alumni giving from 2.8% in FY16 to 3.93% in FY17.
- Overall one-year donor retention rate from FY16 to FY17 is 47.08%. The 2016 industry standard is 45%.
- 997 total new donors; 124 new alumni donors.
- Net proceeds from the two major scholarship fundraising events were:
  - $71,000 from Next/Now (goal was $50,000)
  - $275,000 from Nutcracker
One note on the FY17 year-to-date fundraising report, the anonymous $10 million gift was sitting in Temporarily Restricted until we could post the endowment portion of the gift to Permanently Restricted.

FY18 year-to-date Fundraising:
- We are slightly behind in our variance from projection for unrestricted revenue. This is due to the staffing transition. We will work to make this up as soon as our new Manager of Annual Giving arrives.
- We are on track to meet our goals in Temporarily Restricted and Permanently Restricted revenue.
- Currently, there are no Gifts in Kind reported on the State side, but that will likely change this year especially with Design & Production working with Cirque du Soleil.
- Permanently Restricted funds on the State-side will be where we allocate gifts such as endowed professorships that have matching support from the State.

Donor Cultivation and Solicitations
- The Chancellor, Vice Chancellor for Advancement, and Advancement staff continue to cultivate and solicit major gift donors and prospects.
- We are working on closing several seven figure major gifts which should be reflected in the December revenue chart.

Staffing:
- Corynn Kolberg joined the Advancement team in July as a Major Gifts Officer. She came to us from Wake Forest University.
- Amy Werner moved into the role of Manager of Alumni Relations this past July.
- Advancement has hired a new Annual Giving Manager. Jaclyn Day’s first day is September 25. All current positions in the division are filled.

Events:
- Donors, alumni and community leaders will be invited to a welcome reception for the new Dean of Drama Scott Zigler on October 27. Members of the Drama Dean’s Council will meet him over dinner on October 20.
- We are continuing to work with Sue Henderson and Team NextNow to cultivate new UNCSA supporters. Three events are planned for this group this year, including one joint event with Giannini Society.
- This year’s Scholarship Luncheon will be held at Forsyth Country Club. This move allows us to expand and elevate this important stewardship and recognition event, and allows us to include more donors and students.
  - The Scholarship Luncheon will be on Wednesday, March 28.
- NextNow 2018: Unleashed will be held on Saturday, April 28, 2018 at the Benton Convention Center. This year’s event features the UNCSA Symphony Orchestra’s final concert of the year: “Fantastic Finale: A Celebration of the Class of 2018.” Conducted by Christopher James Lees, the program will feature the best of the best ensembles and soloists in the School of Music graduating class. Witness this next generation of artists unleash their creative prowess in their final UNCSA performance and help us send them off to make their impact on the arts.
  - The featured guest artist will be Warren Jones, 2010 Musical America “Collaborative Pianist of the Year,” with students from the A.J. Fletcher Opera Institute. Mr. Jones is an internationally renowned pianist who has frequently performed in Carnegie Hall and the White House and with many of today’s best-known artists.
  - Tickets will go on sale at the end of September/early October for $75/ticket and $1,000/table.
  - Currently have one sponsor: Blanco Tackabery.
- We have at least six alumni connected to the Broadway revival of the musical Once on this Island. This includes recent graduate Isaac Powell in the lead role (Drama ’17) and renowned choreographer and 2001 Dance alumna Camille Brown.
  - Previews begin in November and the show opens in December.
- A.J. Fletcher Opera Institute Fellows perform scenes from the repertoire. Conducted by guest artist Warren Jones with stage direction by Nic Muni.
  - Tuesday, November 7, 2017 | 7:30 p.m. - 9:30 p.m. at Duke Energy Center for the Performing Arts in Raleigh.
Carolina Performing Arts presents *Cold Mountain*, September 28 and October 1 at Memorial Hall. Megan Cleaveland, an alumna from the Fletcher Opera Fellows, is performing the role of Lila.

- **UNCSA Foundation Board**
  Foundation Director Cindy Liberty gave the following report:
  - The FY17 audit is completed and was accepted on September 17. There were no findings.
  - Fieldwork has been completed for the Semans Art Fund, we are just waiting on final financial statements from the auditors.
  - The UNCSA Foundation is currently working on the 990s, due in November.
  - The Finance Committee reviewed campaign accounting versus GAAP accounting to discuss what counts toward the campaign. What hits the financials and what hits the campaign financials are not always going to be the same.
  - Bill Watson presented an endowment spending graph to the Finance Committee. Endowment distribution is counted on October 31, but the money remains invested in the fund until June 30. We are tracking whether to leave it or pull it out earlier. Leaving it has increased our ability to grow that money over the past few years. The policy seems to be holding well and our distribution has been able to grow at a steady rate.
  - The Executive Committee approved Budget for FY 2018 after intense vetting by the Finance Committee.
  - Lee LaVallee, Mark Oliver, and Michael Ryden retired from the board and were honored on September 7, 2017.
  - Foundation Board expanded from 21 to 25 members. This will help increase the number of people on Advancement Committee and on the Special Projects Committee.
  - New Board Members are Bettye Barrett, Art Bloom, Rob Simon, Chrystal Parnell, David Broughton, Jim Ruffin, and Andy Schneider. New board member orientation will be in October.
  - John Wigodsky has stepped up as Treasurer and Taylor Shipley as Assistant Treasurer.
  - Board Giving is back up to 100%. Last year (FY17) the board gave a total of $238,000.
  - Thomas S. Kenan Institute for the Arts revenue is now included in the Advancement Fundraising Report.

- **UNCSA Board of Visitors**
  Board of Visitors Chair Anne Sessions gave the following report:
  - The New Member Orientation scheduled for September 11 was postponed until October 5 due to Hurricane Irma. They will welcome 12 new members.
  - Board of Visitors is implementing BoardMax, a board management software. This software is also used by the Foundation Board with great success.
  - On September 23, the Board of Visitors’ Alumni Committee will host a first-ever family fun day at the farm for local alumni. We currently have 125 who have RSVP’d.
    - The group will meet Amy Werner, Manager of Alumni Relations.

**Approval of MOUs**
Vice Chancellor for Advancement Ed Lewis presented MOU’s for the Chancellor’s Discretionary Fund and the Kenan Institute for the Arts Operating Fund. There have been no changes since the last approval. This annual approval process allows for the UNCSA Foundation to have fiduciary responsibility over these funds.

- Ralph Womble called for a motion for approval, Phillip Horne moved, Erna Womble seconded.
- The board approved the MOU’s for the Chancellor’s Discretionary Fund and the Kenan Institute for the Arts Operating Fund as presented.

**Adjourn Meeting**
Ralph Womble called for a motion to adjourn, Anna Folwell moved, Greer Cawood seconded. The meeting was adjourned at approximately 11:35 a.m.
Office of Advancement Report

- Financial Report: FY18 Update – An update will be provided during the Advancement Committee Meeting.

- (1) UNRESTRICTED
  - Annual Fund
    - As of November 6, we are at 19% of our revenue goal with $108,226 from 227 gifts. We are right on track with last year’s numbers. This also solidifies our five year trend that is steadily increasing.
    - The last quarter of the calendar year, especially December, is our busiest time for Annual Giving. Our first direct mail piece will arrive in mailboxes mid-November with a follow up piece dropping in mid-December. We will also send several email appeals around #GivingTuesday (November 28) and the last two weeks of December.
    - An important date to keep in mind is our Day of Giving which is tentatively scheduled for the first week of April 2018.

- (2) TEMPORARILY and PERMANENTLY RESTRICTED An update will be provided during the Advancement Committee Meeting

- (3) Donor Cultivation and Solicitations
  - Major Gifts
    - The Advancement Major Gifts team has held almost 90 visits with major gifts donors since the beginning of the fiscal year. These efforts have yielded several five and six-figure gifts and have helped to identify and secure deferred gifts.

- Staffing
  - Jaclyn Day, Manager of Annual Giving
    Jaclyn comes to us from Guilford College where she was Director of Annual Giving. Prior to that she was Development Manager for the Winston-Salem Symphony and Membership Coordinator for WSNC 90.5FM. She has seven years annual giving experience in higher education and arts based nonprofits. Statistical analysis is a love of hers which has enabled her to re-imagine the donor experience and move forward in new giving programs. She received her undergraduate degree from Brigham Young University in 2010 and her Master’s in Nonprofit Management and Philanthropy in 2012 from Bay Path College in MA.

- Comprehensive Campaign Update
  - The Campaign Committee on Leadership has met three times to review donor/prospect lists to identify the top 100-150 major gift donors for the campaign. The committee also provided cultivation strategies for these donors.
  - The committee has reviewed preliminary campaign case statement documents.
• **Events**
  - December 8, the Board of Trustees is invited to attend the opening night celebration for *The Nutcracker*. If you didn’t RSVP in advance, please confirm your attendance with the Advancement Office as soon as possible.
  - In November, we held two fundraising events:
    - The Foundation Board’s Guest Artist Luncheon Series was held on November 8 at the Milton Rhodes Center. It was a lovely afternoon enjoyed by 121 attendees. Our featured guest artist collaborative pianist Warren Jones, along with Nic Muni, Kathleen Felty and Andrew Rene of the A.J. Fletcher Opera Institute demonstrated the importance and impact of guest artist residencies at UNCSA. There were three presenting sponsors—Allegacy, Blanco Tackabery and PNC. The event raised approximately $11,000 for endowment and spendable funds for the Guest Artist Endowment.
    - The Hamlin Scholarship Benefit was held on November 9. The Hamlin Committee celebrated 10 years of the Hamlin Scholarship and the Chancellor announced that we exceeded the endowment goal of $300,000. Andrew and Mary Perkins received a special gift from the Chancellor in recognition of their steadfast devotion to and outstanding leadership of the Hamlin Scholarship Committee.
  - Plans are underway for the Giannini Society’s Trip to Washington DC, May 12-15. Members of Giannini will have the opportunity to experience all that the DC arts scene has to offer with a special UNCSA twist. If you’re not yet a member of the Giannini Society, sign up so you can be a part of this awesome opportunity to meet alumni and experience their impact on the arts in our nation’s Capital firsthand.
  - Christopher Lees joins us December 8 to share information about the NextNow performance, which will be held on Saturday, April 28.

• **Alumni Relations**
  - In October, UNCSA held a town hall for Drama alumni in NYC to meet new Drama Dean Scott Zigler. Nearly 80 alumni rsvp’d for the event, which was held at the Telsey & Co. offices in Times Square. A town hall for alumni based in the LA area will be held in February around auditions. Manager of Alumni Relations Amy Werner is working with a group of alumni to set up a Drama Alumni Council to advise Dean Zigler and to help keep him informed of and more closely connected to alumni activities and interests.
  - We also welcomed back the Drama Class of 2007 for their 10 year reunion. You might recognize some of the names from that class- Billy Magnussen, Matt Lauria, Nick Gonzalez and Blake Cooper Griffin.
  - The alumni office also worked with the Kenan Institute to welcome back approximately 20 alumni from the Kenan Fellows program for a convening that examined their careers since leaving campus – identifying key moments that influenced their careers or career transition.
  - In November, we held a meet and greet with the alumni connected to the *Once On This Island* revival in New York City following the preview show on Nov. 17. Between 20 and 30 people joined us. Manager of Alumni Relations Amy Werner also met with the 5 alumni in the cast and crew of the Spongebob Musical on Broadway after their show that same weekend.
In December, alumnus Isaac Klein,’06 will be on campus for a talkback with Dean Emeritus Gerald Freedman and current dean Scott Zigler regarding his new book “The School of Doing: Lessons from Gerald Freedman”. After the talkback, Mr. Klein be available to sign copies of the book. Isaac is generously donating half of his profits from the sale of the books to the Gerald Freedman Endowed Fund for Excellence, which provides scholarship support on campus.

We've also begun a new regular feature on the Alumni Facebook page called the Faces of UNCSA. We ask the same five questions and feature a different alum each week.

**UNCSA Foundation Board Report**
- **Finance Committee**
  - Reviewed the UPMIFA spending policy.
  - Reviewed first quarter financial statements.

- **Executive Committee**
  - Hired legal counsel to create guidelines and templates for grants.

- **Advancement Committee Report**
  - Guest Artist Luncheon Series (GALS) event was successful.
  - The GALS event had three sponsors: Allegacy, Blanco Tackabery, and PNC.
  - Five tables were sponsored.
  - Estimated that the event will net $11K; $7K for Endowment and $4K for spendable.

- **Audit Committee Report**
  - 990 is being reviewed and should be approved at November board meeting.

- **Foundation Board**
  - Board Meeting was November 16, 2017.

- **Semans Art Fund**
  - 990 is complete and filed.

**UNCSA Board of Visitors Report**
- The New Board Member Orientation took place on October 5 followed by a reception and performance for all Board of Visitors (BOV) members.
- The fall Board Meeting was held on October 6.
  - The board heard updates from UNCSA leadership as well as approved edits to the by-laws and the transition in leadership.
  - Sue Henderson will serve as the new Chair of the Board of Visitors beginning in the new calendar year.
- On September 23, the Board of Visitors Alumni Committee hosted a family fun day at Anne and Steve Sessions’ farm in Advance. Alumni and their families were able to meet the new alumni manager, Amy Werner, and enjoy fun in the sun with hay rides, face painting, bubbles, corn hole, food and drinks and the biggest hits of the day- fishing and meeting the Pickle!
Face Painting materials were supplied by a donation from BOV Member Emeritus Michael Pulitzer.

Approximately 100 people attended the event.

The Advocacy Committee participated in several opportunities to advocate on behalf of the arts this semester through digital media campaigns. The committee is looking forward to participating in Arts Day again in May.

As of October 30, 2017, 97% of current board members support UNCSA with a financial gift and 70% are members of the Giannini Society. Our goal for this fiscal year is to achieve 100% board giving to UNCSA as well as strong participation in the Giannini Society.
## ADVANCEMENT INTERNAL REPORTING

**FY18 Year-to-Date Fundraising**

### University of North Carolina School of the Arts Foundation

#### Unrestricted

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<th>Y-T-D</th>
<th>Prior Year Actual 10/31/2016</th>
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<th>Y-T-D Actual 10/31/2017</th>
<th>Variance from Prior Year</th>
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<th>FY 2018 Budget</th>
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<td><strong>Revenues</strong></td>
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#### Temporarily Restricted

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<td><strong>Total Revenues</strong></td>
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<td><strong>$666,666.60</strong></td>
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## ADVANCEMENT INTERNAL REPORTING

**FY18 Year-to-Date Fundraising**

### University of North Carolina School of the Arts

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<td>Current Endowment Gifts</td>
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### University of North Carolina School of the Arts

**Thomas S. Kenan Institute for the Arts**

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**UNAUDITED**
ADVANCEMENT INTERNAL REPORTING
FY18 Year-to-Date Fundraising

YEAR-TO-DATE REVENUE AS OF 10/31/17

UNAUDITED
Winter 2017 - Key Events

**December 2017**

4-15  Intensive Arts
1-24  Drama students perform w/ Triad Stage *A Christmas Carol*, Hanesbrands
7-8   Board of Trustees Meeting
8    *The Nutcracker* Opening Night Reception & Performance

**SPRING SEMESTER**

**January 2018**

4     School of Drama Showcase, Chicago
12    **Board of Visitors Reception and Jazz Ensemble performance**
24    **Giannini Stage Door Designer Panel and Reception**
25-26 Board of Governors Meeting
27    Associates’ Mozart’s Birthday Concert and Dessert Reception

**February 2018**

2     **Jenny Semans Koortbojian Reception and Opera Performance**
8-9   Board of Trustees Meeting
14-25 Drama students perform w/ Triad Stage *Our Town*, Hanesbrands

*Items in BOLD are Advancement/Donor Events.*