

# ADVANCEMENT INTERNAL REPORTING

## FY20 Year-to-Date Fundraising

<b>University of North Carolina School of the Arts Foundation</b>						
Unrestricted						
	Y-T-D		Y-T-D			
	Y-T-D Actual	Y-T-D	Prior Year	Variance	Variance from	FY 2020
	3/31/2020	Budget	Actual	From Budget	Prior Year	Budget
	3/31/2020	3/31/2020	3/31/2019			
<b>Revenues</b>						
Gifts and Grants	\$609,267.88	\$439,500.00	\$1,606,869.82	\$169,767.88	(\$997,601.94)	\$590,000.00
Miscellaneous income	\$3,172.00	\$0.00	\$2,086.00	\$3,172.00	\$1,086.00	\$0.00
<b>Total Revenues</b>	<b>\$612,439.88</b>	<b>\$439,500.00</b>	<b>\$1,608,955.82</b>	<b>\$172,939.88</b>	<b>(\$996,515.94)</b>	<b>\$590,000.00</b>

<b>University of North Carolina School of the Arts Foundation</b>						
Temporarily Restricted						
	Y-T-D		Y-T-D			
	Y-T-D Actual	Y-T-D	Prior Year	Variance	Variance from	FY 2020
	3/31/2020	Budget	Actual	From Budget	Prior Year	Budget
	3/31/2020	3/31/2020	3/31/2019		Actual	
<b>Revenues</b>						
Current Scholarship Gifts	\$569,083.94	\$687,726.67	\$592,413.58	(\$118,642.73)	(\$23,329.64)	\$828,635.60
Gifts and Grants	\$2,259,337.92	\$1,656,487.88	\$2,720,933.94	\$602,850.04	(\$461,596.02)	\$2,257,892.19
Miscellaneous income	\$154,487.42	\$195,416.66	\$158,254.92	(\$40,929.24)	(\$3,767.50)	\$260,000.00
<b>Total Revenues</b>	<b>\$2,982,909.28</b>	<b>\$2,539,631.21</b>	<b>\$3,471,602.44</b>	<b>\$443,278.07</b>	<b>(\$488,693.16)</b>	<b>\$3,346,527.79</b>

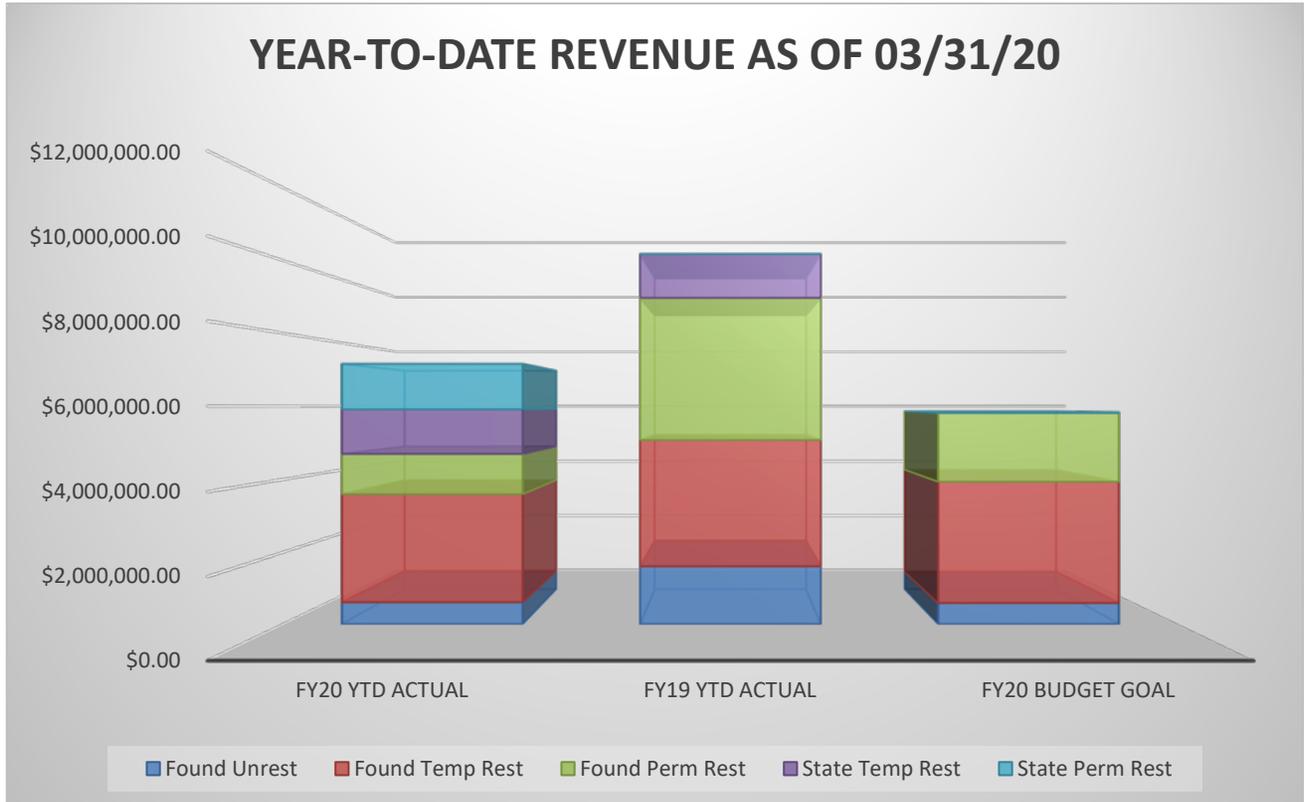
<b>University of North Carolina School of the Arts Foundation</b>						
Permanently Restricted						
	Y-T-D		Y-T-D			
	Y-T-D Actual	Y-T-D	Prior Year	Variance	Variance from	FY 2020
	3/31/2020	Budget	Actual	From Budget	Prior Year	Budget
	3/31/2020	3/31/2020	3/31/2019		Actual	
<b>Revenues</b>						
Current Endowment Gifts	\$1,105,749.06	\$1,416,749.84	\$3,892,932.20	(\$311,000.78)	(\$2,787,183.14)	\$1,889,000.00
<b>Total Revenues</b>	<b>\$1,105,749.06</b>	<b>\$1,416,749.84</b>	<b>\$3,892,932.20</b>	<b>(\$311,000.78)</b>	<b>(\$2,787,183.14)</b>	<b>\$1,889,000.00</b>

# ADVANCEMENT INTERNAL REPORTING

## FY20 Year-to-Date Fundraising

<b>University of North Carolina School of the Arts</b>						
Temporarily Restricted (Includes Thomas S. Kenan Institute for the Arts)						
	Y-T-D		Y-T-D	Prior Year		
	Y-T-D Actual	Budget	Actual	Actual	Variance	Variance from
	3/31/2020	3/31/2020	3/31/2020	3/31/2019	From Budget	Prior Year Actual
						FY 2020 Budget
<b>Revenues</b>						
Gifts and Grants	\$1,169,292.00	\$0.00	\$1,137,563.00	\$1,169,292.00	\$31,729.00	\$0.00
Gifts and Grants - Gifts in Kind	\$36,878.25	\$0.00	\$65,963.93	\$36,878.25	(\$29,085.68)	\$0.00
Miscellaneous income	\$250.00	\$0.00	\$0.00	\$250.00	\$250.00	\$0.00
<b>Total Revenues</b>	<b>\$1,206,420.25</b>	<b>\$0.00</b>	<b>\$1,203,526.93</b>	<b>\$1,206,420.25</b>	<b>\$2,893.32</b>	<b>\$0.00</b>

<b>University of North Carolina School of the Arts</b>						
Permanently Restricted						
	Y-T-D		Y-T-D	Prior Year		
	Y-T-D Actual	Budget	Actual	Actual	Variance	Variance from
	3/31/2020	3/31/2020	3/31/2020	3/31/2019	From Budget	Prior Year Actual
						FY 2020 Budget
<b>Revenues</b>						
Current Endowment Gifts	\$1,250,000.00	\$0.00	\$0.00	\$1,250,000.00	\$1,250,000.00	\$0.00
<b>Total Revenues</b>	<b>\$1,250,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$1,250,000.00</b>	<b>\$1,250,000.00</b>	<b>\$0.00</b>



### **Annual Giving**

- Day of Giving, initially scheduled for March 19, had a strong start, with 68 donors giving over \$22,000 in pre-event giving.
  - o However, as we approached March 19, we chose to postpone this initiative due to COVID-19.
  - o We are tentatively looking at a new date at the end of June.
- We will be implementing a new online giving platform to help strengthen our online presence.
  - o This platform will allow us to create customized giving pages for a wide variety of projects as well as create a landing page for Day of Giving.
    - Our first page will be focused on the Student Emergency Fund.
- We are pleased to announce that John and Mary Lynn Wigodsky are this year's Giannini Award recipients.
  - o Their commitment to the school as volunteers, patrons, and donors has made a profound impact on UNCSA.
- Review of FY20 Fundraising as of 3/31/20 (*The report is included.*)
  - o Foundation Giving (includes new cash gifts and pledges only)
    - We have exceeded our Unrestricted Revenue goal for the year due to continued campaign fundraising and early gifts via the Day of Giving, which was postponed.
    - Temporarily Restricted Revenue is on track to meet its goal. We have focused immediate fundraising efforts on the Student Emergency Fund and the Pickle Pantry.
    - Permanently Restricted Revenue is behind budget projections. We anticipate getting close to but potentially not meeting this goal.
  - o Review of State Giving
    - The Thomas S. Kenan Institute for the Arts continues its strong fundraising efforts.
    - Permanently Restricted Revenue is in a good position with support for endowed professorships.
  - o Overall FY20 Fundraising Goal
    - As of March 31, we have exceeded our \$5.8 million goal by over \$1.3 million.

### **Comprehensive Campaign**

- As of mid-April, we have exceeded our published campaign goal raising over \$65.5 million!
- The Campaign Leadership Circle met at the end of February to discuss next steps concerning the goal, details about increasing the goal will be forthcoming.
- Fundraising efforts continue to move forward in a manner appropriate to the times.

### **Staffing Update**

- Due to Covid-19 precautions and in following UNCSA's HR guidelines, the search for Major Gift and Planned Giving Officer has been put on hold.

### **Events**

- Interim Chancellor Cole hosted nearly 50 members of the Chancellor's Circle, those donors who give \$25,000 annually to UNCSA, for dinner at the Chancellor's Residence on March 4.
  - o It was a wonderful evening and included special performances by School of Music students Luca Kevorkian and Morgan Hunkele.
- In preparation for the Annual Scholarship Luncheon, the Advancement Office led a Coaching Session with the scholarship students to prepare them for meeting with their scholarship donors.
  - o At this event, students wrote notes to their donors to share how they excited they were to meet later that month.
- Following COVID-19 precautions, all remaining events for the spring semester were canceled or postponed, including:
  - o March 25 Annual Scholarship Luncheon.
    - This event would have been the highest attended Luncheon to date with 253 registered attendees.

- Guests would have enjoyed a performance by School of Music student Luca Kevorkian and remarks by School of Drama student Kate Pittard.
- Although the event did not happen, the UNCSEA Advancement Office has been working with scholarship students to continue to steward and recognize our scholarship donors through thank you letters, emails and video messages.
- o April 25 NextNow Scholarship Fundraiser.
  - We are tremendously appreciative for all the support we have received for this event, including from the many patrons who have converted their ticket or sponsorship purchases into 100% tax-deductible contributions for NextNow scholarships.
- o May 13 LA Campaign Launch.
  - We hope to celebrate the *Powering Creativity* campaign with donors and alumni in Los Angeles, CA when it is safe to do so.

### **Alumni Relations**

- We are excited to announce a new UNCSEA magazine will be hitting mailboxes at the end of April.
  - o It's called Scene, and the first issue will feature the UNCSEA connections to the revival of *West Side Story* on Broadway and to the Steven Spielberg movie.
    - The feature article is written by Drama alumnus Isaak Klein.
  - o Thanks to Strategic Communications for all the work involved in getting this ready for print.
- As with many other things this semester, our alumni activities were postponed and/or canceled because of the Coronavirus.
  - o We are rescheduling the Class of 1970's Golden Pickle reunion to next year and will combine the Class of 1970 with the Class of 1971.
- We do want to recognize Lauren Ward (Drama 1992) for her Olivier Award nomination for Best Supporting Actress for her role in London's version of *Dear Evan Hanson*.
  - o The Olivier Awards, like many other things, has been cancelled.
  - o The awards will be presented in an alternate format, most likely in the fall.
- The Alumni Office and the folks in Strategic Communications have put up pages on the Alumni website showing which alumni are connected to the shows on different streaming platforms and are adding connections on a regular basis.
  - o So if you are looking for something to watch, check out the page (<https://www.uncsa.edu/alumni/alumni-streaming/index.aspx>) and support their work.
  - o If you know of something that is not on the list, please let Manager of Alumni Relations Amy Werner know.
- There is also a resources page for alumni who have lost their income due to the pandemic.
  - o The page provides links to those organizations that can offer funding nationwide as well as links to state organizations where we have the highest number of alumni living.
- The Alumni Office is continuing to explore ways in which to engage alumni digitally until we are able to host in-person gatherings and events again.

### **UNCSEA Foundation Board**

- The Finance Committee meets at the end of April to review the budget draft for FY 2021.
- The full Foundation Board met virtually on March 26 via WebEx.
- Board Development
  - o Actively recruiting board members for open slots and upcoming board retirements.
  - o Meetings with potential board members were interrupted due to COVID-19, but some nominations will move forward at the June Board meeting.
- Advancement Committee Report
  - o Current fiscal year board member giving is at 100%. Total dollars given is 262% over last fiscal year.
- Audit Committee Report

- o The Audit Committee was on schedule to go out for bid this year. Due to COVID-19, a 1-year agreement has been approved to hold fees at the same dollar amount as the previous fiscal year with Smith-Leonard, PLLC.
- o Smith-Leonard has been the audit firm for the UNCSA Foundation since FY 2010 and the audit committee has been pleased with their work and professionalism.
- o The Audit Committee did not have any reason to change firms, so the 1-year contract agreement does not disrupt any plans.
- Semans Art Fund
  - o The Semans Art Fund Board met on April 3.
  - o Due to COVID-19, the board decided to allow students the opportunity to submit a new project for the current year instead of trying to award based on the grants submitted prior to the pandemic lock-down.
  - o The only grant made at the April 3 meeting was \$10,000 to the UNCSA Student Emergency Fund.
  - o The Semans Art Fund Board will meet on May 4 to review the new grant submittals, which are due from students by April 24.

### **UNCSA Board of Visitors**

- Due to the Covid-19 response, the Board of Visitors met virtually via Zoom on Thursday, April 16.
  - o The Board approved 7 new board members:
    - Kami Chavis
    - Matt Harris, '94
    - Joe Logan
    - Shreita Powers
    - Lee Thompson
    - Vicki Threlfall
    - Nancy Trovillion
  - o We look forward to celebrating the service of those rotating off the board as soon as we are able.
- This was Chair Sue Henderson's final meeting. She will rotate off the board at the end of the fiscal year and Anne Rainey Rokahr will serve as the incoming Chair.
  - o We hope to celebrate this transition when we are able.
- Interim Provost Karin Peterson joined the meeting to give an Academic Update and Chief of Staff Jim DeCristo gave an Advocacy update from the State.