

University of Central Arkansas™

UCA Foundation & UCA Advancement Update

*UCA Faculty Senate
September 25, 2014*



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UCA Foundation & UCA Advancement Financial Highlights

	<u>2012-13</u>	<u>2013-14</u>
Total Gifts	\$3,831,542	\$5,138,934
Total Donors	4,020	4,455
Total Assets	\$34,975,035	\$40,912,635
Endowment	\$21,064,960	\$22,296,489
Benefit to UCA	\$4,489,718	\$4,061,808
Scholarships	\$590,380	\$644,912

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Giving Slides

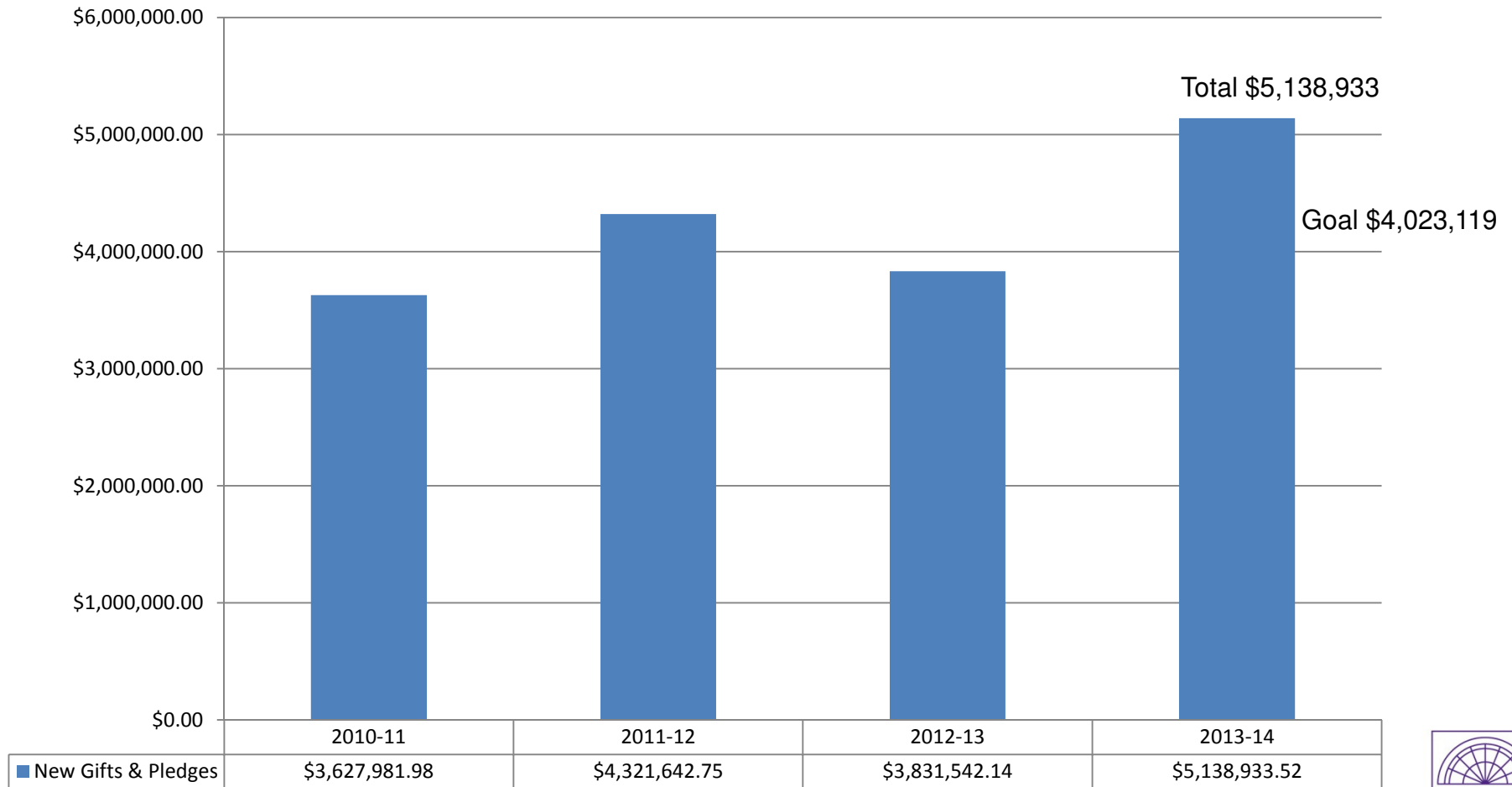
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Total Giving FY11 - FY14



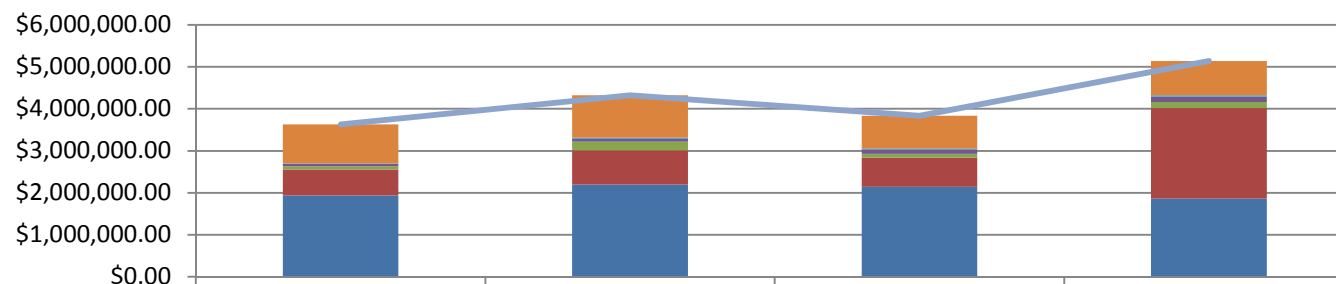
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Total Giving by Production Area FY11 - FY14



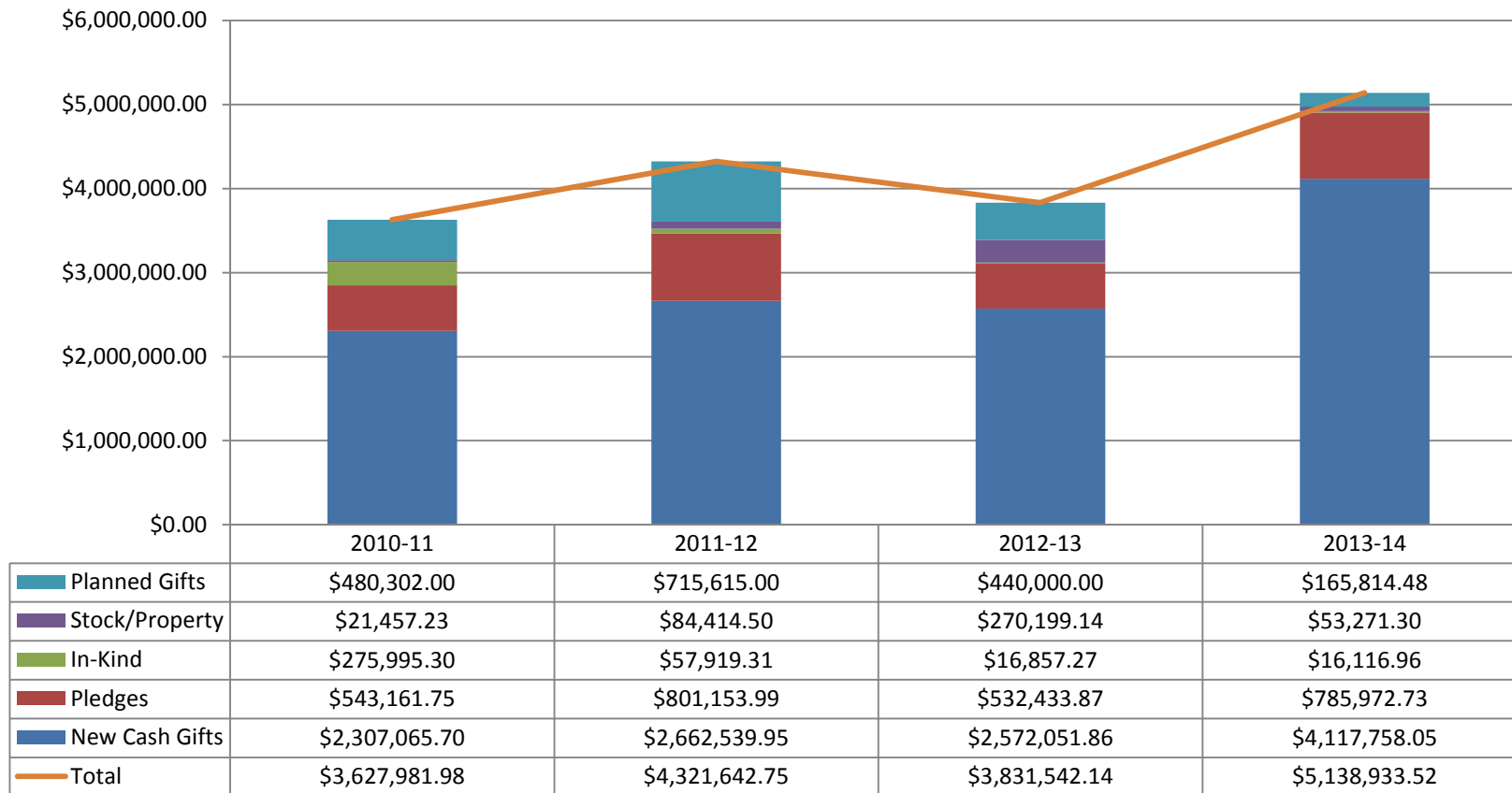
	2010-11	2011-12	2012-13	2013-14
Athletics	\$925,154.22	\$1,004,881.52	\$771,947.07	\$815,412.16
Reynolds	\$10,294.00	\$29,580.96	\$27,906.13	\$30,187.55
Shakespeare Theatre	\$58,633.00	\$66,535.00	\$105,751.00	\$130,865.00
Advancement - Alumni Services	\$77,639.89	\$211,611.22	\$88,331.68	\$146,234.71
Advancement - Other Giving*	\$615,214.66	\$815,742.24	\$692,680.04	\$2,153,036.47
Advancement - Development Officers	\$1,941,046.21	\$2,193,291.81	\$2,144,926.22	\$1,863,197.63
Total	\$3,627,981.98	\$4,321,642.75	\$3,831,542.14	\$5,138,933.52

*Other Giving includes grants/donations from constituents not managed by a development officer or reported in another category such as Arkansas Shakespeare Theater. Other Giving was previously referred to as “Unassigned Giving”.

NOTE: Most of the Athletic Skybox payments were received in 2011-12 which affected Athletics total giving by \$602,500. Also in 2011-12, we opened up the Legacy Brick program to all alumni instead of recent graduates only. This resulted in a marked increase in Alumni Services total giving with 1,366 bricks sold many being first-time donors. Additionally, we did not hold a phonathon in spring 2013, and we were operating with one less major gift officer which affected total giving, donor numbers and giving percentages.

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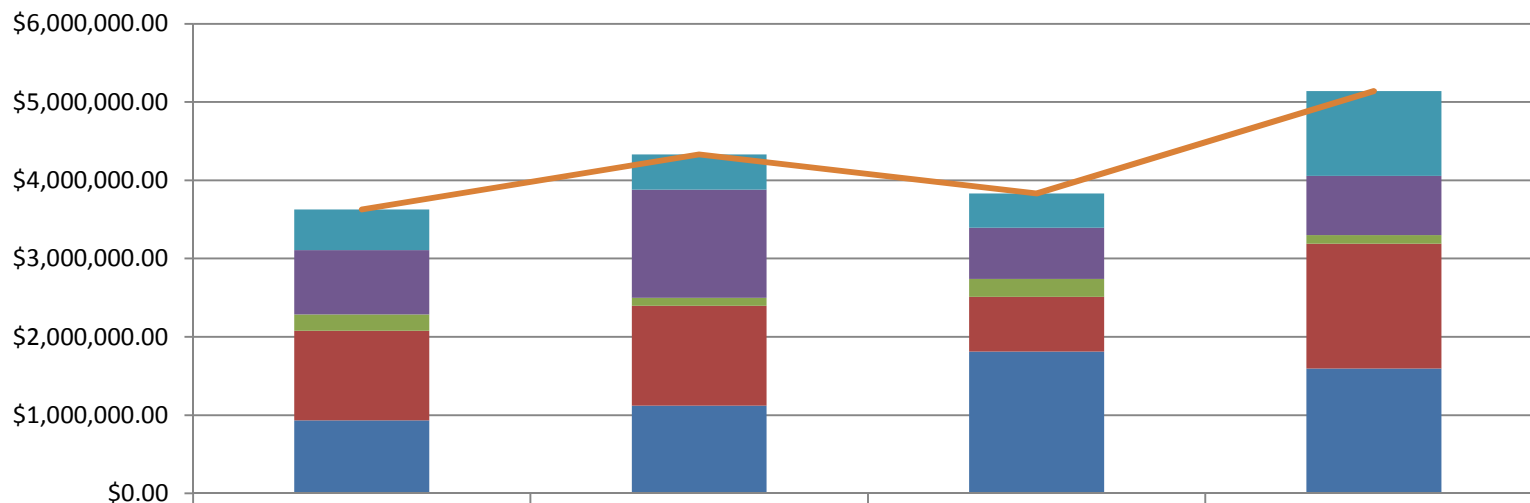
Total Giving by Gift Type FY11 - FY14



NOTE: The majority of Planned Gifts are bequests; however, other Planned Giving instruments are also included.

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Total Giving by Constituent Type FY11 - FY14

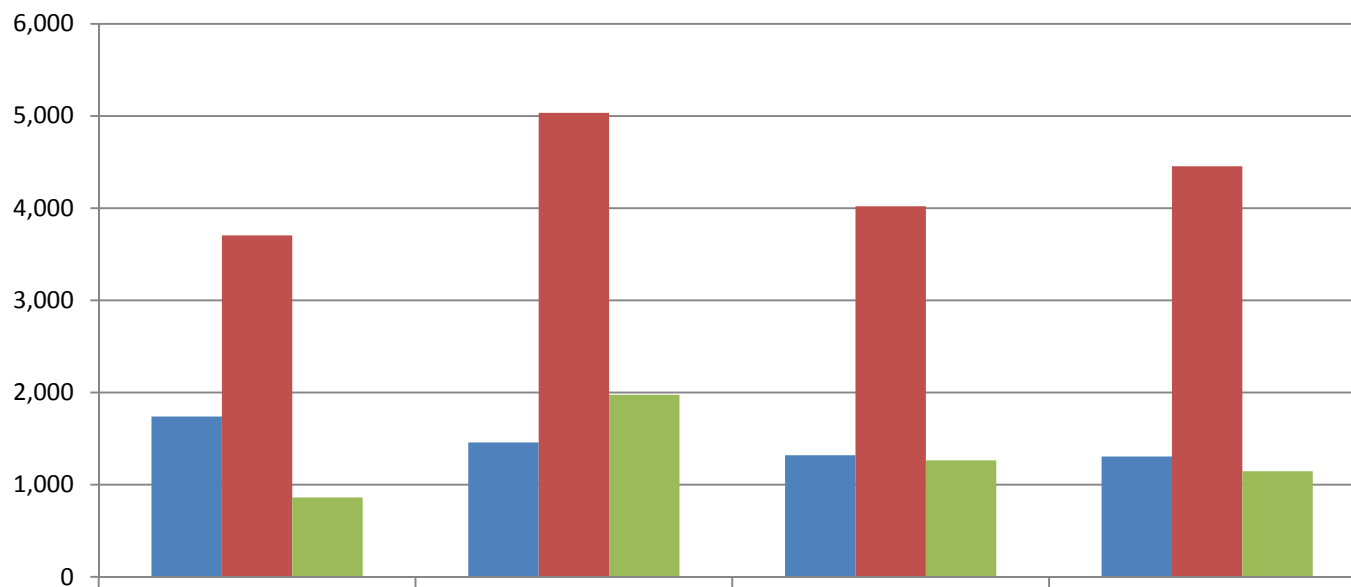


	2010-11	2011-12	2012-13	2013-14
Other Organizations*	\$519,448.69	\$449,618.65	\$435,447.50	\$1,083,871.93
Corporations	\$823,960.13	\$1,381,770.00	\$656,460.91	\$756,483.59
Foundations	\$206,723.00	\$104,840.00	\$228,650.00	\$109,200.00
Friends	\$1,144,419.90	\$1,272,826.63	\$698,580.24	\$1,594,448.99
Alumni	\$933,430.26	\$1,122,587.47	\$1,812,403.49	\$1,594,929.01
Total	\$3,627,981.98	\$4,331,642.75	\$3,831,542.14	\$5,138,933.52

*Other Organizations includes any constituent group not considered a corporation or foundation. Examples include, but are not limited to, registered student organizations, civic clubs, Confucius Institute, Chamber, state license plate proceeds, and Conway A&P. Corporate related foundations are included in Corporations.

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Donors & Membership FY11 - FY14

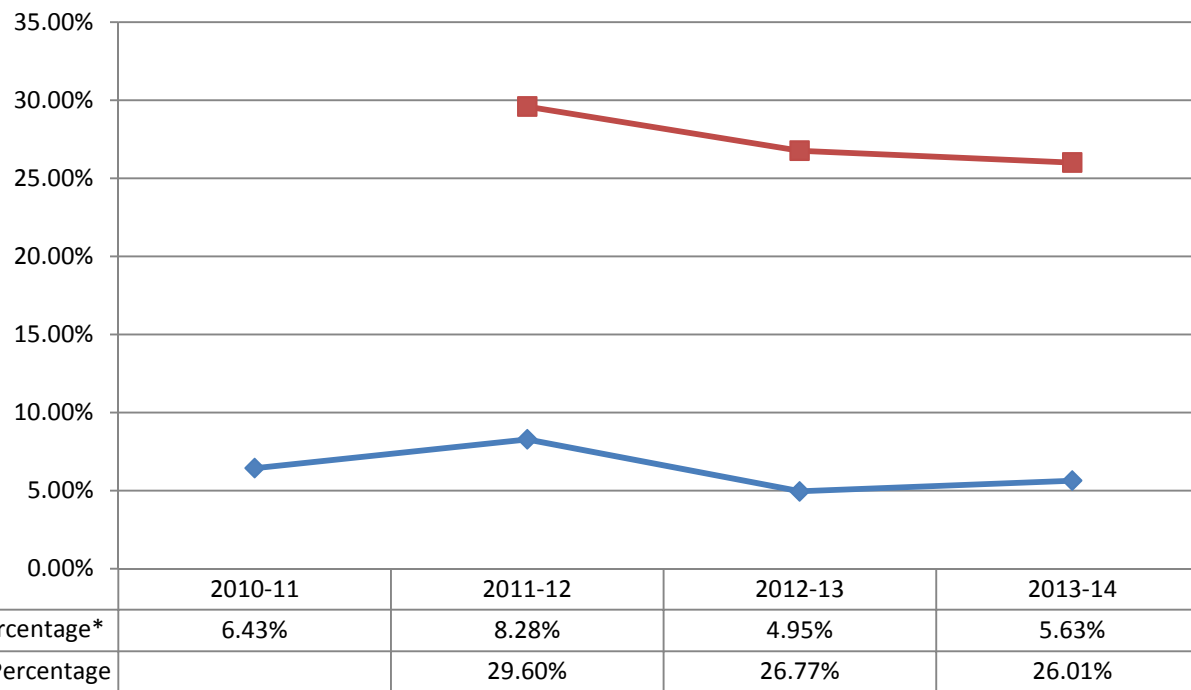


	2010-11	2011-12	2012-13	2013-14
Alumni Association Members	1,741	1,460	1,320	1,306
All Donors	3,705	5,034	4,020	4,455
New Donors	863	1,977	1,263	1,146

NOTE: In FY12, we opened up the Legacy Brick program to all alumni instead of recent graduates only. This resulted in a marked increase in Alumni Services total giving with 1,366 bricks sold many being first-time donors. Additionally, we did not hold a phonathon in spring 2013, and we were operating with one less major gift officer which affected donor numbers and giving percentages.

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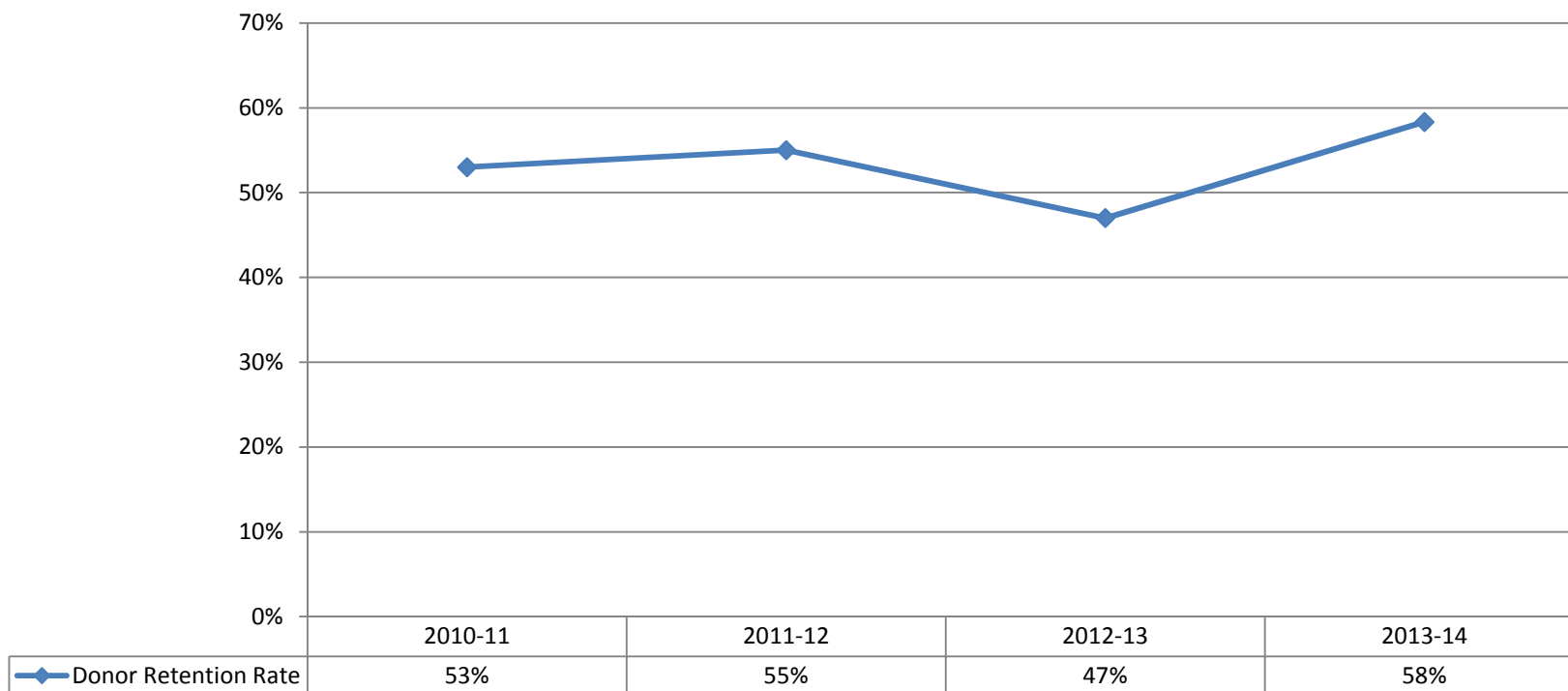
Participation by Alumni & Faculty/Staff FY11 - FY14



* US News counts undergraduate alumni donors compared to Alumni on Record, i.e. those alumni with valid contact information.
 NOTE: In 2011-12, we opened up the Legacy Brick program to all alumni instead of recent graduates only. This resulted in a marked increase in Alumni Services total giving with 1,366 bricks sold many being first-time donors. As a point of reference, in FY10 we sold 66 bricks. Additionally, we did not hold a phonathon in spring 2013, and we were operating with one less major gift officer which affected donor numbers and alumni giving percentages.

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Donor Retention Rate FY11 - FY14



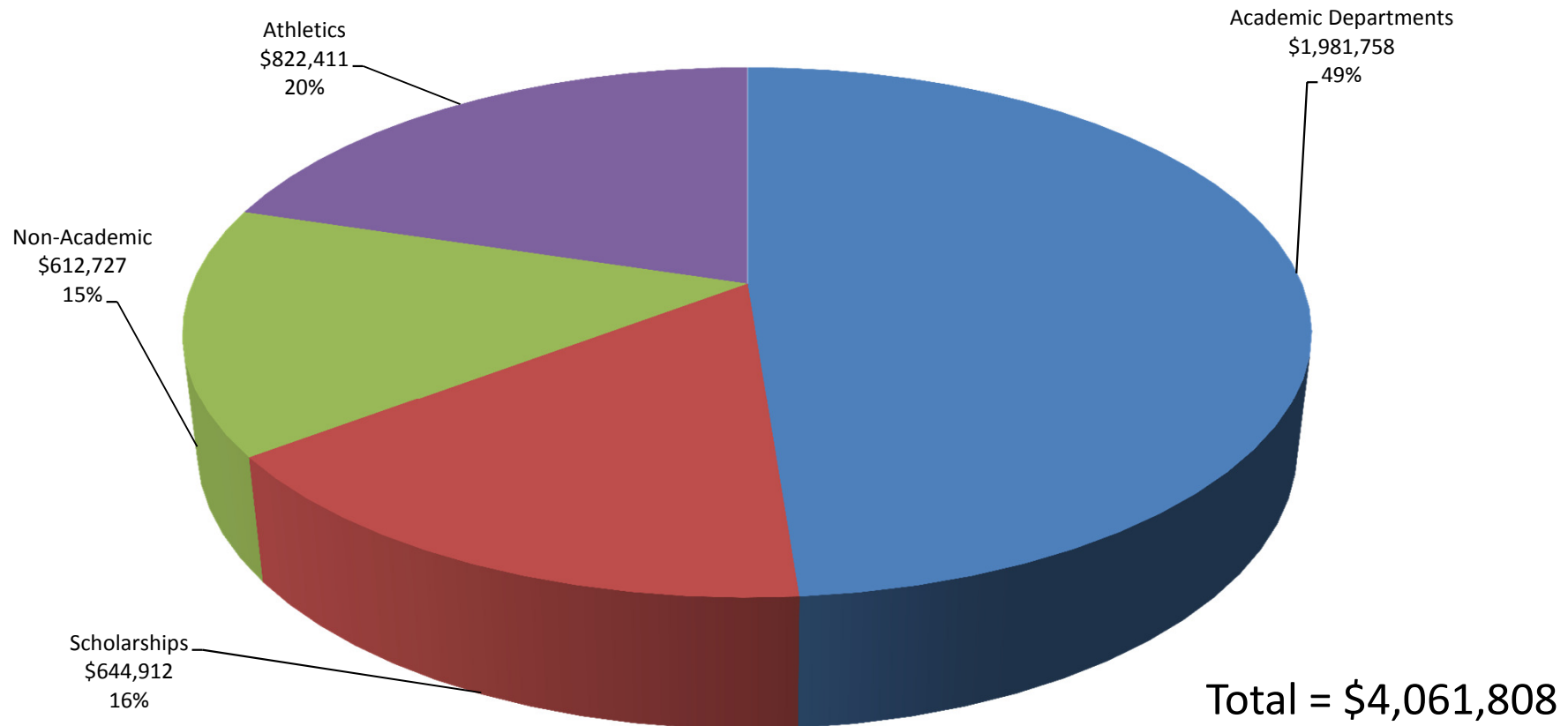
NOTE: In 2011-12, we opened up the Legacy Brick program to all alumni instead of recent graduates only. This resulted in a marked increase in Alumni Services total giving with 1,366 bricks sold many being first-time donors. Additionally, we did not hold a phonathon in spring 2013, and we were operating with one less major gift officer which affected donor numbers and giving percentages.

Impact Slides

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Annual Impact of the UCA Foundation

Amount Given to or Paid on Behalf of UCA by the UCA Foundation in FY14



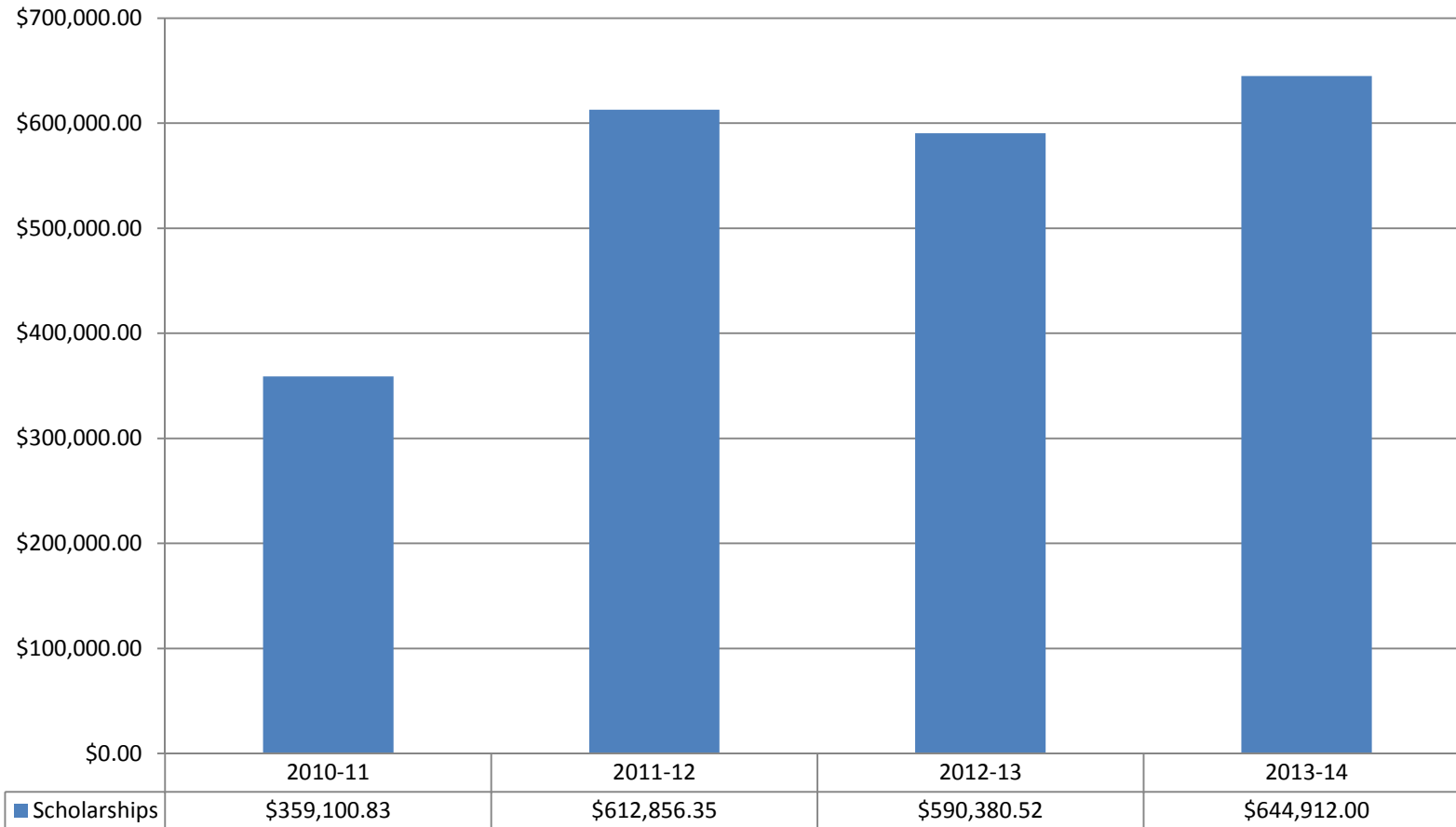
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UCA Foundation Scholarships Awarded FY11 - FY14



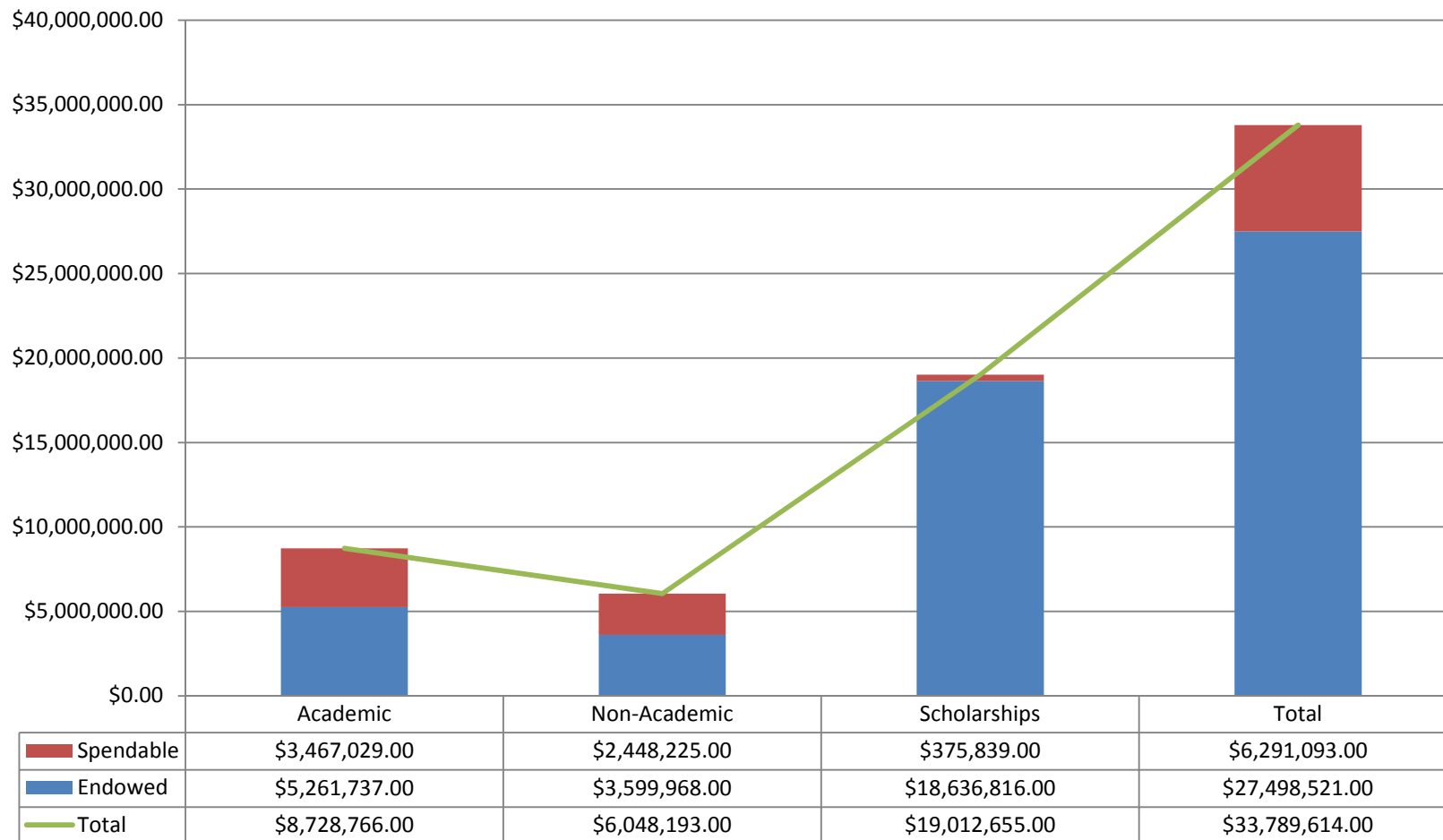
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UCA Foundation Ending Fund Balances as of June 30, 2014



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Foundation Financials

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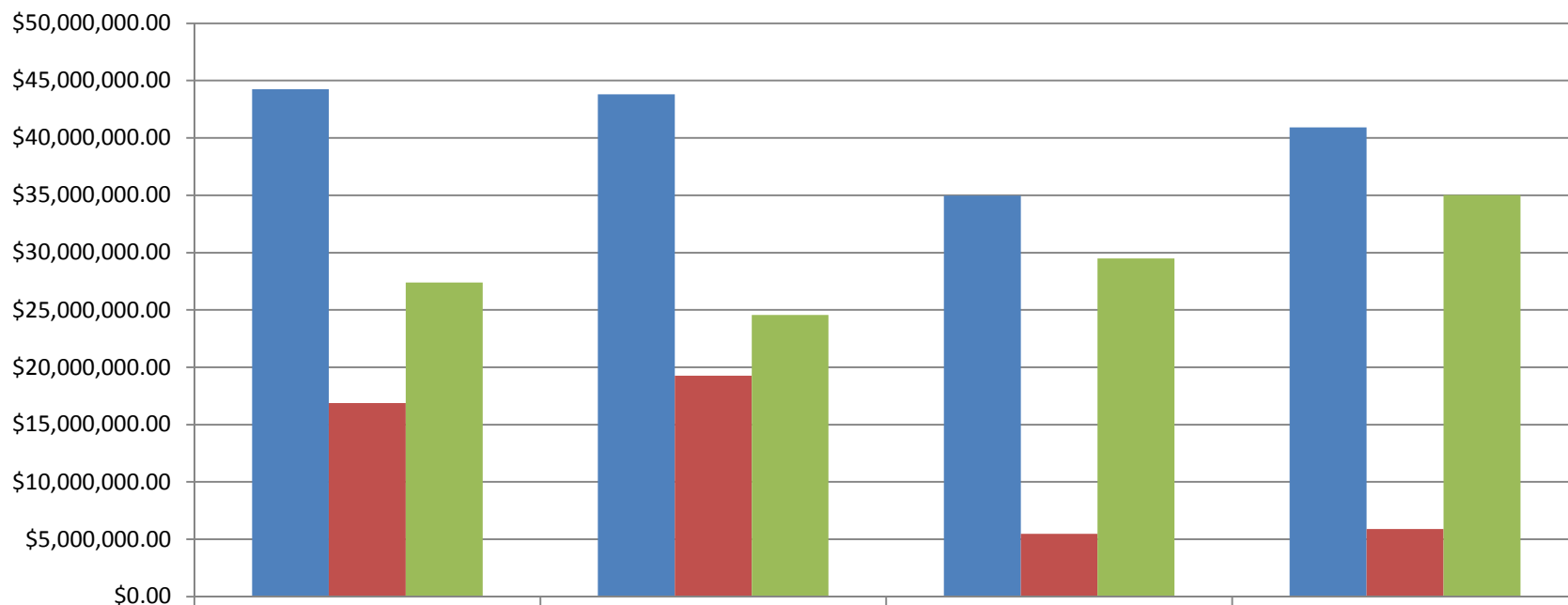
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UCA Foundation Assets & Liabilities

FY11 - FY14

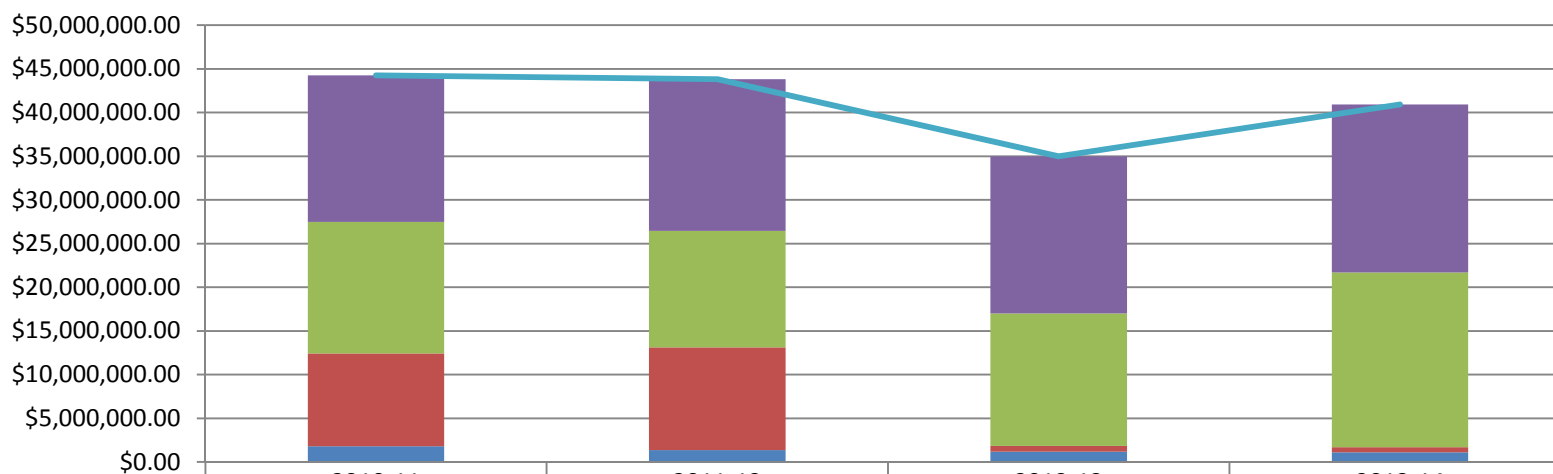


	2010-11	2011-12	2012-13	2013-14
Total Assets	\$44,251,992.00	\$43,815,379.00	\$34,975,035.00	\$40,912,635.00
Total Liabilities	\$16,865,666.00	\$19,263,248.00	\$5,483,907.00	\$5,884,716.00
Total Net Assets	\$27,386,326.00	\$24,552,131.00	\$29,491,128.00	\$35,027,919.00

NOTE: There was a significant change in Total Liabilities & Net Assets from FY12 to FY13 due to UCA's assumption of the debt for Bear Village, the skyboxes, and the weight training center. Crow/White funds are included in the liabilities category since it is owned by UCA.

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UCA Foundation Total Assets by Category FY11 - FY14

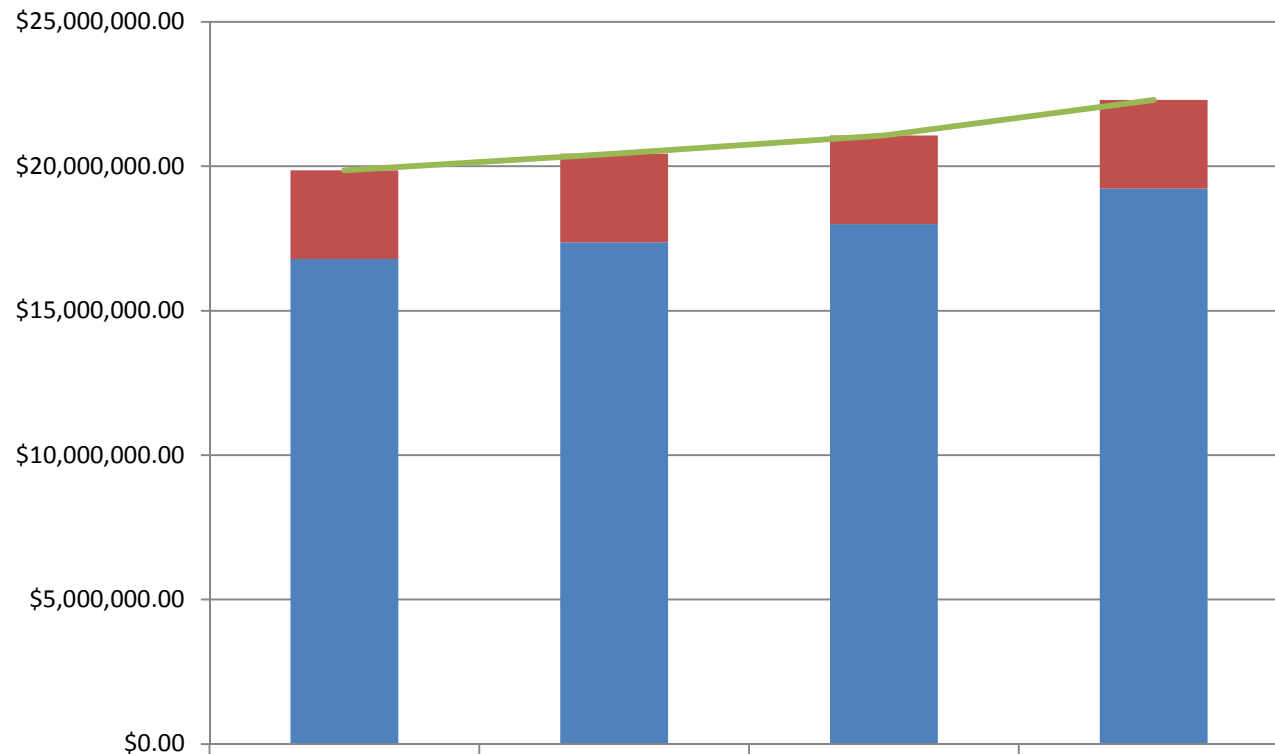


	2010-11	2011-12	2012-13	2013-14
Endowment Investments	\$16,788,104.00	\$17,364,801.00	\$17,992,931.00	\$19,224,460.00
Other Assets*	\$15,043,800.00	\$13,325,999.00	\$15,161,847.00	\$19,999,093.00
Property, Plant & Equipment	\$10,619,870.00	\$11,769,583.00	\$632,140.00	\$606,508.00
Current Assets	\$1,800,218.00	\$1,354,996.00	\$1,188,117.00	\$1,082,574.00
Total Assets	\$44,251,992.00	\$43,815,379.00	\$34,975,035.00	\$40,912,635.00

*Other Assets includes cash on bond funds, unconditional promises to give, investments, cash surrender value of Foundation owned life insurance, unamortized bond debt expense, prepaid insurance, and miscellaneous artwork. Much of these no longer appear on the Foundation books because UCA purchased Bear Village and paid off the bonds. There was a significant change in Property, Plant & Equipment from 2011-12 to 2012-13 due to UCA's assumption of the debt for Bear Village, the skyboxes, and the weight training center.

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UCA Foundation Endowment Levels FY11 - FY14



UCA Crow/White	\$3,072,029.54	\$3,072,029.54	\$3,072,029.54	\$3,072,029.54
UCA Foundation Endowment Investments	\$16,788,104.00	\$17,364,801.00	\$17,992,931.00	\$19,224,460.00
Total	\$19,860,133.54	\$20,436,830.54	\$21,064,960.54	\$22,296,489.54

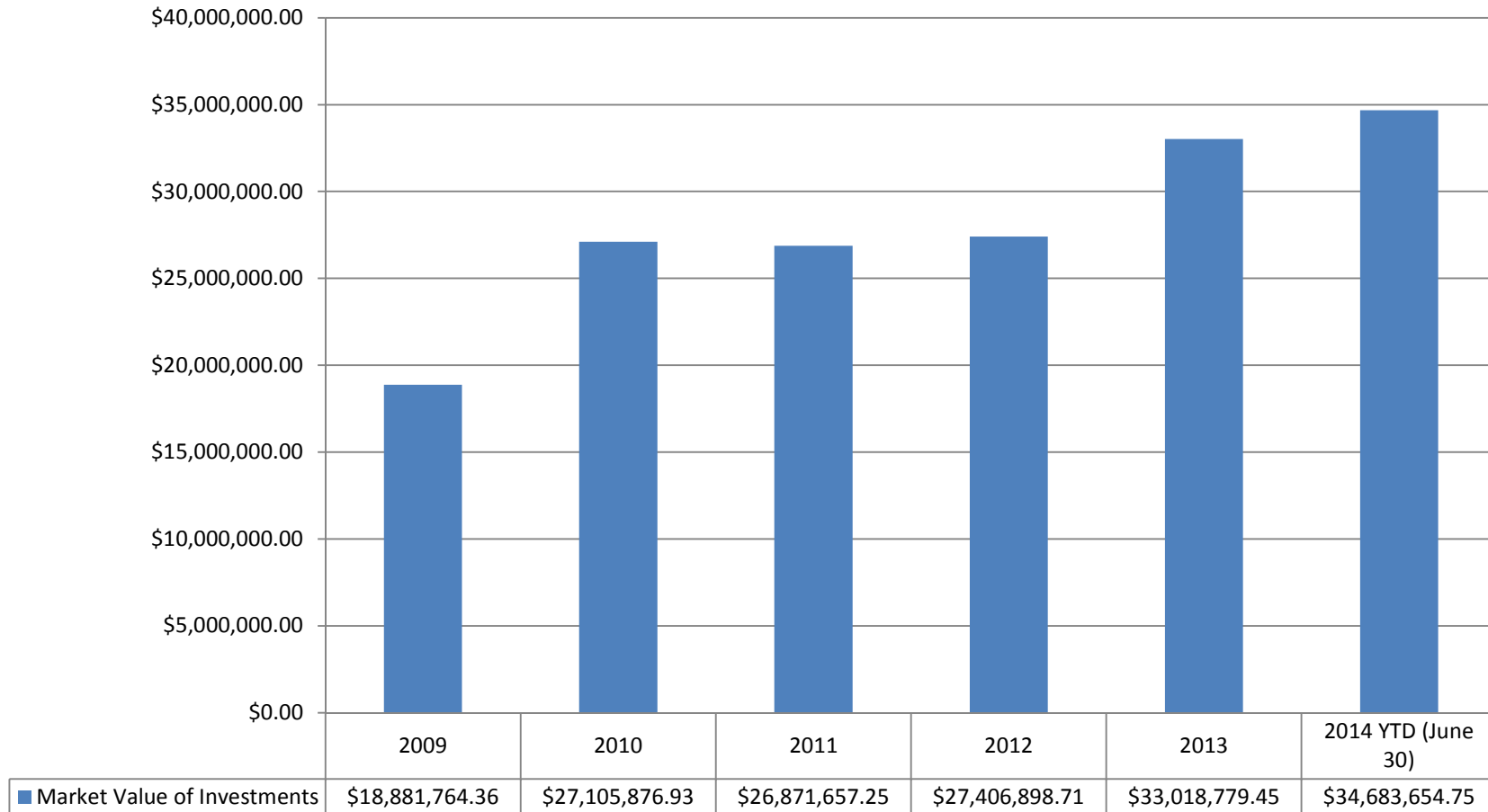
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UCA Foundation Market Value of Investments Calendar Year 2009 - 2014 YTD (Jun 30)



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