



Dear Leadership:
Here's Why Your Gift
Planning Program is
Important

Elizabeth Ayers, JD
Executive Director of UNC Gift Planning



Elizabeth Ayers, JD

Executive Director of Gift Planning
The University of North Carolina at Chapel Hill

- Prior to joining UNC in 2008, worked as Director of Planned Giving for the Medical Center at The Ohio State University and as Associate Director of Planned Giving for the University
- Former member of the Board of National Association of Charitable Gift Planners (NACGP) and served as NCPP 2017 Conference Chair
- Member of NACGP Leadership Institute and the North Carolina Planned Giving Council where she served on its Board from 2013 through 2016
- Presents on various charitable topics at local and national conferences across the country
- Practiced law in the areas of estate and charitable planning and civil litigation
- JD from Capital University, MM from Ohio University, and a BM from Wittenberg University



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Gift Planning Standard 2

*The nonprofit has a
strong internal business
case for gift planning
embraced by
management and Board*

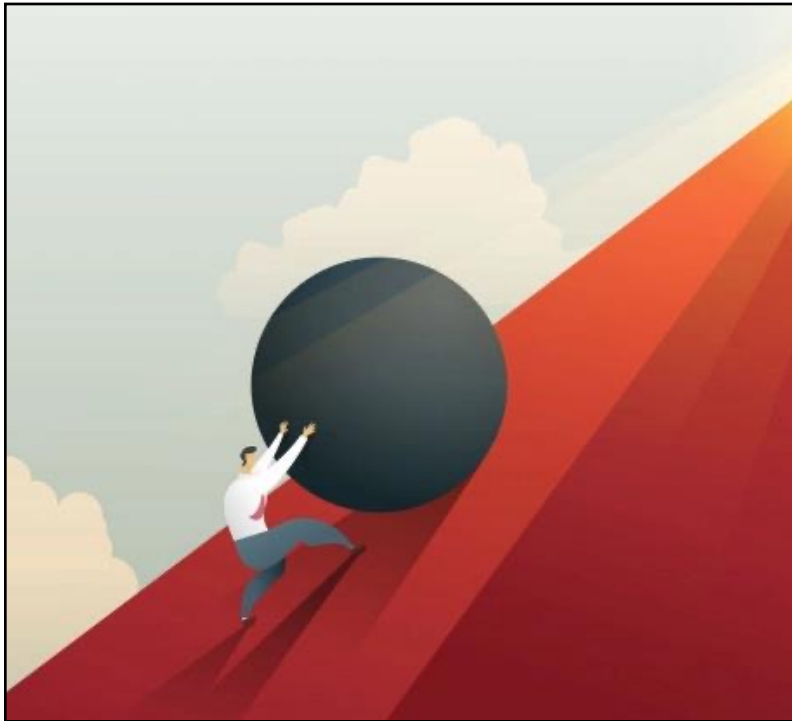
Goals for Today

1. Offer examples of resolving internal challenges while growing the gift planning program.

2. Provide Ideas for Collaboration with Internal Partners

3. Show data reports developed by my team to prove the value and breadth of the gift planning program.





Challenges


- ❖ Time
- ❖ Culture
- ❖ Collaboration
- ❖ Team
- ❖ Budget
- ❖ Mega-Campaign
- ❖ Communication
- ❖ Leadership
- ❖ Metrics
- ❖ Data



What could I build that I had control over?

Order and
simplification are the
first steps toward
mastery of a subject...

- Thomas Mann



Example 1

- Getting to Know New Communication Styles & Priorities of My Boss
- Program Budget (Lack Thereof)
- Internal Fiefdom Issues



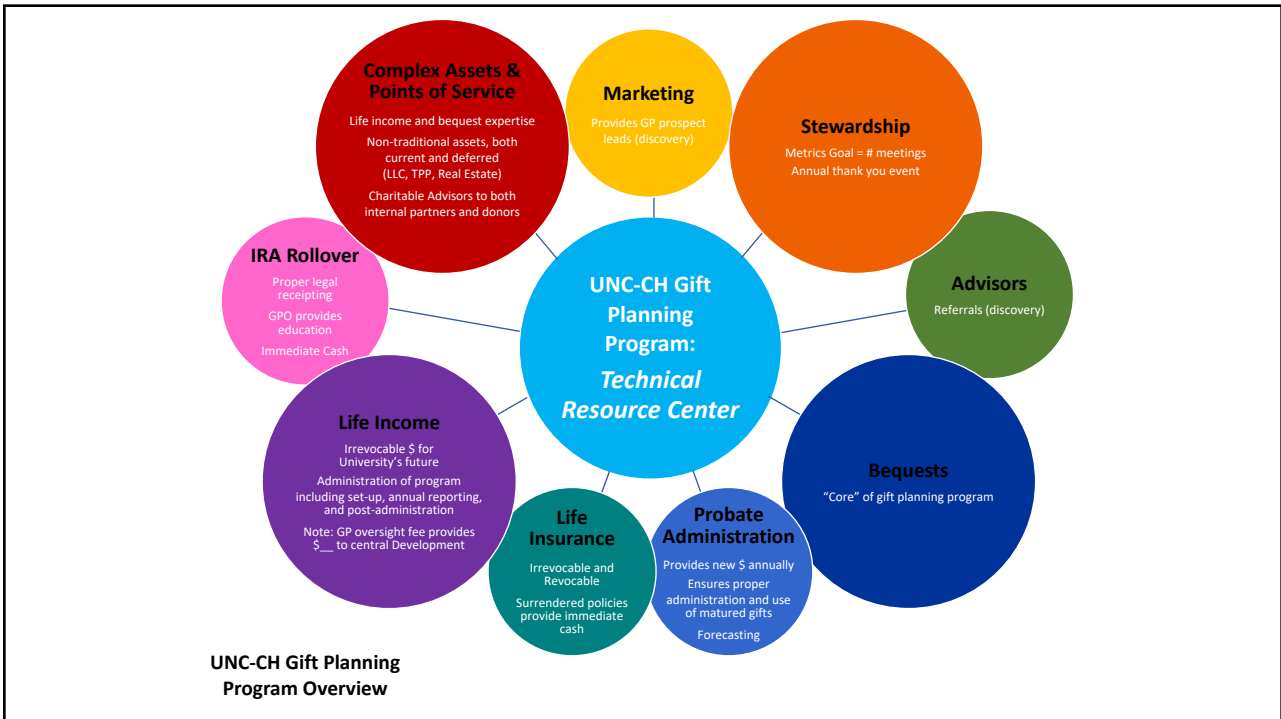
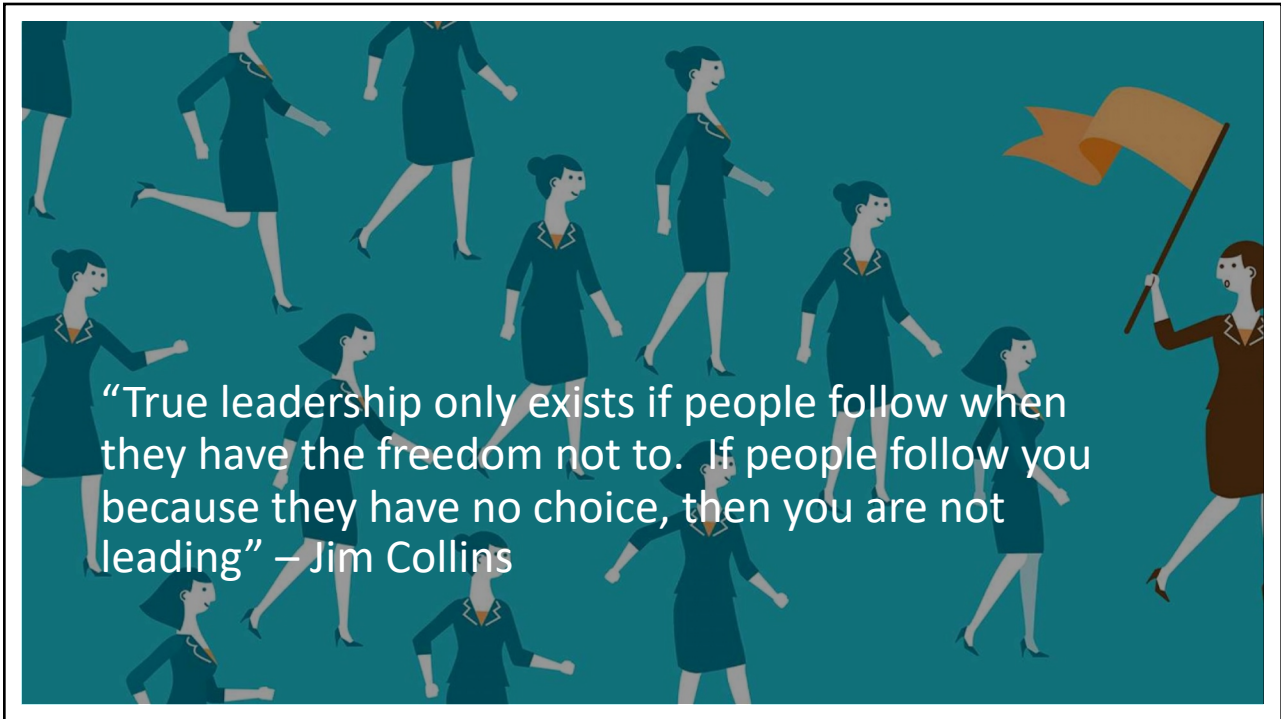


Example 2

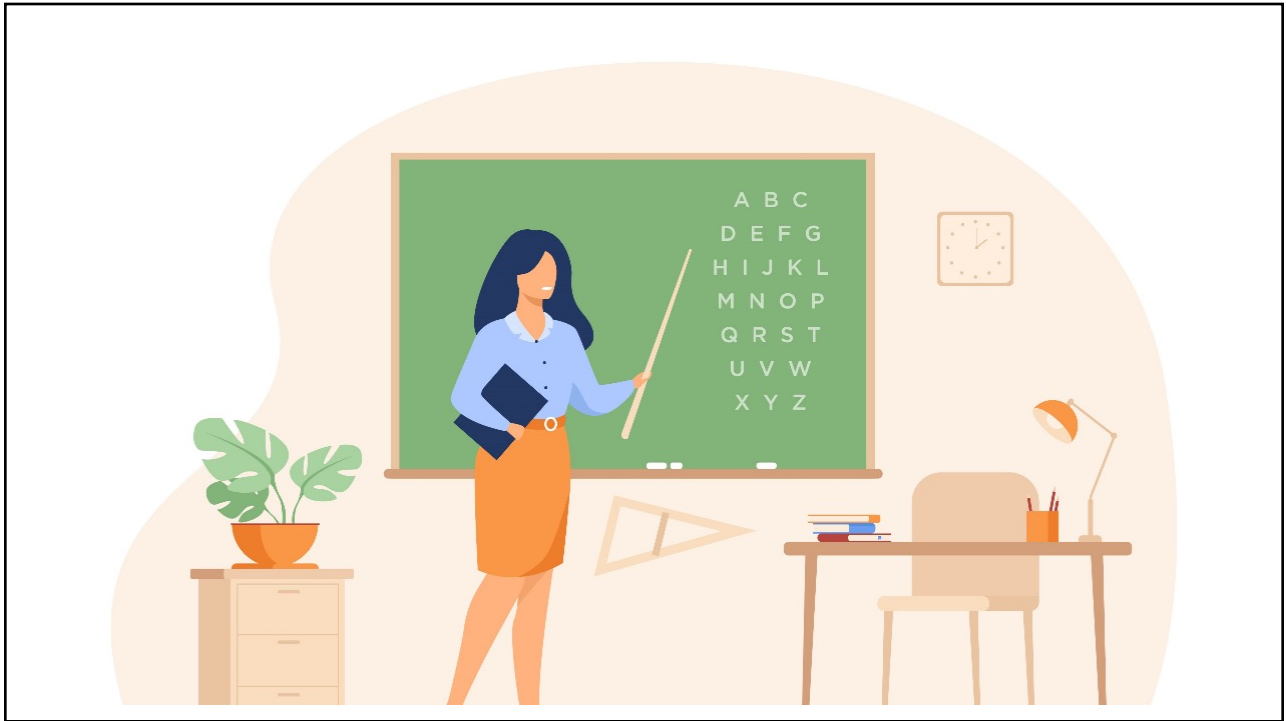
- Team Size and Makeup





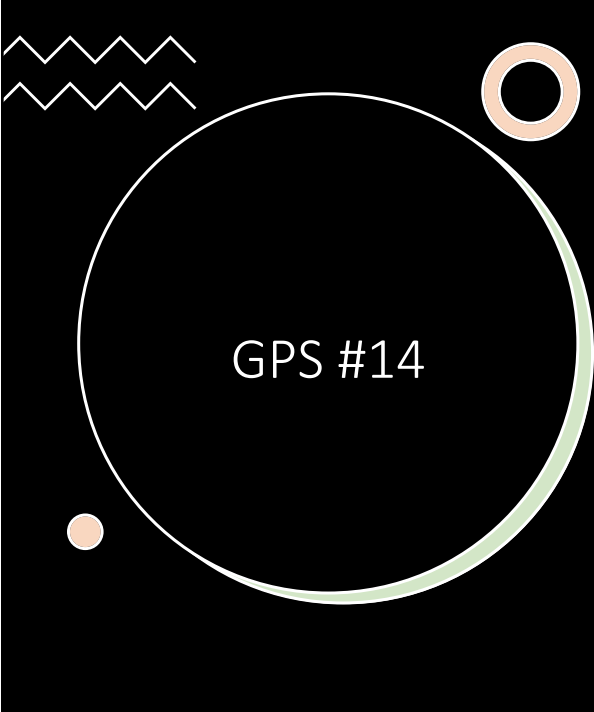









Can you hear me now?

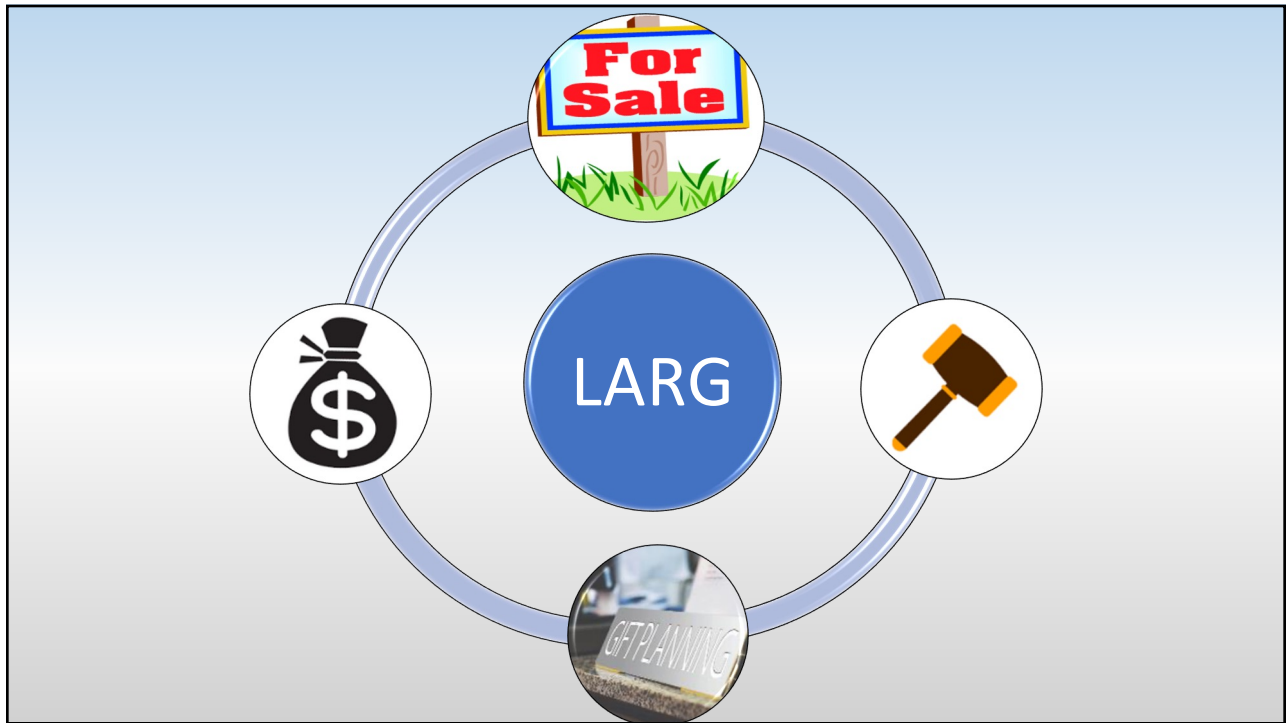


GPS #14

The nonprofit has a robust, well-executed stewardship plan across all lines of fundraising focused on engaging donors in a meaningful way, building long-term donor relationships and maintaining high donor retention rate

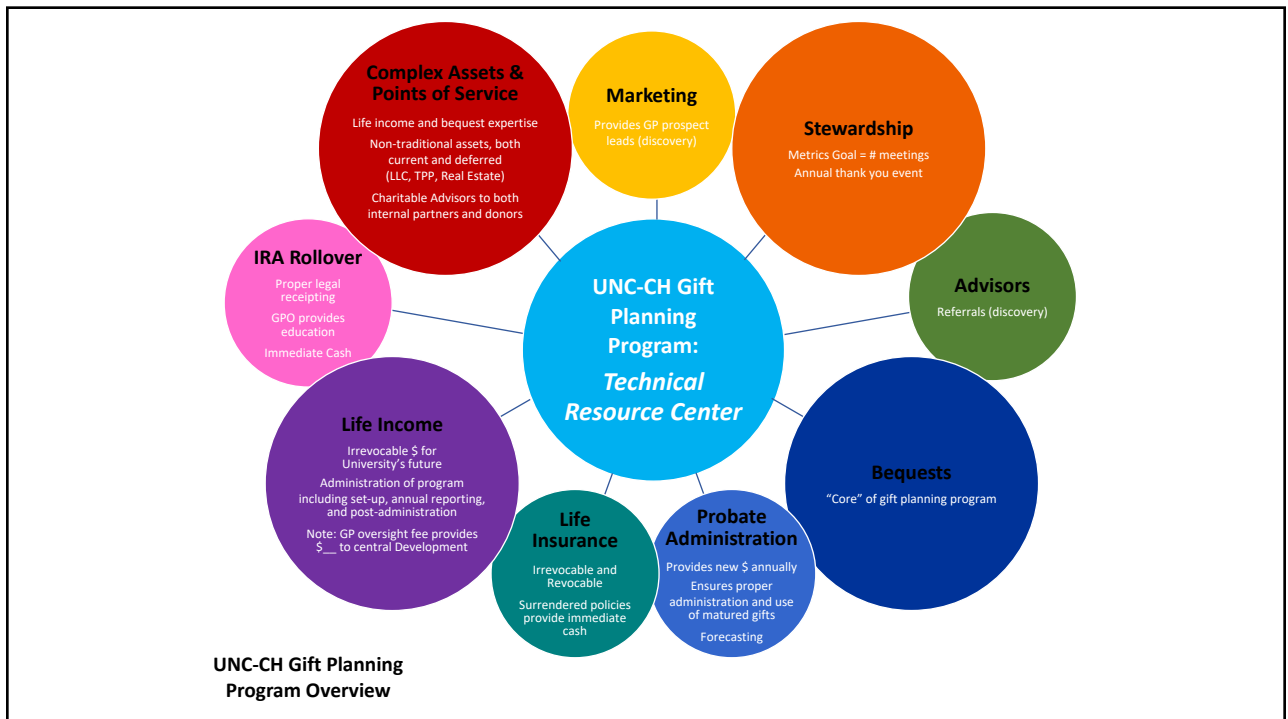


Legacy+ Program	
Fiscal Year	Revenue
FY 22	\$ 34,258,238.84
FY 21	\$ 22,695,850.85
FY 20	\$ 23,152,610.17
FY 19	\$ 18,990,468.81
FY 18	\$ 26,792,150.33
FY 17	\$ 5,580,702.56
FY 16	\$ 575,000.00
Total	\$ 132,045,021.56



Creating Impact Reports

- How does this help you build your program?
- Who is your audience?
- What do you want the data to show?



Gift Planning Leads

FY 2016						
GPO	Discovery	Advisors	Marketing	Stewardship	Development Officer	Total
Gift Planner #1	8	0	5	3	26	42
Gift Planner #2	16	0	5	0	22	43
Gift Planner #3	3	0	0	5	22	30
Total	27	0	10	8	70	115
	23%	0%	9%	7%	61%	
FY 2017						
GPO	Discovery	Advisors	Marketing	Stewardship	Development Officer	Total
Gift Planner #1	3	2	3	3	13	24
Gift Planner #2	1				1	2
Gift Planner #3	1				1	2
Total	5	2	3	3	15	28
	18%	7%	11%	11%	54%	
FY 2018						
GPO	Discovery	Advisors	Marketing	Stewardship	Development Officer	Total
Gift Planner #1	4	1	1	10	13	29
Gift Planner #2	1			3	14	18
Gift Planner #3	9		1	1	23	34
Gift Planner #4	2		1	2	11	16
Total	16	1	3	16	61	97
	16%	1%	3%	16%	63%	
FY 2019						
GPO	Discovery	Advisors	Marketing	Stewardship	Development Officer	Total
Gift Planner #1	4	1	4	16	36	61
Gift Planner #2	2	2	0	12	29	45
Gift Planner #3	0	0	0	0	5	5
Total	6	3	4	28	70	111
	5%	3%	4%	25%	63%	







UNC OFFICE OF GIFT PLANNING MID-CAMPAIGN REPORT

Elizabeth A. Ayers, JD
Executive Director of Gift Planning



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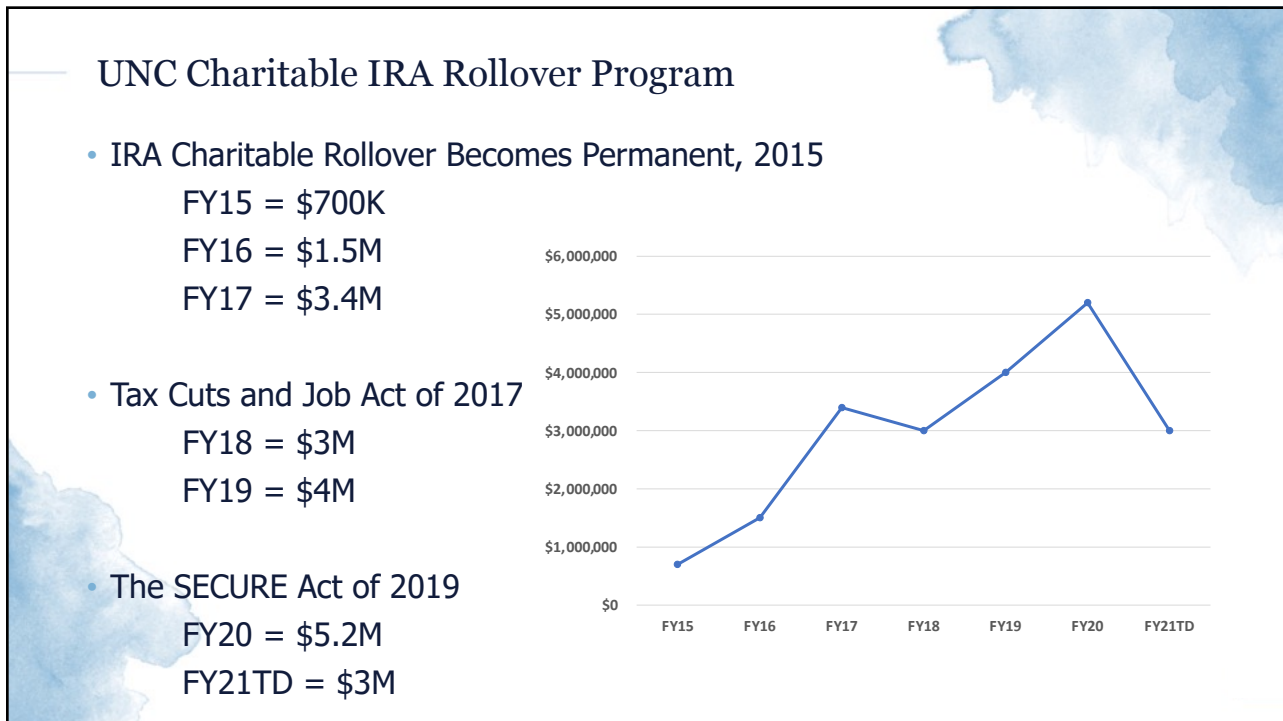
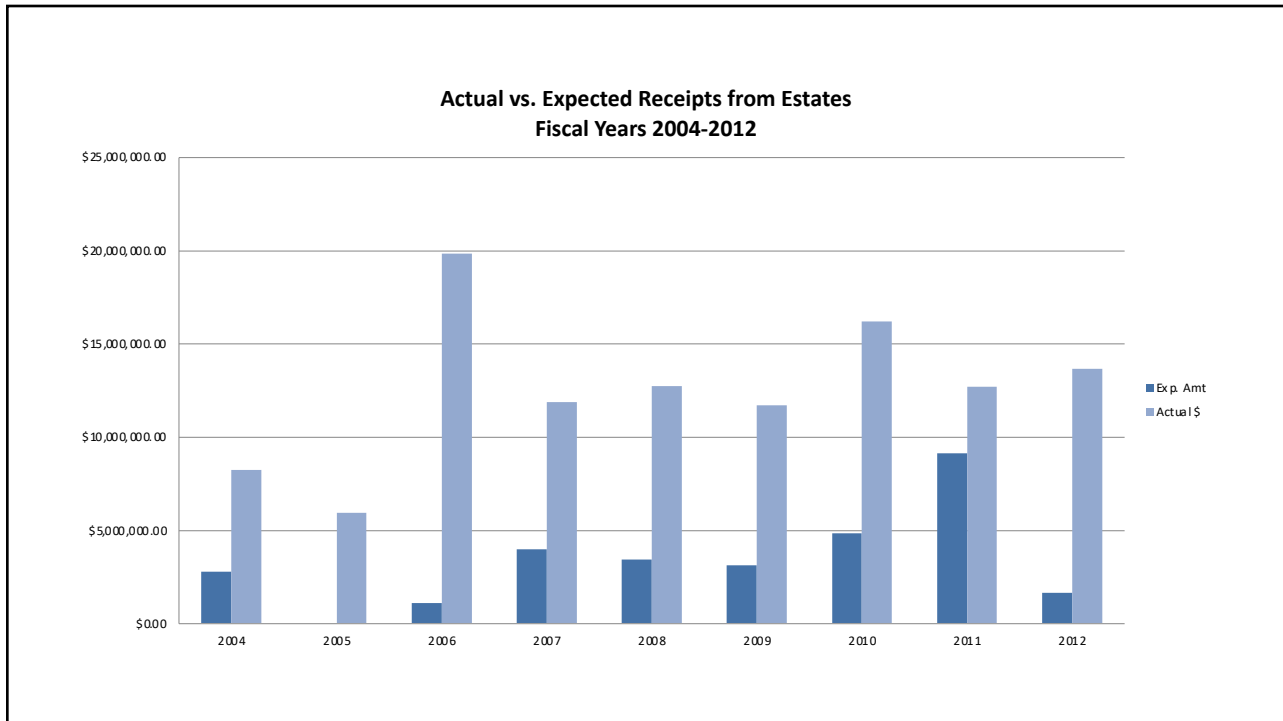
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2018 BUDGET AND STAFFING (continued)								
	 University of North Carolina at Chapel Hill	 University of Washington	 Texas A&M Foundation	 University of Florida	 The Ohio State University	 Penn State University	Peer Group Median	Peer Group Average
Budget (current fiscal year)								
Marketing and Promotion Budget for Gift Planning	\$16,813	\$42,436	\$109,849	\$124,842	\$109,000	\$65,000	\$85,000	\$77,323
Travel Budget for PG Fundraising FTEs	\$15,973	\$10,084	\$90,213	\$81,900	\$51,000	\$80,000	\$65,500	\$54,862
For All Other Gift Planning Budget Items	\$25,750	\$68,323	\$84,937	\$45,298	n/a	\$45,000	\$45,298	\$53,862
2018 PEER MEASURES - DEFERRED								
Life Income								
Avg Size Realized Requests in FY	\$261,341	\$269,231	\$274,889	\$288,113	\$164,571	\$191,866	\$261,341	\$236,156
Number of New Life Income Gifts/PG Fundraiser FTE	4.7	2.3	1.7	3.0	2.4	6	32.7	3.3
Percent of Repeat Life Income Donors Number of Gifts	67%	47%	47%	52%	44%	83%	50%	57%
Number of Repeat Life Income Donors Trusts	16	6	8	5	n/a	19	8	11
Number of Repeat Life Income Donors CGA	55	10.7	15.2	30.5	30.6	47.8	30.5	31.6
Number of CGAs New - Total	10	9	4	12	15	20	11	12
Value of CGAs New - Total	\$413,795	\$643,402	\$370,606	\$642,402	\$2,451,418	\$1,648,860	\$643,104	\$1,008,397
Bequests								
Number New Bequest Expectancy per PG FTE	2	2	1	5	8	14	4	6
Number of Newly Identified Bequest Expectancies	165	64	91	183	214	191	174	151
Value of Newly Identified Bequest Expectancies	\$152,978,397	\$40,924,240	\$114,792,380	\$85,266,785	\$151,934,222	\$74,251,125	\$100,029,083	\$103,441,025

Deferred Only for Campaign Counting

25% of Campaign Goal





For All Kind Gift Planning Campaign Snapshot

Fiscal Year	Revocable Gifts Total	Non-Countable Revocable*	Irrevocable Gifts Total	Overall Campaign Totals	Gerrard Society New Members
Grandfathered	\$ 49,168,826.00		\$ 5,255,627.08	54,424,453.08	
FY 2015	\$ 97,142,496.74	\$ (50,000.00)	\$ 4,361,342.81	101,453,839.55	82
FY 2016	\$ 158,144,334.00	\$ (1,429,575.00)	\$ 6,880,748.00	163,595,507.00	158
FY 2017	\$ 134,641,460.24	\$ (100,000.00)	\$ 4,750,115.72	139,291,575.96	158
FY 2018	\$ 160,314,799.00	\$ (250,000.00)	\$ 30,503,790.00	190,568,588.00	138
FY 2019	\$ 128,832,946.05	\$ (300,000.00)	\$ 2,311,719.47	130,844,665.52	145
FY 2020	\$ 104,333,829.98	\$ (700,000.00)	\$ 2,127,867.00	105,761,696.98	107
FY 2021	\$ 67,171,303.57	\$ (5,025,000.00)	\$ 3,674,291.81	65,820,595.38	81
FY 2022	\$ 221,546,589.00	\$ (10,222,000.00)	\$ 3,459,086.83	214,783,675.83	116
FY 2023**					
Campaign Totals	\$ 1,121,296,584.58	\$ (18,076,576.00)	\$ 63,324,588.72	\$ 1,166,544,597.30	985
C. Whitted #s (6/1/22)	\$ 1,123,454,975		\$ 61,236,469	\$ 1,184,691,438.00	
Difference (Ed Fdn)	\$ 2,158,390.42	\$ 18,076,576.00	\$ (2,088,125.72)	\$ 18,146,840.70	
Initial Gift Planning Goal				\$ 1,062,500,000.00	110%
Remaining to Initial Goal				\$ (104,044,597.30)	-10%
Updated Gift Planning Goal				\$ 1,162,500,000.00	100%
Remaining to Initial Goal				\$ (22,191,438.00)	-2%



* not 50 by 12/31/2022 (1973 and later)
** End date is 12/31/2022

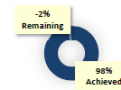
Gift Planning Inventory

Type of Gift	Gift Total	Number of Gifts
Revocable Gifts	\$1,497,191,648.67	2,449
Irrevocable Gifts	\$162,131,950.67	769
Inventory Totals:	\$1,659,323,599.34	3,218

Legacy+ Program

Fiscal Year	Revenue
FY 22	\$ 34,258,238.84
FY 21	\$ 22,695,850.85
FY 20	\$ 23,152,610.17
FY 19	\$ 18,990,468.81
FY 18	\$ 26,792,150.33
FY 17	\$ 5,580,702.56
FY 16	\$ 575,000.00
Total	\$ 132,045,021.56

GP Percent to Goal



FY 2022 Gift Planning Officer Totals

Cash/Pledges Totals	IRA/QCD Totals	Number of Cash Gifts	Number of IRA QCD Gifts	Total Deferred Revenue	Gift Planning Officer Total
\$13,836,778.58	\$ 6,947,578.24	176	1674	\$157,463,357.32	\$178,247,714.14

*Does not reflect cash/stock gifts to Rams Club as values are not reflected in Davie by donor

Gerrard Society
Total Members in Gerrard Society
1967

History of UNC Gift Planning by Fiscal Year


Fiscal Year	Revocable Planned Gifts Total	Irrevocable Planned Gift Total	Probate Receipts Total	IRA Rollover Total	Cash/Pledges Total	Real Estate Total	Gift in Kind/Other Total	Grand Total
FY 2011	\$ 30,330,454.00	\$ 7,310,541.91	\$ 12,695,553.65	\$ 460,570.08				\$ 50,797,119.64
Gerrard Society 11								44
FY 2012	\$ 46,334,717.00	\$ 7,719,052.00	\$ 13,685,176.20	\$ 702,904.21				\$ 68,441,849.41
Gerrard Society 12								74
FY 2013	\$ 27,236,030.00	\$ 374,965.00	\$ 6,021,440.23	\$ 739,921.90			\$ 525,405.00	\$ 34,897,762.13
Gerrard Society 13								64
FY 2014	\$ 32,447,508.84	\$ 4,072,774.65	\$ 11,762,148.00	\$ 1,289,406.51			\$ 1,034,862.05	\$ 50,606,700.05
Gerrard Society 14								61
FY 2015	\$ 97,142,496.74	\$ 4,361,342.81	\$ 2,511,545.17	\$ 826,344.32			\$ 5,043,987.00	\$ 109,885,716.04
Gerrard Society 15								82
FY 2016	\$ 158,144,334.00	\$ 6,880,748.00	\$ 9,537,251.07	\$ 1,724,868.17	\$ 5,569,912.11	\$ 5,931,250.00		\$ 187,788,363.35
Gerrard Society 16								158
FY 2017	\$ 134,641,460.24	\$ 4,750,115.72	\$ 4,809,312.43	\$ 2,183,819.46	\$ 13,102,899.94	\$ 1,100,000.00	\$ 19,653,202.83	\$ 180,240,810.62
Gerrard Society 17								158
FY 2018	\$ 160,314,799.00	\$ 30,503,790.00	\$ 12,285,509.64	\$ 2,608,938.14	\$ 5,400,454.54	\$ 2,610,000.00	\$ 1,061,392.21	\$ 214,784,883.53
Gerrard Society 18								138
FY 2019	\$ 128,832,946.05	\$ 2,311,719.47	\$ 9,964,968.63	\$ 3,714,763.04	\$ 22,726,821.11	\$ 85,000.00	\$ 79,523.56	\$ 167,715,741.86
Gerrard Society 19								145
Total # Gifts 19	141	21	53	465	243	1	18	942
FY 2020	\$ 104,333,829.98	\$ 2,127,867.00	\$ 14,035,278.50	\$ 5,238,930.38	\$ 9,842,819.58	\$ 5,350,000.00	\$ 6,343,348.31	\$ 147,272,073.75
Gerrard Society 20								107
Total # Gifts 20	137	23	57	746	209	1	45	1218
FY 2021	\$ 67,171,303.57	\$ 3,674,291.81	\$ 7,707,141.24	\$ 55,316,589.15	\$ 9,842,819.58	\$ 1,294,944.78	\$ 992,521.45	\$147,272,073.75
Gerrard Society 21								80
Total # Gifts 21	121	22	43	1123	145	1	20	1475
FY 2022	\$221,546,589.00	\$3,459,086.83	\$6,564,795.67	\$6,947,578.24	\$13,836,778.58	\$ 575,000.00	\$7,323,628.94	\$260,253,457.26
Gerrard Society 22								49
Total # Gifts 22	140	28	58	1674	176	1	77	2154

Total Revocable and Irrevocable Campaign Commitments

Fiscal Year	Revocable and Irrevocable Revenue
FY 22	\$ 225,005,675.83
FY 21	\$ 70,845,595.38
FY 20	\$ 105,761,696.98
FY 19	\$ 130,844,665.52
FY 18	\$ 190,568,588.00
FY 17	\$ 139,291,575.96
FY 16	\$ 163,595,507.00
FY 15	\$ 101,453,839.55
Grandfathered	\$ 54,424,453.08
Total	\$ 1,181,791,597.30

the CAMPAIGN for CAROLINA

Affiliated Entities



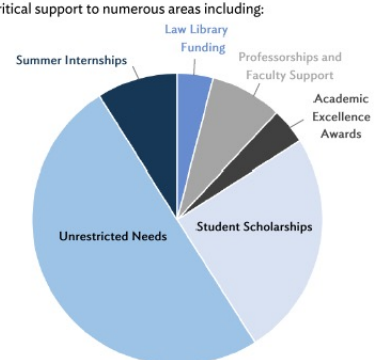
Carolina Law Legacies
THE IMPACT OF DEFERRED GIVING

FOR ALL KIND

The Everett Society honors Kathrine R. Everett's legacy and the legacy of all who have made a documented deferred commitment to Carolina Law.

Planned gifts, such as revocable estate commitments and irrevocable life income gifts, secure Carolina Law's legacy. They also help you plan for your family's financial future, and your charitable legacy can provide significant tax advantages. When you document your deferred gift, UNC School of Law is also better able to plan for its future.

Since the launch of For All Kind: The Campaign for Carolina, realized deferred gifts from 12 generous donors have provided over **\$2 Million** in support to Carolina Law. This funding has provided critical support to numerous areas including:



Category	Relative Size
Unrestricted Needs	Largest
Student Scholarships	Second Largest
Summer Internships	Third Largest
Law Library Funding	Small
Professorships and Faculty Support	Small
Academic Excellence Awards	Smallest

the CAMPAIGN for CAROLINA
UNC
 SCHOOL OF LAW

Where are we now? – August 2022

- Gift Planning has surpassed its campaign goal of \$1,162,500,000.00
- Gift Planners are enjoying strong partnerships with major gift officers
- Leadership respects the Gift Planning Program





Step-by-step building
through challenges



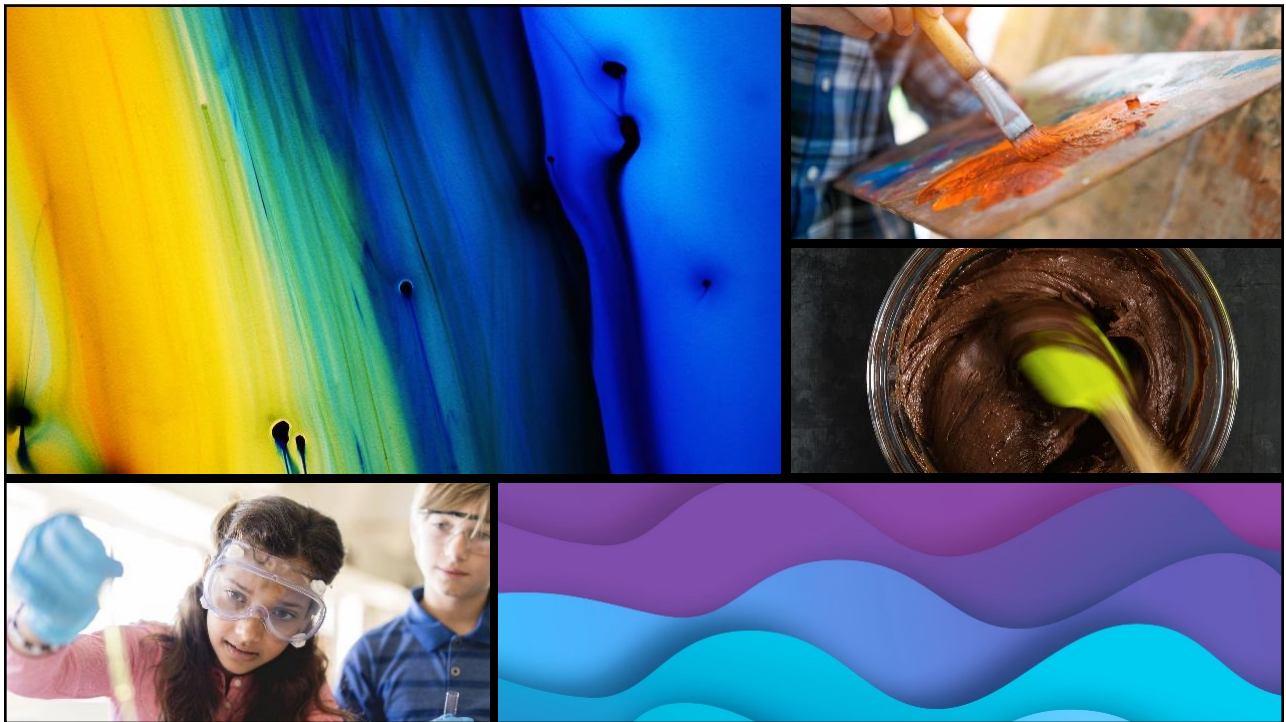
Building internal
collaboration



Proof to your leadership
for necessity of your gift
planning program



Data



“We delight in the beauty of the butterfly, but rarely admit the changes it has gone through to achieve that beauty”

-Maya Angelou



Q&A

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Executive Director of Gift Planning

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ADDITIONAL QUESTIONS

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WEBINAR RESOURCES

- Recording
 - Presentation handouts
- www.stelter.com/webinars



Thanks!

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