Undergraduate Awards and Bursaries Committee Orientation

Office of Advancement

November 5, 2019
● Why are student awards important?
● What is the role of the Office of Advancement?
● How do donors contribute?
● Why are donors important?
● How can the UABC help?
Why are student awards important?

- University is a significant investment.
- Financial barriers can prevent promising students from attending university or cause them to drop out.
- Awards lower barriers and encourage excellence.
- In 2018/19, 38% of funding for Office of the Registrar administered undergraduate awards came from donors.
What is the role of the Office of Advancement?

- Build relationships with donors and potential donors.
- Help donors understand how gifts to the U of A can make a difference in a cause that matters to them.
- Inform donors about the impact of their gift.
- Be accountable and transparent to the donor.
In partnership with SFS, we help establish terms of reference for awards that meet guidelines, ensures the wishes of donors are met, and are not so restrictive that they are difficult to award.

Ensures awards comply with:
- Income Tax Act
- Canada Revenue Agency guidelines
- Wills and Succession Act (Alberta)
- University of Alberta policies and procedures (Donation Acceptance Policy)

Sets up endowments, reports to donors and administration, manages requests to vary terms.
Fundraising Achievement (FRA)
- Combination of outright gifts, new pledges, planned (deferred) gifts, grants and sponsorships
- Pledges are gifts made over a defined period of time (usually five years)

Funds Received (FR) or Cash
- Actual amount received within the fiscal year
- Outright gifts, matching gifts or payments for pledges, grants, sponsorships and realized planned gifts
Endowed Award

- Donor contributions are invested by the U of A
- Award is funded in perpetuity using the annual investment earnings

Annually Funded Award

- Award payments are provided by the donor on a yearly basis for a minimum of five years
How do donors contribute to the university?

- Research: $60.6M (53.6%)
- Student Awards: $26.3M (23.3%)
- Chairs/Prof’ships: $12.0M (10.6%)
- Programs: $11.9M (10.5%)
- Facilities: $0.7M (2.1%)

Notes: Breakdown of Cash by Purpose FY2018/19 (does not include gifts in kind)
Student awards include graduate and undergraduate
Breakdown for student awards

Notes: Breakdown of Cash for FY2018/19
Totals include graduate and undergraduate awards
<table>
<thead>
<tr>
<th>Fiscal year</th>
<th>Endowed</th>
<th>Annually Funded</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017-18</td>
<td>$5.53M</td>
<td>$2.81M</td>
<td>$8.34M</td>
</tr>
<tr>
<td>2018-19</td>
<td>$11.02M</td>
<td>$3.35M</td>
<td>$14.37M</td>
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</tbody>
</table>

*Data reported is based on cash received for Undergraduate Financial Support in fiscal years 2018 and 2019.*
Donors are our advocates. They believe in and want to support the work of the university.

They are partners in research, outreach and student support. Their support can transform lives and lead to breakthroughs.

We can generally be more flexible with how donor gifts are used, versus funds from government or industry.

Their gifts for an award may be made annually or into an endowment, which funds an award in perpetuity.
● Timely approval of a donor-funded award helps ensure a positive, long-term relationship with the donor that benefits the U of A.

● Carefully consider wording changes — to ensure donor wishes are honoured.

● Identify any trends, gaps or concerns in terms of support for undergraduate students.
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“uplifting the whole people”
— HENRY MARSHALL TORY, FOUNDING PRESIDENT, 1908