

# UH FOUNDATION

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## Year Established

The UH Foundation was established in 1955 to encourage private support for the University of Hawai'i. Today it is the central fundraising organization for the UH System. It provides a range of professional fundraising services to all 10 UH campuses.

## Mission Statement

Our mission is to unite our donors' passions with the University of Hawai'i's aspirations to benefit the people of Hawai'i and beyond.

We do this by raising private philanthropic support, managing private investments and nurturing donor and alumni relationships to support the UH System.

## Our Goals

- Raise funds for merit and need-based student aid and scholarships to help students fulfill their academic potential.
- Fuel research and innovation through strategic philanthropic investments.
- Partner in impactful capital improvement projects and initiatives to bring cutting-edge technology and equipment to campuses statewide.

## The Endowment for UH

For the fiscal year ending June 30, 2011, the endowment for UH produced an 18.6% return.

Thanks to more than \$15 million in new gifts coupled with the endowment's strong performance, the overall endowment grew to \$207.3 million.

## Service Area

- Raise funds and nurture alumni relationships for all 10 UH System campuses.
- Strengthen relationships with partners who have affinity with UH worldwide.
- Generate global impact with donors' investments. Funding UH research contributes to solving healthcare, environmental and social problems. Scholarship support helps UH graduates enter an international workforce.
- A strong public university contributes to Hawai'i's leadership role in the Asia Pacific region.

## About Us

The UH Foundation is contracted by the Board of Regents to be the sole provider of fundraising and alumni services. The Foundation works closely with university leaders, but is an independent, non-profit foundation that is legally separate from the UH System and the State of Hawai'i.

The Foundation has a number of specialists on staff to provide comprehensive fundraising services. Expertise areas include major gifts, corporate and foundation giving, annual giving, and tax and charitable estate and gift planning.

The Foundation partners with academic leaders to identify strategic priorities and match them with prospective donors.

- **99% of gifts raised are donor-directed. This means that donors decide how and where their gifts are used.**
- **To ensure expenditures are consistent with donors' intent, more than 5,000 accounts have been established to fulfill this expectation.**

## Ways to Give

- An **Outright Gift** is one that immediately benefits the University of Hawai'i and its students. Cash, real estate, securities, and other assets can be given outright.
- **Cash** gifts include checks, drafts, and money orders. If your gift is mailed to the Foundation before the end of the calendar year and you itemize when doing your taxes, you're eligible for an income tax deduction for that year.
- Almost any marketable **Real Estate** (home, vacation property, land, rental property, other real estate) may be gifted to the Foundation, provided the property is unencumbered.
- Long-term, appreciated **Securities** are those you've owned for more than one year and have increased in value. Such a gift would entitle you to a federal income tax deduction for the full fair market value of the securities on the date of the gift, up to a maximum deduction of 30% of your adjusted gross income for the year if you itemize deductions. Short-term securities are those you've held for less than one year. If you itemize, you will be entitled to a federal income tax deduction for only the purchase price of the securities.
- **Corporate Matching Gift** policies vary from company to company, so please check with your Human Resources Office to see if your employer matches charitable gifts.
- **Memorial and Honorary Gifts** in remembrance of someone is a powerful way to perpetuate the values and ideals that guided someone's life. Honorary gifts commemorate a significant event or someone who is still alive.

## Planned Giving Options

- **Cash, Appreciated Securities, or Real Estate**—You can give cash, appreciated securities, or real estate during your lifetime, either in one lump sum or, by pledging an amount over a number of years.
- **Bequests**—You can make a gift through your Will or Revocable Living Trust. You can designate a percentage of your estate, a specific dollar amount, the rest and residue of your estate, or a combination of these options. This enables you to retain the use of all of your assets during your lifetime and make your gift when you no longer need those assets.
- **Beneficiary Designation**—You can make the UH Foundation the beneficiary of a life insurance policy or a qualified retirement plan such as an IRA, a 401(k) or a 403(b).
- **Charitable Gift Annuity or Charitable Remainder Trust**—You can make a gift of cash, appreciated securities, or real estate to, or in exchange for, a life-income plan, such as a Charitable Gift Annuity, deferred payment Charitable Gift Annuity, or Charitable Remainder Trust. The significant benefit here is that you receive lifetime income, an income tax deduction, and capital gains savings (if applicable). After you pass away, the remaining assets are distributed to the UH Foundation for the benefit of UH.

## UH Foundation Board Of Trustees

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### UH Foundation Executive Staff

- Donna J. Vuchinich, President & CEO
- Bill King, VP of Administration & CFO
- Janet Bullard, VP of Marketing & Communications—Alumni & Donor Relations
- Greg Willems, VP of Development



# Mahalo

to the 27,173 donors who partnered with us to support the 10 University of Hawai'i campuses statewide in fiscal year 2011.

Your 31,565 gifts raised \$46.7 million and are making an **Extraordinary Impact!**

"Student interest is very high in wanting to be a part of the solution to Hawai'i's sustainable future. Our community colleges will benefit from Mr. Shinshiro's foresight and generosity and we will all benefit from having a skilled workforce focused on sustainability."

**John Morton, Vice President for Community Colleges on Isamu Shinshiro's \$1.6 million estate gift**



In 2007 Jessica Stacy's dreams came true. She was awarded an athletic scholarship and an invitation to attend UH Mānoa. Thanks to this financial support she was able to swim competitively and focus on her academics. In 2011, Jessica graduated with a degree in psychology and a desire to give back to the community.

**"It makes a difference when someone else believes in your success."** ~ Jessica Stacy

"After graduating from high school, college was not an option due to financial hardships. It wasn't until later, after marrying and having children that I was advised by a guidance counselor to enroll in college. It has been a long journey but scholarships have helped fuel my determination to succeed, and enabled me to do my best!"

~ Shirley Dellinger, Recipient of the Osher Reentry Scholarship, UH Hilo

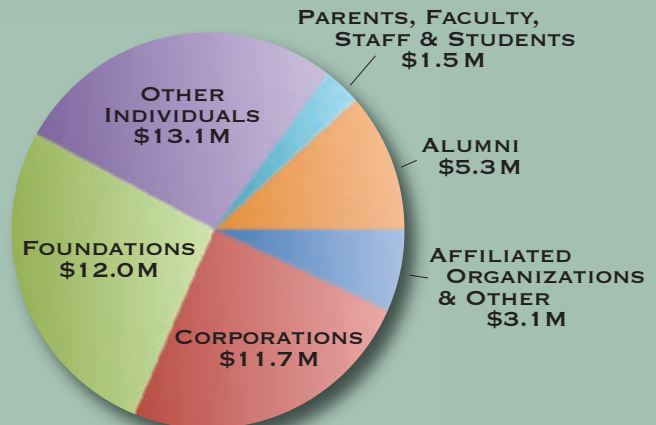
In May 2011 Shirley graduated with honors and a BBA, the first in her family to attain a college education. She is now the controller at Hospice of Hilo where she manages the accounting and HR departments.



## WHERE IS THE MONEY GOING?

- \$14.3M FOR FACULTY SUPPORT
- \$11.7M FOR RESEARCH
- \$10.7M FOR STUDENT AID  
LAST YEAR 1,648 STUDENT AWARDS WERE GIVEN OUT!
- \$10.0M IN SPECIAL PROGRAMS

## WHO GAVE?



**Judy Pyle's** \$2 million pledge to the Hawai'inuiākea School of Hawaiian Knowledge at UH Mānoa established an endowed dean's chair at the school. This fund will help build a "knowledge well of Hawaiian knowing" and support the revitalization of Hawaiian 'ōlelo (language) and culture and disseminating and preserving Native Hawaiian knowledge.



The University of Hawai'i Cancer Center has received significant private support this past year to fuel the development and expansion of its research expertise and programs.

Gifts include support for Dr. Michele Carbone's mesothelioma research. Mesothelioma is one of

the most deadly types of cancer. Recent scientific breakthroughs by the Cancer Center team will lead to new ways to prevent and treat the disease.

In the Harold L. Lyon Arboretum's Micropropagation Lab, a capital improvement donation by the Hau'oli Mau Loa Foundation will expand the lab and strengthen the lifeline for Hawai'i's endangered native plants.

