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Subject: Review Completed: 2019-2020 Scholarship Account Review Process
Date: Tuesday, June 4, 2019 2:40:00 PM
Attachments: [40-02-2098 - Collier, B & J - Dept Will Manage \(ACBS\).pdf](#)
[40-02-2566 - Oqden, Phil Range - Dept Will Manage \(SNRE\).pdf](#)
[40-12-4406 - Raskob, P. and Paulus, T.Endowment - Dept Will Manage \(FCS\).pdf](#)
[40-02-2072 - Maricopa Home Ec - Dept Will Manage \(Extension - Maricopa\).pdf](#)
[40-02-2055 - Aq Alumni Endow - Dept Will Manage \(Development\).pdf](#)
[40-12-4311 - Pierson Grad Fellowship-Plant Pathology - Dept Will Manage \(PLS\).pdf](#)
[40-12-4302 - Boynton Graduate Fellowship Endowment - Dept Will Manage \(PLS\).pdf](#)
[40-12-4207 - John S Niederhauser Grad Student - Dept Will Manage \(PLS\).pdf](#)
[40-12-0053 - Butler, Karl Plant Pathology - Dept Will Manage \(PLS\).pdf](#)
[40-02-2551 - Butler, Karl - Dept Will Manage \(PLS\).pdf](#)
[40-12-4580 - Zimmt, Werner S. ABE Graduate Student Conference Award - Dept Will Manage \(BE\).pdf](#)
[40-12-0006 - Frevert Endowment-Agriculture - Dept Will Manage \(BE\).pdf](#)
[40-12-4059 - Arthur and Mary Ewing Henderson - Dept Will Manage \(AREC\).pdf](#)
[20-10-1962 - Wild Cat Research and Conservation - Dept Will Manage \(SNRE\).pdf](#)
[40-12-4489 - Keithly Family Endowment - Dept Will Manage \(FCS\).pdf](#)
[40-12-0199 - SW Retail Center Oper. - Dept Will Manage \(FCS\).pdf](#)
[40-02-2063 - Fcr Gen Stu Supp - Dept Will Manage \(FCS\).pdf](#)

Hello unit heads and business managers,

Earlier this year, I was tasked with reviewing all endowments that were not already on Scholarship Universe and may pertain to student scholarships. I contacted you with my research, and you responded with confirmation that either CAS would manage the project as a scholarship, or you would manage the endowment in-house.

The list below contains the endowments where you have opted to manage them within your department. Please see yellow text below for full details on what this entails, the main statement you agreed to was: "You acknowledge that you and your department will follow all fiduciary compliance requirements associated with this endowment. **You will utilize the funds according to the requirements in the legally signed endowment agreement.** All queries about the management of the endowment's funds will be forwarded to your department."

I am including the Division Business Services team in this email to confirm that this project has been completed, and in case there is any monitoring that is needed on the college level regarding these accounts. This concludes my work with you on these specific projects, thanks for your help in reviewing these with me.

Thank you again,

Camille

Account Number (UAF and KFS if applicable) Description Purpose from UAFDN.org
Department Documentation that academic unit opts to manage this project:

40-02-2063

5568600 Fcr Gen Stu Supp Expenditures will be made from the expenditure account(s) for activities relevant to student programs in the School of Family and Consumer Resources as recommended by the Director of SFCR and approved by the Dean of the College of Agriculture. Such expenditures may include, but are not limited to: student support including operations, supplies, equipment purchases, stipends, wages, scholarships, travel, and seminars; extension activities including operations, supplies, travel, wages, and equipment purchases; and research support including operations, supplies, travel, wages, and equipment purchases. The Director of SFCR may elect to choose a focus for the funds available from the endowment for one or more years. In the event that the size of the endowment permits, the Director may elect to allocate funds to provide a portion or all of the funds required to underwrite an undergraduate or graduate student. The Director, at his or her discretion, may allocate funds to students based on need or academic standing or to promote ethnic diversity in the School. 0107 - Sch of Family & Consum Sci-Ins

40-12-0199 SW Retail Center Oper. Supporting & funding authorized SW Retail Center activities & programs. 0107 - Sch of Family & Consum Sci-Ins

40-12-4489 Keithly Family Endowment The Fund will be established to support the Norton School of Family and Consumer Sciences in the College of Agriculture and Life Sciences. Utilization of the Payout, described in the endowment agreement, shall be at the discretion of the Director of the School of Family and Consumer Sciences with a preference for students whose studies relate to fathers and parenting.

0107 - Sch of Family & Consum Sci-Ins

20-10-1962 Wild Cat Research and Conservation Program support (salary, travel, supplies, equipment, scholarships) for the development of the UA Wild Cat Research & Conservation Center, dedicated creating a hub at UA focused on researching & conserving the 36 species of wild cats worldwide. 0112 - Sch of Natural Resources-Ins

40-12-4059 Arthur and Mary Ewing Henderson Support undergrad. & grad. students education and/or research . 0118 - Agric & Resource Econ-Ins

40-12-0006 Frevert Endowment-Agriculture Support students in Agriculture Engineering. 0122 - Biosystems Engineering-Ins

40-12-4580 Zimmt, Werner S. ABE Graduate Student Conference Award The Fund is being established to support graduate students in the department of Agricultural and Biosystems Engineering (ABE) in the College of Agriculture and Life Sciences. The Fund will be used at the discretion of the department head in Agricultural and Biosystems Engineering to support attendance, as well as writing and presentations by graduate students at conferences or national meetings. 0122 - Biosystems Engineering-Ins

40-02-2551

5686900 Butler, Karl All gain which accrues, such as interest, appreciation, or gifts, will be added to the principle of the fund during the year. At the end of the fiscal year, the responsible office will evaluate the value of the principle and transfer 6% of the value of the principle, rounded to the nearest \$50, to the expendable account, available to the Plant Pathology Department. 0125 - School of Plant Sciences-Ins

40-12-0053 Butler, Karl Plant Pathology The income can be used by the Plant Pathology Department to support student scholarships, fellowships, faculty support including faculty recruiting, or any other Departmental expense deemed important by the Administrator for the Plant Pathology Department. 0125 - School of Plant Sciences-Ins

40-12-4207 John S Niederhauser Grad Student Provide Fellowships for graduate students in the division of Plant Pathology & Microbiology. Recipients will be known as Niederhauser Scholars 0125 - School of Plant Sciences-Ins

40-12-4302

5403210 Boynton Graduate Fellowship Endowment Endowment & Match for CALS Dept of Plant Sciences graduate students, w/priority to those working in the area of Plant Molecular Genetics, supporting fellowships, scholarships, assistantships, internships, grants, loans or other forms of support as deemed appropriate 0125 - School of Plant Sciences-Ins

40-12-4311 Pierson Grad Fellowship-Plant Pathology To support graduate students within CALS, School of Plant Sciences, with priority to those working in the area of Plant Pathology, Supporting Fellowship, Scholarship, Assistantships, Internships, Grants, Loan or other forms of Graduate student support as deemed appropriate by the School Head, Graduate College Dean and Dean of the College of Agriculture and Life Sciences. 0125 - School of Plant Sciences-Ins

40-02-2055

5550200 Ag Alumni Endow The College of Agriculture Alumni Council holds as one of its goals the promotion of academic excellence in higher education and the development and education of students of high moral character who demonstrate interest in scholarship and community service. To this end the Agricultural Alumni Council hereby establishes the Agricultural Alumni Student Award Program Endowment to fund special educational and student support programs in the College. Such awards may include, but are not limited to, academic scholarships for scholastic achievement, financial aid awards, loans, book awards, workstudy grants, community achievement awards, educational improvement grants, student service programs, student events, purchase of student equipment, or other related items. 0151 - CALS Devel and Alumni Affairs

40-02-2072

5567600 Maricopa Home Ec Expenditures will be made from the expenditure account(s) for activities relevant to Maricopa County Extension Home Economics programs as recommended by the Extension Director of Maricopa County, and approved by the Dean of

the College of Agriculture, or his/her designee. Such expenditures may include but are not limited to: support including operations, supplies, equipment purchase, stipends, salaries, wages, scholarships, travel, and seminars. The County Extension Director may focus the funds available from the endowment for one or more years. 1537 - Maricopa County Office 40-12-4406 Raskob, P. and Paulus, T. Endowment The Fund was established to support the Norton School of Family and Consumer Sciences in College of Agriculture and Life Sciences. Utilization of the payout, described in Paragraph 3 of Endowment agreement, shall be at the discretion of the Director of the School of Family and Consumer Sciences with a preference for students who are participating in the Personal and Family Financial Planning program. In the event the program ceased to be offered, the Director shall utilize the Payout for students whose studies relate to personal finance and/or financial literacy. 2407 - Sch of Family Consumer Sci-Res 40-02-2566

5579300 Ogden, Phil Range The intent of the stipend or scholarship is to reward and foster academic and/or research achievement and participation in professional and other activities associated with management of rangelands. Faculty can nominate candidates with a cover letter describing how the funds will support the student's academic and professional goals. The letter should be submitted to the Chair of the Ecology, Management, and Restoration of Rangelands program (or equivalent if program names are changed).

The stipend or scholarship will be awarded based on the following qualifications:

- Recipients must be currently enrolled as a full-time student in an undergraduate or graduate program in Ecology, Management, and Restoration of Rangelands (or equivalent if program names are changed) at the University of Arizona.

- For graduate students, consideration will be given to:

- o Academic record

- o Quality of research project and its contribution to sustainable livestock production on rangelands

- o Participation in Society for Range Management and related student activities

- o Merit of the proposed use of the award, as stated in the nomination by the faculty

- For undergraduate students, consideration will be given to:

- o Academic record

- o A demonstrated interest in rangeland management

- o Participation in student activities associated with rangeland management

- o Merit of the proposed use of the award, as stated in the nomination by the faculty

The stipend or scholarship will be awarded to a recipient or recipients chosen by Chair of the Ecology, Management, and Restoration of Rangeland Program (or equivalent if program names are changed).

It is recognized that over time the School of Natural Resources and the Environment may change in character and organizational structure. The intent of this endowment is to support students interested in the practical application of rangeland ecology and management. The

oversight of the endowment will be carried out by the successive directors of the School of Natural Resources and the Environment in consultation with appropriate officials of the University of Arizona. 2412 - Sch of Nat Resource&Enviro-Res
40-02-2098 Collier, B & J

5511300 Animal sciences graduate student support including tuition, travel, student scholarships, technology, equipment purchases and seminar support including honorarium and travel expenses for guest speakers. Donations from Bob and Jayne Collier. 2450 - Animal&Biomedical Sciences-Res

Camille Andersen, M.S.

Coordinator, Academic Information / Programs
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Subject: 2019-2020 Scholarship Account Review Process

Unit Heads and Directors,

Under the guidance of a scholarships process review completed by Division Business Services, my office will begin a review of all CALS UA Foundation endowments. The goal is to identify any scholarship-related accounts that are not currently listed on Scholarship Universe. All scholarships currently listed on Scholarship Universe will remain there and managed by CAS. This new review will only apply to scholarship or student support-related endowments that are not currently on Scholarship Universe and managed by my office.

If we find such endowments, you will have a choice as to how they are to be managed going forward. Please reference the attached PDF for a full description of the process we will follow. In short, Camille Andersen may contact you in the next few months to discuss any endowments that she discovered during our review. If Camille contacts you regarding an endowment, she will provide details on the account information and past spending. As a preview, your two options after the review are included below. *No action or decisions are needed from you unless we reach out.*

If you opt for Career and Academic Services to manage this endowment:

- The endowment income will be used in full to fund student scholarships based on the endowment agreement's eligibility requirements. The endowment will be listed on Scholarship Universe.
- Career and Academic Services will manage the entire scholarship process of the endowment (see below), including awarding and funds transfers from the UA Foundation.
- Your department's scholarship committee will select winners based on eligible applicants.

If you opt to manage this endowment internally in your own department:

- You acknowledge that you and your department will follow all fiduciary compliance requirements associated with this endowment. You will utilize the funds according to the requirements in the legally signed endowment agreement. All queries about the management of the endowment's funds will be forwarded to your department.
- The endowment will not be listed on Scholarship Universe. If you opt to use the funds for student scholarships, your department is responsible for the entire process:

- Setting up any corresponding KFS and financial aid item types (if applicable),
- Advertising the scholarship,
- Compiling applications,
- Selecting winners,
- Collecting student thank you letters to the donors and sharing these documents with CALS Alumni and Development,
- Awarding the winners on UAccess Student,
- Transferring funds from the UA Foundation (if applicable) to cover disbursed scholarship awards.
- Even if this endowment is managed in-house, you are expected to use the full amount of funds available per year. This is in line with all other student support-related scholarships in CALS.

This marks the final stage of our year-long process of bringing CALS scholarships into compliance with Foundation guidelines and endowment agreements. Please don't hesitate to let me know if you have any questions. And, thank you again for your patience and especially your support of Camille Andersen and her efforts in this important process.

Regards,

Mike

Michael Staten | College of Agriculture and Life Sciences

Bart Cardon Associate Dean for Career and Academic Services

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