

Q: What is “stewardship”?

A: While all members of the Department of Advancement and other members within faculties across campus work to steward gifts made by alumni and friends, Donor Relations is charged with proactively ensuring that the intent of all donors’ gifts are realized. Donor Relations also ensures, through a variety of means, that donors see how their gifts to UPEI have benefited the members of the University community, and that they are appropriately recognized for their generosity.

Q: Who receives stewardship reports from Donor Relations?

A: All donors who have created endowed funds at UPEI receive reports on an annual basis. In addition, donors can specify other family members who should receive such stewardship. We also send, from time to time, philanthropic summaries and reports on the activities within the donor’s area of interest.

Q: What is an endowed fund?

A: An endowed fund is one in which the original principal of a gift is never invaded and the gift exists in perpetuity. Endowments can be built over a period of time but are generally funded within five years of the initial contribution. Income is distributed annually pursuant to spending policies adopted by the UPEI Board of Governors – current policy provides for a 3.5% expenditure. UPEI has a minimum requirement of \$15,000 to establish an endowed fund.

Q: What is included in an endowed fund stewardship report?

A: This report includes detailed information about the fund’s financial activity and a message from the relevant Dean or program director.

Q: When will I receive my stewardship report?

A: Donors receive stewardship reports on an annual basis, usually at the same time each year. We strive to ensure that all donors receive timely stewardship. If a donor has not received stewardship for a number of years, s/he should contact Donor Relations. Please note that in most cases, we

provide detailed stewardship reports to endowed fund donors and to donors who have given at the \$25,000 or greater level.

Q: How are students chosen to be recipients of scholarships, awards and prizes?

A: Students are chosen based on how their backgrounds, academic interests and performance, and other qualities match the designation of the given scholarship, award or prize as provided for in the terms of agreement. The UPEI Scholarships and Awards Committee within the Department of Student Services has ultimate responsibility for approving all scholarship, award and prize recipients. Donor Relations works closely with Student Services, the Graduate Studies Office, and individual faculties to ensure that student recipients are selected based on the intent of the fund and the wishes of the donor.

Q: If I wish to make contact with my student recipient, why do I need to go through Donor Relations?

A: Donors and students greatly appreciate the chance to establish a relationship with each other; it often lasts well beyond the time that the student is at UPEI. The Department of Advancement must act as the liaison to establish this initial contact since we need to first check with students regarding their permission to share their phone number or email. Once contact is established, we encourage the donor and student to arrange for ongoing contact as they see fit.