



UNIVERSITY OF HAWAI'I SYSTEM

ANNUAL REPORT

REPORT TO THE 2006 LEGISLATURE

Annual Report on
University of Hawai'i Tuition & Fees Special Fund Expenditures
for the Purpose of Generating Private Donations
FY2005

Chapter 304-16.5 (c), Hawai'i Revised Statutes

November 2005

Report to the 2006 Legislature on University of Hawai'i Tuition and Fees Special Fund Expenditures for the Purpose of Generating Private Donations

Fiscal Year 2005

Expenditures

Hawaii Revised Statutes Section 304-16.5(c) provides that the University of Hawai'i Board of Regents, "...may authorize expenditures of up to \$3,000,000 annually, excluding in-kind services, from this fund [*University of Hawaii tuition and fees special fund*] for the purposes of promoting alumni relations and generating private donations for deposit into the University of Hawai'i Foundation for the purposes of the University."

In October 2002, the University of Hawai'i Foundation and the University of Hawai'i entered into an Agreement for Services to provide private fundraising and alumni relations services for the University. This agreement has three parts.

- First, the general fundraising support is provided at the rate of \$2,000,000 per year.
- Second, the agreement calls for the payment of 50% of the salaries and benefits of the Foundation's Unit Development Officers. For fiscal year 2005 this amount was \$614,593.
- Third, a payment of \$350,000 per year is made for alumni relations services.

In total for fiscal year 2005, the expenditures from the fund were \$2,964,593.

Reporting

The statute's reporting requirements were also revised. The statute requires a report "detailing the use of any funds authorized by the board under this subsection..." The following page summarizes the information provided in this report.

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Fundraising Activity
(\$000)

Attachment 1

	FY 2004	FY 2005
<u>By Source</u>		
Individuals	\$ 9,953	\$ 8,017
Corporations	3,989	5,911
Foundations	8,609	13,329
Other (Groups/Consortia, Clubs/Associations, Affiliated Organizations)	3,396	7,312
Total	\$ 25,946	\$ 34,569

<u>By Type</u>		
Gifts and Pledges	\$ 19,790	\$ 26,360
Deferred Gifts	1,638	1,964
Gifts in Kind	1,068	2,271
Grants to UH	3,450	3,974
Total	\$ 25,946	\$ 34,569

<u>By Category</u>		
Endowment	\$ 4,380	\$ 5,922
Expendable	17,048	22,402
Gifts in Kind	1,068	2,271
Grants to UH	3,450	3,974
Total	\$ 25,946	\$ 34,569

<u>By Purpose</u>		
Faculty and Academic Support	\$ 7,859	\$ 10,663
Student Opportunity and Access	7,486	9,033
Research	4,497	10,021
Other - Bldg, Public Svc, Special Projects	6,104	4,852
Total	\$ 25,946	\$ 34,569

Financial Summary of the Operating Activities of the Foundation

Attachment 2

	FY2005 Results
Revenues:	
Unrestricted gifts	\$ 143,192
Income from expendable accounts	928,039
Fee from endowment accounts	1,913,510
Service fee on gifts	411,810
Service fee on non-gifts	69,983
Other	17,940
Subtotal	\$ 3,484,474
UH contract for services	2,000,000
UH contract for services-Alumni Relations	350,000
Split funding for unit DOs	614,593
Total Revenues	\$ 6,449,067
 Expenses:	
Development	
Personnel	\$ 2,588,029
Program	758,329
Alumni Relations	
Personnel	330,794
Program	56,727
Service & Support	
Personnel	1,640,912
Program	560,448
UH Support Fund	150,000
Total Expenses	\$ 6,085,239
Revenues Over Expenses	\$ 363,828
Capital expenditures	69,337
Net	\$ 294,491

Departments Supported by the Moneys from the Fund

Attachment 3

- Development Operations
- Unit Development Officers
- Annual Giving – Calling Center/Direct Mail
- Scholarship Development
- Foundation Relations
- Corporate Relations and Principal Gifts
- Gift Planning
- Donor Relations / Special Events
- Development Research
- Alumni Relations

Purpose and Activities of Each Department and how They Participate in Fundraising Activities

Attachment 4

Development Operations

Development Operations supports the Foundation's fundraising through the following activities.

- Facilitate the identification of a lead 'prospect manager' whose responsibility is to ensure that there is a solicitation or stewardship strategy for each prospect or donor and that appropriate steps are being taken towards a solicitation. The prospect manager ensures that each contact with the donor reflects the best of UH and the Foundation.
- Hold monthly Unit Development Officer meetings to assign new prospects, review and provide collegial input to specific strategies, share successes and lessons learned, and keep each other informed of new projects, events and activities.
- Hold monthly (or as needed) meetings with each Unit Development Officer to review prospect strategies, next steps, resources needed, key relationships, etc.
- Coordinate and provide continuing training to development staff and academic leadership on campaign fundraising, cultivation and solicitation roles and responsibilities.
- Ensure that each Unit Development Officer is working to meet mutually agreed upon performance and fundraising goals.
- Work to ensure that prospects who have interests in more than one school or campus are actively and appropriately managed, and ensure that the prospects and donors from units who do not have assigned development staff are managed.

Unit Development Officers

The Unit Development Officers are housed at many colleges and campuses across the system. They are responsible for effectively managing relationships with individual donors and prospective donors across the UH system to achieve the philanthropic goals of both UH and the donor.

They work in close coordination with Chancellors, Deans and Directors to:

- Identify, cultivate and solicit individuals (alumni, friends, parents, community leaders and others) who have the capacity to make gifts of at least \$10,000 annually.
- Engage and provide training to volunteers.
- Steward current donors to ensure that UH remains among their top charities.
- Educate and involve faculty, staff and academic leadership in the fundraising process.
- Coordinate with other colleges, campuses or programs when appropriate.
- Ensure that donors are appropriately recognized.

Annual Giving – Calling Center/Direct Mail

Annual Giving is responsible for raising annual gifts, and instilling a habit of making annual gifts, from alumni, parents and friends of UH. These gifts are raised via direct-mail appeals, telephone solicitations, on-line giving (e-philanthropy) and matching gifts.

Annual Giving works closely with Unit Development Officers, Chancellors, Deans and Directors in producing annual giving appeals.

In order to provide an ever-increasing flow of annual gifts to the various units of UH, Annual Giving provides the following services, categorized into the four Annual Giving solicitation methods.

I. Direct Mail

Annual Giving provides all logistical and technical services for direct-mail appeals. Over \$1 million was raised through this effort in fiscal year 2005.

- Coordinate all logistical aspects of direct-mail solicitations, including:
 - obtaining data files for mailing;
 - printing of letterhead, envelopes and brochures as needed;
 - assembly (“stuffing”) of mailings;
 - coordination of first-class and third class (bulk) mailings with Post Office;
 - tracking and reporting of revenue and expenses from mailings.
- Assist each unit with developing a letter/message for each direct-mail solicitation tailored for that unit.
- Assist each unit with developing a brochure or other support materials for direct-mail solicitations.
- Provide support for other specialized appeals/mailings (such as an appeal for a specific endowment or scholarship fund).

II. Calling Center

Annual Giving operates a year-round calling center staffed by paid and well-trained UH undergraduate students.

- The calling center raised more than \$1 million in fiscal year 2005 for various units of UH by making nearly 50,000 contacts with UH alumni and friends which resulted in approximately 15,000 specific pledges of support.
- Annual Giving works closely with each unit to craft “talking points” to be used in calling scripts. Talking points include items such as: exciting faculty or student news; upcoming unit events or other unit news; how funds raised last year through Annual Giving were used; how funds raised in the current year will be used; etc.
- Chancellors, Deans and Directors are invited to meet with the callers and speak about their unit in conjunction with a calling campaign for that unit. Callers often have specific questions for

unit representatives that provide callers with additional talking points.

- Callers record feedback and questions from each unit's alumni and friends – this information is forwarded to the unit for action or information.

III. On-Line Giving

In order to better promote this method of giving, Annual Giving is:

- Printing the on-line giving web address (URL) on all materials being mailed from the office of Annual Giving.
- Promoting on-line giving in pledge reminders.
- Working with UH units to promote giving to their unit on that unit's web site with a prominent link to the on-line giving form from that unit's homepage.

IV. Matching Gifts

Many corporations will match gifts made by their employees to UH. The office of Annual Giving is exploring methods to enhance this source of revenue. These efforts include:

- Contracting with a nationally-known matching gift data house (HEP Development) to augment the Calling Center matching gift database.
- Implementing a matching gift reminder system to encourage donors who work for a matching gift company, but who have not submitted their employer's matching gift form, to submit their form.
- Promoting the benefits of matching gifts more prominently in print materials.

Scholarship Development

Scholarship Development is responsible for the development, establishment, and maintenance of student aid accounts. Scholarship Development serves as the central clearinghouse for Unit Development Officers, and UH administrators, faculty, and staff throughout the system, regarding any matters relating to student aid. In addition, the department oversees all payment of funds to students receiving any

type of student aid. Student Aid is defined as scholarships, fellowships, and awards. It is the responsibility of Scholarship Development to ensure that all awards made to students are in accordance with the wishes of the donors.

There are two different types of scholarships that UH donors support:

- An *endowed scholarship* creates a permanent fund. Contributions are invested to ensure the scholarship retains its value in perpetuity, and the scholarships created by the endowment are funded through the income generated by the endowment.
- An *annual scholarship* reflects a donor's commitment to support a scholarship for a specific number of semesters or years.

Scholarship Development collaborates closely with Chancellors, Deans, Directors, faculty members and the financial aid offices throughout UH, to develop scholarship accounts that most appropriately serve the needs of their students. Many steps are necessary to ensure the success of the program:

- With the unit development officers, engage donors who have specific interests. Prepare written agreements to ensure the donor's wishes are captured and clearly defined.
- Facilitate the development of proposals for system-wide student aid initiatives with the respective UH and UHF representatives.
- Ensure student aid opportunities are being advertised to students. Meet annually with high school counselors throughout the state to provide them with information on student aid opportunities for their students.
- Monitor activity in student aid accounts and be sure funds are being awarded to students who meet the criteria established by our donors.
- Identify student aid accounts with no activity and inquire with colleges/departments experiencing difficulty in making awards.
- Transfer funds to UH and inform the respective Financial Aid Office of students receiving aid so adjustments to student financial aid packages are made to avoid over-awarding of funds.

- Coordinate thank you letters from students and forward to donors.
- Disseminate annual reports to donors notifying them of student's who have benefited from their support.

Foundation Relations

Foundation Relations manages the relationships with private foundations in order to increase the amount of private foundation grants made to the research, academic, and community service projects of UH.

Foundation Relations works closely with the Chancellors, Deans, Directors and faculty throughout the system to identify priorities and submit professional proposals.

To maximize foundation giving and assist in securing needed resources, Foundation Relations carries out several activities. Some are aimed at laying the groundwork for the overall efforts of the University. Other services are provided in support of the development and submission of proposals for specific programs or projects. These include the following:

- Monitor foundation activity and trends, annual reports, news releases, requests for proposals, policy papers and other sources of information about major foundations.
- Coordinate, plan and perform visits to foundation staff to educate them about UH and its programs and to learn more about programmatic directions and decision-making processes.
- Facilitate the development and submission of proposals for system-wide initiatives pertaining to issues that are broadly relevant (e.g., when a coordinated approach would elevate the impact and significance of the project or the level and likelihood of funding).
- Operate as a central clearinghouse for administrators, faculty, staff, and development officers throughout the system, so that contacts with foundations are strategically coordinated.
- Identify relevant funding opportunities and disseminate this information to the University community.
- Gather and share information on lessons learned and successful

strategies for working with foundations.

- Assure positive, productive and coordinated communication – from the initial inquiry about a program through the submission of a final report and beyond – with foundation staff.
- Assist the unit in determining whether – and which – foundations are the right sources of funding for specific projects.
- Perform background research on foundations, their interests, approach to giving, limitations, and requirements.
- Share information about foundations that have been researched and/or visited, including the latest Request for Proposals, giving histories, special considerations, and pertinent relationships with staff.
- Assist in preparing proposals; review, edit and provide consultation on proposal format and content; offer guidance on particular foundations and their preferences; and compile necessary background documentation and cover letters.

Corporate Relations and Principal Gifts

Corporate Relations and Principal Gifts manages the relationships with corporations, corporate foundations the entrepreneurial community and major donors and serves as a catalyst for promoting and strengthening relationships between corporations and UH.

Corporate Relations and Principal Gifts works closely with academic units to identify priorities. Corporate Relations and Principal Gifts represents the broad priorities of the academic units to the corporate community and major donors, promoting opportunities for interaction.

Corporate Relations and Principal Gifts also works closely with the Office of Research Services and the Office of Technology Transfer. These activities include:

- Coordinate, plan and perform visits to corporations and corporate foundation offices to educate them about the University and its program and to learn more about programmatic directions and decision-making processes.
- Coordinate and plan corporate visits to campus in conjunction with unit development officers.

- Research corporate and corporate foundation interests in order to match them to academic areas.
- Facilitate the development and submission of proposals for system-wide initiatives pertaining to issues that are broadly relevant.
- Operate as a central clearinghouse for administrators, faculty, staff, and Unit Development Officers so that contacts with corporations are strategically coordinated.
- Identify relevant funding opportunities and disseminate this information to the UH community.
- Encourage the support of closely traded, start-up organizations:
 - Cultivation of successful entrepreneurs by encouraging hands-on involvement
 - Engagement of high-net-worth private equity investors who may become donor prospects in future years
 - Provide means for high-net-worth individuals who are currently donors to broaden their relationship with the University
 - Acquisition of funds to the UH through gifts of private equity
 - Support of the research initiatives throughout UH by bringing together capital, business expertise, and faculty research

Gift Planning

Gift Planning works to develop opportunities for individuals to support UH through charitable gift planning. Activities of Gift Planning to increase support for UH through gift planning include:

- Assist Unit Development Officers with their prospects and donors interested in supporting UH through planned gifts, either outright or deferred.

- Provide workshops for Unit Development Officers, Deans, Directors and faculty on gift planning opportunities.
- Meet personally with individuals and their advisors to assist them to include charitable planning in their estate plans, through bequests, charitable gift annuities, charitable remainder trusts, charitable lead trusts, and the pooled income fund; provide information on making planned gifts with appreciated securities, real estate, assets in qualified retirement plans, insurance policies, personal residence, vacation home, or farm with retained life estate, and other assets.
- Provide illustrations of the benefits of specific gift plans, and gifts of specific assets, for review by prospective donors and their advisors.
- Publish and distribute the newsletters Ho'oulu (for donors and prospects) and Financial Strategies (for allied professionals); place gift planning ads in each issue of Malamalama; assist major gift officers to place articles and advertisements about gift planning in other University of Hawai'i publications.
- Assist Unit Development Officers by providing seminars on charitable planning for prospects and donors.
- Maintain the Heritage Society, a donor society that honors and stewards friends, alumni, faculty, and staff who have informed the Foundation of their planned gifts to benefit UH. Members are invited as special guests of the President to attend an annual event on campus that showcases a unit or exceptional faculty member, and to other campus events.

Development Research

Development Research provides accurate, timely, and relevant information essential to the success of the Foundation's fundraising goals. The services of the Development Research are available to UH officials and Unit Development Officers.

Applying a unique set of skills and resources, the staff of Development Research gathers, interprets, analyzes, disseminates, and manages prospect data critical to securing grants and contributions, offering support at each stage of the development process. Services include:

- Research and prepare briefing bios for cultivation, solicitation or stewardship visits and contacts.
- Research and prepare prospect giving reports summarizing giving history, philanthropic interests and activities, private foundation details, and board affiliations.
- Research and prepare report on wealth indicators through public sources, including real estate properties, insider stockholding data, and private foundations.
- Prepare brief bios on guests attending strategic cultivation, friend-building and/or fundraising special events.
- Prepare summary report on multi-interest or system-wide prospects to facilitate strategic planning of next steps, detailing historical and current UH contacts, connections, and other key information.
- Prepare various prospect lists segmenting specific demographic or target groups, including unit or theme-focused prospect lists and regional prospect lists for advancement trip planning.
- Identify new prospects through electronic database screening, list segmentation and other strategies.
- Review, evaluate and rate prospects and assign preliminary capacity ratings.
- Add new prospects to an electronic prospect pool, distributing names to appropriate development officers.
- Manage and maintain an electronic Prospect Management System and facilitate the assignment of prospects to Unit Development Officers.
- Track and record data on alumni, donor or prospect interests, community and UH affiliations, gifts to other organizations, and board directorships.
- Maintain inventory of participation (invitation and attendance) in strategic alumni, donor or prospect cultivation and stewardship events.

- Respond to queries on prospects and other fund-raising-related issues and requests for prospect research from development officers.
- Track current news, reviewing local, national and international on-line and print materials, for UH related issues and alumni, donor and prospect information.
- Provide daily alerts on UH related news to Unit Development Officers and others and timely prospect alerts to appropriate fundraisers.
- Provide resource library for use by Unit Development Officers.
- Provide overview of the services available through the Development Research to new Unit Development Officers and assist in development services training as needed.
- Deliver meaningful service and products based on best available information by keeping up-to-date on current fund-raising trends and philosophy and by using the latest prospect research techniques, strategies and trends.

Donor Relations / Special Events

I. Donor Relations

Donor Relations is responsible for managing the Foundation's stewardship activities and representing the interests of major donors to all ten campuses of UH. Donor Relations works with the Foundation's fundraisers and UH personnel to ensure that donors are thanked in appropriate, distinctive, visible and memorable ways and are informed about how their gifts are being used. Donor Relations helps to strengthen and sustain the Foundation's reputation for integrity, responsibility, caring, and prudent management of private gifts.

Donor Relations engages in many activities to support development staff and academic leadership in the stewardship process:

- Ensures that the intent of the gift is observed and the donor's interests are represented. When in question, helps determine intent of the donor in making gifts.

- Prepares gift agreements and interfaces with unit leadership and unit development staff to develop and implement a stewardship plan for each major gift donor to the unit.
- Coordinates the preparation and mailing of annual reports to endowment donors.
- Oversees all activities for the Founders (\$100,000 cumulative) and Hoku (\$1 million cumulative) giving programs, including benefits packaging and distribution, Founder's plaque processing and donor presentations, special stewardship activities, as well as working with the UHF Information & Technology Services department to ensure accurate gift club membership records are maintained.
- Coordinates with Annual Giving and Gift Planning to ensure coordinated stewardship efforts among gift-club level donors.
- Works with the Special Events to plan and conduct annual or bi-annual donor recognition and cultivation events for high level gift clubs. The magnitude and prestige of these events attracts larger gifts from donors seeking to attain membership in any one of the Foundation's gift clubs.
- Reviews data to identify newly qualified members of high level gift clubs and identify donors who are nearly qualified so an appropriate volunteer or Foundation staff member can invite them to membership.
- Oversees notification of next-of-kin when memorial gifts are made. Work with next-of-kin as needed to assure that the memory of their loved one is properly honored by the Foundation and UH.
- Establishes a structured, systematic program of stewardship at the Foundation that will outlast changes in staff and ensure perpetual cordial relations with donors.

II. Special Events

Special Events assists other Foundation units in the strategic planning, budgeting, negotiating, organizing, and coordinating of special events that benefit the Foundation and UH.

- Special Events has experience in assisting in a variety of special events: donor recognition, inaugural events, prospect gatherings, scholarship receptions, and unit based events.
- Donor Recognition
 - Founder Club Member Dedications: Founder's Club dedications serve to recognize donors whose gifts exceed \$100,000.
 - Gift Clubs: Annual Giving and Special Events organizes donor events to honor and formally recognize annual donors to UH. They provide opportunities to highlight points of excellence within the 10 campuses and commit to higher levels of giving.
 - Planned Giving Events: Planned Giving hosts an annual luncheon held in mid-February for which Special Events provides logistical support.
- Inaugural Events - Donor Relations and Special Events organizes inaugural events for newly endowed professorships and lectureships. These are typically hosted by the UH and Foundation Presidents and include a reception, dinner and lecture or program for the donors, special guests, and members of the College's faculty, staff and student body.
- Prospect Gathering - Small gatherings of donors and prospects are sometimes scheduled in conjunction with the UH and Foundation Presidents' travel.
- Scholarship Receptions - Receptions for each campus are typically held in the spring for all students on financial aid and all donors and interested parties for the College's named scholarship funds. The University of Hawaii at Manoa reception has grown to attract over 400 people and donors and recipients of the funds are seated together. Remarks are made by the UH President or Chancellor, Foundation President and students. Student entertainment is also provided.
- Unit Based Events - Special Events supports the events in which both the UH and Foundation Presidents are involved and functions held at the President's house. Special Events is available to provide support or guide the Unit Development Officers as needed on an individual needs basis which includes

but not limited to: creating budgets, logistics support & resources.

Alumni Relations

The Alumni Relations department in partnership with the University of Hawaii Alumni Association is creating an alumni program that enhances and develops the relationship between UH alumni (system-wide) and their alma mater through:

- Educational programming
- Networking and reunion opportunities
- Electronic services
- Career services
- Membership and affinity
- Promoting and enhancing the reputation of the University

Expenditures of the Funds Authorized by the Board for Each Department
by Primary Expense Category

Attachment 5
Page 1 of 3

General Fundraising Support
Fiscal Year 2005

Funds Received from University	Total \$ 2,000,000
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Funds Expended	Primary Expense Category		Total
	Payroll	Other	
Development Operations	\$ 219,191	\$ -	\$ 219,191
Unit Development Officers	689,393	-	689,393
Annual Giving - Calling Ctr/Direct Mail	163,301	-	163,301
Scholarship Development	136,563	-	136,563
Foundation Relations	167,839	-	167,839
Corporate Relations and Principal Gifts	117,255	-	117,255
Planned Giving	199,748	-	199,748
Donor Relations/Special Events	157,415	-	157,415
Development Research	149,295	-	149,295
Total Funds Expended	\$ 2,000,000	\$ -	\$ 2,000,000

Expenditures of the Funds Authorized by the Board for Each Department by
Primary Expense Category

Attachment 5

Page 2 of 3

50% of Unit Development Officers Payroll Costs
Fiscal Year 2005

Funds Received from University	Total
	<u><u>\$ 614,593</u></u>

Funds Expended by Primary Expense Category	Total
Payroll	<u><u>\$ 614,593</u></u>
Total	<u><u>\$ 614,593</u></u>

Units Supported	
Astronomy/Architecture	UHH
CBA/TIM	Maui CC
CTAHR	Kapiolani CC
Education	Kauai CC
Engineering	Windward CC
Law	Leeward CC/UHWO
Arts & Sciences	JABSOM
Libraries	CRCH
Athletics	Nursing/Social Work

Expenditure of the Funds Authorized by the Board for Each Department
by Primary Expense Category

Attachment 5
Page 3 of 3

Alumni Relations

Funds Received from University	Total
	\$ 350,000
Funds Expended by Primary Expense Category	Total
Payroll	\$ 307,618
Payroll-Information Technology	23,176
Temporary Personnel Costs	3,955
Recruitment/Relocation	255
Consultant/Legal	10,892
Business Meetings/Protocol/Travel	16,528
Duplication/Printing/Postage/Supplies	7,036
Outside Information Technology	6,945
Other	11,116
Sub-total	\$ 387,521
Capital expenses	1,238
Total Funds Expended	\$ 388,759
Use of Carry Over	(38,759)
Total	\$ 350,000
Carry Over from Fiscal Year 2003-2004	\$ 84,008
Use of Carry Over in Fiscal Year 2005	(38,759)
Net Remaining Carry Over	\$ 45,249

Moneys from the Fund Transferred to Any Fund of the University

Attachment 6

No moneys from this fund were transferred to any fund of the university.

Amounts and Purposes of All Expenditures from the UH Support Fund

Attachment 7

Purpose	President Office Expenses	Special Events	Total
Business meetings	\$ 6,732	\$ 46	\$ 6,778
Membership Dues/Prof Meetings	6,206		6,206
Materials & supplies	1,769	1,285	3,054
Office supplies & expense	4		4
Printing & duplicating	32	976	1,008
Protocol	15,630	12,412	28,042
Receptions		17,223	17,223
Recruitment/Relocation	390		390
Registration fees	8,130		8,130
Services	308	1,392	1,700
Travel	2,311		2,311
Miscellaneous		187	187
Total	\$ 41,512	\$ 33,521	\$ 75,033

UH Support Fund Balance:

Beginning Balance at 7/1/04	2,057
Amount transferred this fiscal year (from Financial Summary - Attachment 2)	150,000
Income from special events	4,880
UH Support Fund expenditures	(75,033)
Allocation to VPs for Academic Affairs & Student Affairs	(15,000)
Ending Balance at 6/30/05	<u>66,904</u>