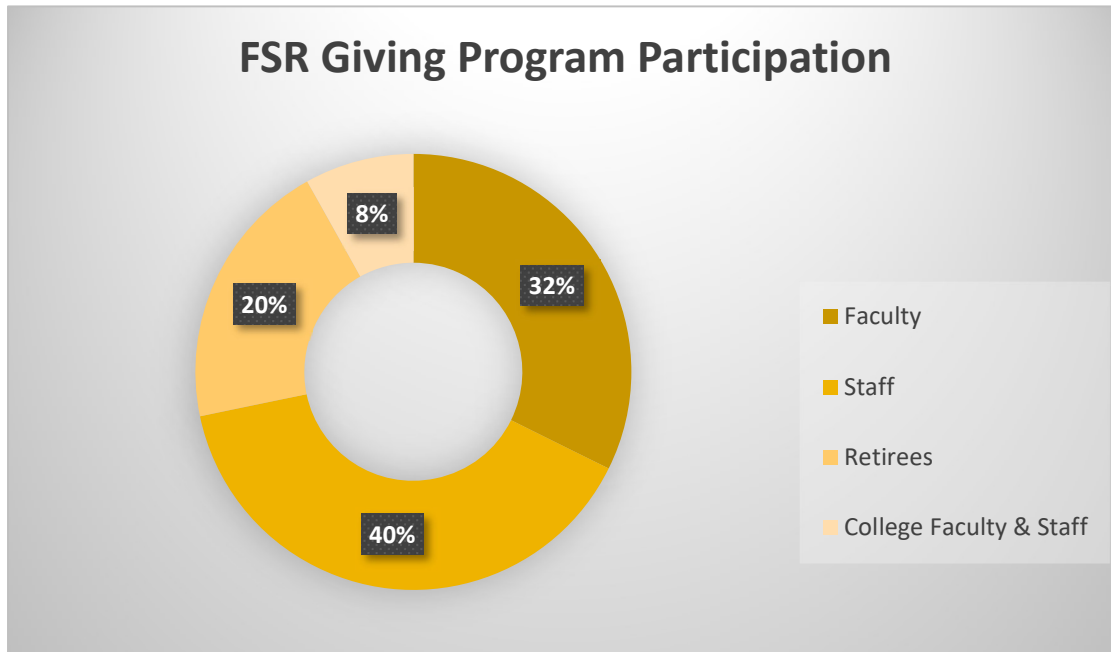


**OVERALL FSR GIVING PROGRAM REVENUE** - May 1, 2019 to April 30, 2020: \$2,238,286  
**OVERALL FSR GIVING PROGRAM PARTICIPATION** - May 1, 2019 to April 30, 2020: 1236 donors



Donations to the Faculty, Staff and Retiree Giving Program remain steady while we are seeing growth in our participation rate year over year. Over the past year, donations from UWaterloo retirees accounted for 57% (or \$1,286,269 ) of the total revenue, which now stands at \$2,238,286. Our generosity is even more impressive considering that UWaterloo retiree donors account for only 20% of all donors to the Faculty, Staff and Retiree Giving Program. CONGRATULATIONS! To date, 312 UWaterloo retirees (15% of all UWaterloo retirees and an increase from 12% last year) donate to the Faculty, Staff and Retiree Giving Program. Imagine the level our donations could reach and the causes we could support if we continued to grow our participation!

**UW RETIREES BURSARY ENDOWMENT**

	<b>2019/20</b>
Opening Balance	381,019
Contributions to Principal	120
Portion of Realized Investment Income for CPI Increase to Principal	6,097
Expendable Amounts Transferred to Principal	0
<b>Closing Balance as at April 30, 2020</b>	<b>387,236</b>

The principal is the amount that cannot be spent and is used to generate investment income. The principal includes donations and matching contributions, amounts added to principal for inflation protection (“CPI Increase”) and expendable amounts transferred to principal. All amounts in the chart below are reported at book value.

**Fund Description**

The University of Waterloo Retirees' Association established the Retirees Award fund to assist undergraduate and graduate students who have proven financial need. Bursaries are awarded to full or part-time graduate or undergraduate students enrolled in any discipline at the University of Waterloo.

In FY20, the UW Retirees Bursary supported thirteen bursaries of \$1,000 each:

- 1 Applied Health Science Doctoral
- 3 Engineering Master's
- 2 Arts Master's
- 1 Applied Health Science, Honours Coop
- 1 Arts, Honours Coop
- 2 Accounting & Financial Management, Honours Coop
- 1 Environment, Honours Coop
- 1 Global Business & Digital Arts
- 1 Mathematics, Honours

**2020-21 Expendable Projection**

We anticipate an "income allocation" or expendable of 11,617. This expendable is based on the current year's opening principal of 387,236 and the expected expendable rate of 3%.

**UW RETIREES SCHOLARSHIP ENDOWMENT**

	<b>2019/20</b>
Opening Balance	297,749
Contributions to Principal	4,952
Portion of Realized Investment Income for CPI Increase to Principal	4,764
Expendable Amounts Transferred to Principal	0
<b>Closing Balance as at April 30, 2020</b>	<b>307,465</b>

The principal is the amount that cannot be spent and is used to generate investment income. The principal includes donations and matching contributions, amounts added to principal for inflation protection ("CPI Increase") and expendable amounts transferred to principal. All amounts in the chart below are reported at book value.

**Fund Description**

The UW Retirees Scholarship(s) made possible by the support of Waterloo retirees, are presented annually to outstanding Graduate student(s) and Undergraduate students as funds permit, on a rotating basis through the faculties. Graduate recipients must hold an Ontario Graduate Scholarship (OGS) or Queen Elizabeth II Graduate Scholarship in Science and Technology (QEII-GSST).

In FY20, the UW Retirees' Scholarship Fund supported eight scholarships.

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Waterloo Retirees' Scholarship Fund

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Dylan Spicker	Mathematics Doctoral	\$5,001
Emilie Louis	Science A Honours	\$1,000
Althea Serro	Environment HCO	\$1,000
Zhengmao Ouyang	Software Engineering	\$1,000
Orna Awele Charles-Obazei	Applied Health Sci HCO	\$1,000
Ryan Dancy	Software Engineering	\$1,000
Eric Liu	Computer Science HC	\$1,000
Grace Enns	Global Business & Digital Arts	\$1,000

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#### **2020-21 Expendable Projection**

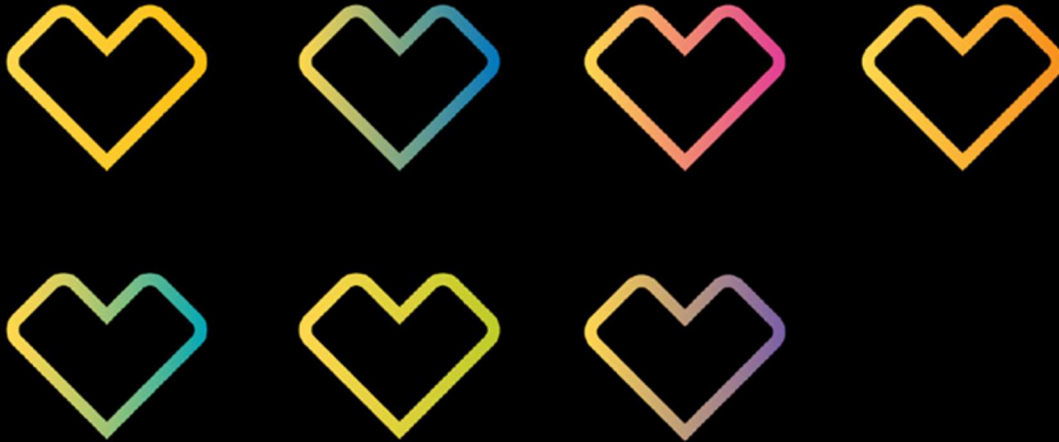
We anticipate an "income allocation" or expendable of 9,224. This expendable is based on the current year's opening principal of 307,465 and the expected expendable rate of 3%.

#### **FSR GIVING PROGRAM REBRANDING**

Waterloo faculty, staff and retirees form a community that truly reflect the heart of Waterloo. Working together to deliver teaching and academic excellence, experiential learning, world changing research, and an incredible student experience, they are united by shared values that inspire pride and connection. As such, a new graphic image has been created to better represent this group of donors as they support the University's mission to connect, propel and challenge our world. Moreover, they advance one of the most relevant, connected and innovative institutions in the world. Investing in each other means their hearts are in this together – faculty, staff and retirees, along with students and alumni – working to create a university they are proud to belong to.

## CAMPAIGN SYMBOL – FACULTY PALETTES

When appropriate, a faculty's primary colour may be merged with the Waterloo yellow to subtly distinguish each faculty.



### FSR TALENT SEARCH

In the month of May we will be hosting a virtual talent contest and encouraging our faculty, staff and retiree to share their talents and vote for winners. More details about this competition and prizing will be available in May and shared via email and the daily bulletin.

For more information about the Faculty, Staff and Retiree Giving Program and other giving opportunities at the University of Waterloo, please contact [FSRgiving@uwaterloo.ca](mailto:FSRgiving@uwaterloo.ca).