



# TEXAS A&M FOUNDATION AND SCHOLARSHIPS

MARCY ULLMANN, SENIOR DIRECTOR OF SCHOLARSHIP  
PROGRAMS

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# TEXAS A&M FOUNDATION

Serves as the primary academic fundraising arm of Texas A&M University

- ▶ \$2 billion net assets (as of 06/30/2018)
- ▶ \$103.5 million paid to Texas A&M (as of 06/30/2018)

Lead by Example Campaign (publicly launched in November 2015) – joint effort between Texas A&M University, the Texas A&M Foundation, the 12<sup>th</sup> Man Foundation, The Association of Former Students and the George Bush Presidential Library Foundation

- ▶ \$4 billion by 2020 – largest fundraising endeavor ever undertaken in Texas
- ▶ \$3.18 billion (as of 07/30/2018)

Over 60 fundraising professionals spread across campus (in every college), central office (Jon Hagler Center) and around the state in D/FW, Houston and Galveston

# WHO WE ARE

**HISTORY** The Texas A&M Foundation was established in 1953 by **21 distinguished former students** who recognized the need to enhance Texas A&M's major-gift fundraising efforts.

**VISION** The Texas A&M Foundation's vision is to be among the **very best American university -affiliated fundraising and asset management organizations** in order to enhance Texas A&M's capabilities as a world-class university.



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THE TEXAS A&M  
FOUNDATION'S **MISSION** IS  
TO UNITE GENEROSITY AND  
VISION TO RAISE AND  
MANAGE MAJOR ENDOWED  
GIFTS THAT SUPPORT THE  
FUTURE OF TEXAS A&M  
UNIVERSITY.



# WHY ARE SCHOLARSHIPS IMPORTANT?

Scholarships serve as four primary tools:

- ▶ Recruitment
- ▶ Rewards
- ▶ Recognition
- ▶ Retention

# TYPES OF SCHOLARSHIPS

Scholarships start with donors:

- ▶ Endowed Scholarships – various giving levels
- ▶ Pass Through Scholarships/One Time Gifts – provides immediate money to students

Scholarships recruit deserving students and give them the extra money and time they need to excel in their studies

# IMPACT OF TEXAS A&M UNIVERSITY MOTHERS' CLUBS

- ▶ In 2017, the Federation gave a total of \$707,949 in gifts
- ▶ Total giving - \$12.7 million (matching gifts not included)

# DIFFERENCE IN TEXAS A&M FOUNDATION AND SCHOLARSHIPS & FINANCIAL AID

## Texas A&M Foundation

- ▶ Sets-up the endowment with the donor
- ▶ Invests and manages all funds

## Scholarships & Financial Aid Office

- ▶ Processes all pass through scholarships
- ▶ Pooled and Endowed Accounts – earnings (income) sent to SFAO to award scholarships based on criteria of the gift agreement
- ▶ Requests TAMF to move funds from donor accounts to the fiscal accounts when awarded to students

# SCHOLARSHIP PROGRAM ACCOUNTS

## PES, EOA, SUL ROSS & RUDDER

Annual award amount is set for the entire group of accounts in a particular program

Excess income for the group can help sustain the annual award amount through some years if a decreased payout occurs

Endowment principal also at set level(s) – not beneficial to add gifts or income back to the endowment

*\* PES (President's Endowed Scholarship); EOA (Endowed Opportunity Award Scholarship)*

# NON-PROGRAM SCHOLARSHIPS

Annual award amount is determined by the income of the single account

Excess income for the account remains available until requested by TAMU – it is not returned to the principal

As the donor of the account, a written request can be made to move funds from the income to the endowment. Additional gifts can be made to the endowment at any time to increase the principal and this will generate additional income which can increase award amounts or the number of awards given

# BASICS OF AN ENDOWMENT

Minimum is \$25,000

May be funded with a one-time gift or over a period of five-years

Requires a Gift Agreement

Scholarship will be awarded approximately 18 months after endowment is fully funded

No 5% development fee for Aggie Mothers' Clubs

Current payout is 4% (\$1,000 on \$25,000)

# COMMON CRITERIA

- ▶ Academic Achievement
- ▶ Extracurricular Involvement
- ▶ Financial Need
- ▶ City, County, School District or particular High School
- ▶ Zip Code
- ▶ Participation in a specific High School or College Activity
- ▶ Major Field of Study
- ▶ Leadership Attributes
- ▶ First Generation
- ▶ Specify Incoming Freshman, Upper Classmen or Transfer Student

# CRITERIA NOT ALLOWED

- ▶ Ethnicity
- ▶ Religion
- ▶ Gender
- ▶ Age
- ▶ National Origin
- ▶ Educationally Unrelated Handicaps
- ▶ Personal Characteristics or Appearance

# BENEFITS OF ENDOWMENT

- ▶ Perpetual Giving – clubs will always have a scholarship in their name
- ▶ Flexible – ability to change criteria as club geography changes
- ▶ Market Growth
- ▶ Club and Individual Donors may add to endowment as they see fit

# QUESTIONS

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## STAY CONNECTED



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*by* EXAMPLE