

# ANNUAL REPORT

2016–2017

## FUNDRAISING RESULTS

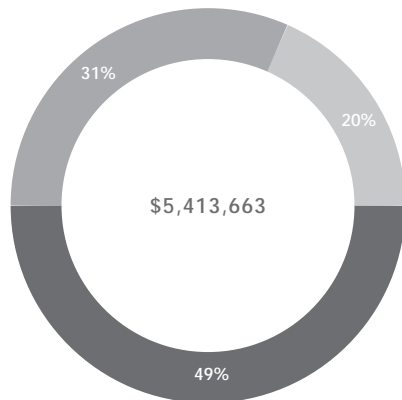
The University of Winnipeg Foundation engages alumni and friends who are passionate about The University of Winnipeg and its Collegiate; provides opportunities to enhance its academic, research, and community outreach programs; and guarantees professional stewardship of the donations it receives.

The University of Winnipeg Foundation's goal is to increase financial support for campus priorities. Each year we aim to increase the number of donors, volunteers and friends of the University and the Collegiate, and the number and size of gifts made. Every gift received helps UWinnipeg support talented and eager to learn students, attract and retain first-rate faculty members, fund innovative research and encourage community engagement.

This past year, more than \$5.4 million was raised to support such initiatives and the Strategic Directions of the University and its Collegiate.

### TOTAL RAISED

April 1, 2016–March 31, 2017



STUDENT AWARDS: \$1,651,399  
PROGRAMS: \$1,133,369  
CAPITAL PROJECTS: \$2,628,895

## ENDOWMENT FUND PERFORMANCE

The Foundation stewards over 590 endowment funds to date. Scholarships and bursaries comprise the largest number of individual endowments established by donors. While the specific terms of these awards differ, they share a collective goal of increasing access to a life-changing UWinnipeg education.

While scholarships and bursaries are the largest category of endowed funds, individual endowments support and drive all aspects of the University's strategic priorities from facilitating faculty and student research, to supporting Wesmen athletics programs, to Collegiate initiatives and creating a healthier tomorrow for our surrounding communities.

Growth of the Endowment Fund is a priority for the Foundation and the following section provides information on how The University of Winnipeg Foundation Endowment Fund is managed and invested, as well as an update on investment performance as of March 31, 2017.

### THE INVESTMENT COMMITTEE

The Board of the Foundation determines the investment policies of the Endowment Fund. The Investment Committee advises the board as to appropriate investment policies as well as the selection and review of the investment manager(s).

The Investment Committee members are Mr. Daniel Bubis (Chair), Mr. Darren Baccus, Senior Vice-President and Chief Legal Officer, PSP Investments; and Mr. Peter Simmie, Founder and Chief Investment Officer, Bristol Gate Capital Partners.

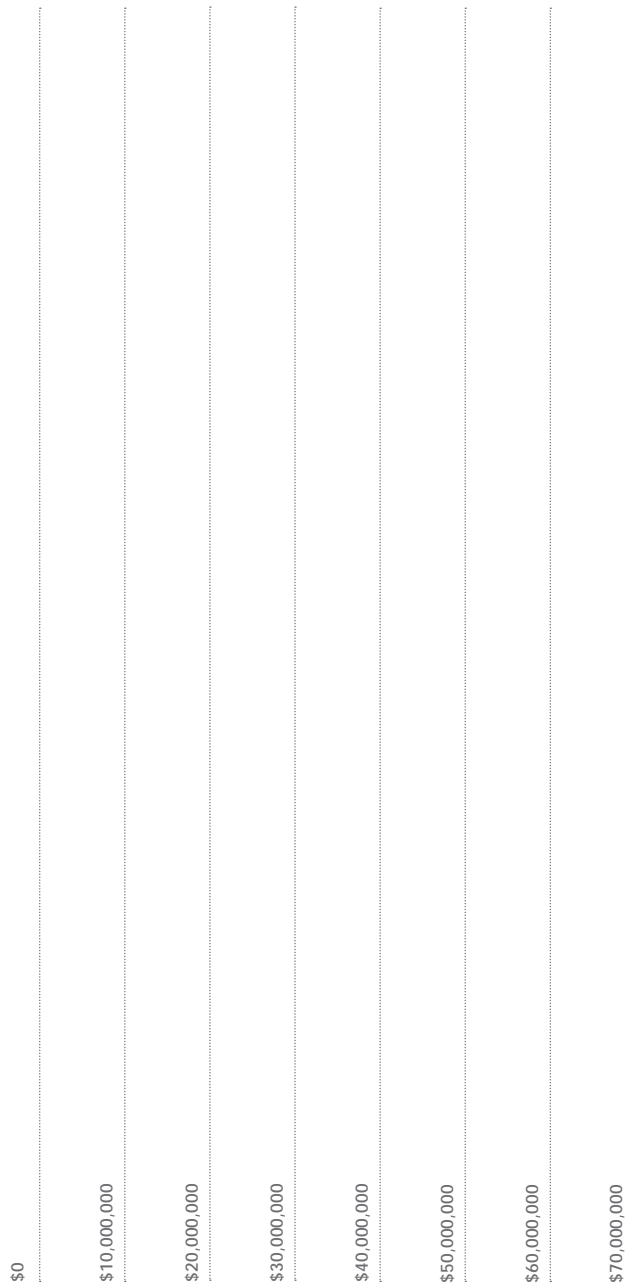
### INVESTING THE UWF ENDOWMENT

The Foundation's investment policies call for a conservative and balanced approach, utilizing cash, fixed income, as well as Canadian and foreign equities to prescribed limits. Equities are not to exceed 70% of the portfolio. The Foundation's investment policies are designed to provide consistent long-term growth while protecting the purchasing power of the Endowment Fund. The Foundation does not invest in speculative or high-risk investments.

### 2016–2017 HIGHLIGHTS

The University of Winnipeg Foundation is pleased to report the completed transition from a contributed capital endowment fund model to a unitized model. Each individual endowment account holds a unitized value.

	TOTAL PORTFOLIO	BENCHMARK	% ABOVE BENCHMARK
3 YEARS	9.23	8.60	0.63
5 YEARS	11.17	10.14	1.03
10 YEARS	6.46	6.05	0.41



■ CONTRIBUTED CAPITAL  
 ■ MARKET VALUE

**USE OF FUNDS**

Gifts are made to the University based on the contributed capital in each endowment fund for use by the University in accordance with the Terms of Reference established for each fund. The University, through its Senate and Awards Office, is responsible for the selection of qualified candidates for student awards.