Volunteer Notebook



Welcome from the Vice Chancellor of Advancement

Thank you for your service and support of MU. As one of our important volunteers, we have compiled the material in this resource book to help you better understand and communicate the purpose of the *Mizzou: Our Time to Lead* campaign, which will focus on three priorities:

Endowment — Building our endowment to compete with other institutions will strengthen our ability to attract and retain stellar students and faculty.

Signature Centers and Institutes — Interdisciplinary centers and institutes will be the engine of research growth that will enhance our AAU status and attract additional funding.

Campus Renaissance — New and renovated facilities will propel Mizzou to global leadership in education and research.

On the following pages you will find information on our priorities and how your support will impact MU. You'll also find campus contact information and resources to support you as an advocate for Mizzou. As a reminder,

- Mizzou is the oldest public university west of the Mississippi River.
- We are a major land-grant institution with a statewide mission of service to citizens and we are Missouri's largest public research university.
- We are one of only 34 public universities, and the only public institution in Missouri, to be selected for membership in the prestigious Association of American Universities.
- We created the world's first and best school of journalism.
- Our student-athletes play in the SEC, the most competitive conference in collegiate athletics.
- Our alumni go on to change the world as CEOs, entrepreneurs, senators and presentatives, doctors, nurses, lawyers, and other professionals.

With these strengths in our favor, there is simply no reason why Mizzou should take a backseat to anyone. The *Mizzou: Our Time to Lead* campaign will build on our foundation of excellence to establish Mizzou as a destination university for the world's best students and faculty.

I invite you to visit our website (giving.missouri.edu/campaign) for campaign progress updates and stories of how donor support makes a real-world impact on our campus every day.

On behalf of the University of Missouri, thank you for choosing to volunteer for the *Mizzou: Our Time to Lead* campaign. This \$1.3 billion fundraising effort is vital to Mizzou's continued greatness. We will be successful because of the support of generous alumni and friends like you.

Sincerely,

1

Thomas S. Hiles Vice Chancellor University Advancement

Why Your Support Matters

What difference will it make to the students, the faculty and the staff at MU when we raise more than \$1 billion? Indeed, what difference will our success mean to Missourians and partners around the nation and globe if we raise more than \$1 billion?

Private investment will change the face of MU. Our goals are to:

- Build MU's Endowment
- Create Signature Centers and Institutes
- Foster a Campus Renaissance

Close to home, our success will build MU's endowment and make us highly competitive with peer institutions for students, faculty, research dollars and athletic prowess. A healthy endowment allows us to be certain that we will always be able to provide funding for our top priorities, maintain a vibrant scholarship base and attract and retain our scholar teachers.

Comprehensive campaigns such as *Mizzou: Our Time to Lead* reaffirm the University of Missouri's commitment to what endures while making the case for what's to come. At its heart, a university exists to enhance society and improve our quality of life through education. What happens beyond that, by whom and for whom, is what sets the University of Missouri apart. The history of MU is one of people with vision -- those who saw the need for a state university and what it could do for society and took action to make that dream a reality. It's *Mizzou: Our Time to Lead*.

Mizzou: Our Time to Lead will:

- Advance teaching and learning
- Expand discovery
- Promote globalization
- Enrich the arts and creativity
- Maximize innovation to increase economic development

When we are successful, we will have a model for leveraging state and private support for priorities such as endowed scholarships, endowed faculty positions and capital projects.

All of our constituencies will have renewed pride in Mizzou. All of us — students, faculty, alumni, donors, parents, researchers, patients, fans and the state legislature — will be proud that Mizzou invites and rewards investment and deep commitment.

All of the economic benefits that a top-tier university provides to the region, the state, the nation and the world will increase.

Our vision for *Mizzou:* Our *Time to Lead* is clear and we invite you to join us. Together we will embrace the Mizzou spirit. Your engagement and your gifts are what will make this campaign a success. We value beyond measure your loyal support and are encouraged by the generosity of all who are with *Mizzou:* Our *Time to Lead*.

Campaign Elevator Speech and Timeline

With an overall fundraising goal of \$1.3 billion, the *Mizzou: Our Time to Lead* campaign will secure the University of Missouri's status among the nation's elite public universities by focusing on three priorities:

Endowment — Building our endowment to compete with other institutions will strengthen our ability to attract and retain stellar students and faculty.

Signature Centers and Institutes — Interdisciplinary centers and institutes will be the engine of research growth that will enhance our AAU status and add to our distinctiveness.

Campus Renaissance — New and renovated facilities will propel Mizzou to global leadership in education and research and will help attract and retain students and faculty.

(2)	2012	Campaign counting begins / Planning committee formed
NIN	2013	National Campaign Cabinet meets
PLANNING	2014	Campaign Case Statement Tour
<u> </u>	2015	October - Public Kickoff
	2016	Regional Kickoff Events / Hall of Fame Event
SE	2017	Columns Society Recognition Event
PHA	2018	Impact Alumni Tour
PUBLIC PHASE	2019	Final Push
PUE	2020	Surpass campaign goal
	2021	Victory / Thank you Tour

Endowment: A Lasting Legacy

Endowments have benefitted MU students, faculty, facilities, and programs since James Rollins established the first endowment at Mizzou in 1888. Established with a gift of \$6,000, the James S. Rollins Scholarship Fund is now valued at more than \$230,000. Think about that: a scholarship created by one of MU's founders continues to provide scholarship support for the students of today – and tomorrow.

How It Works

Think of an endowment as a fund that is invested and distributions are made each year. By preserving the endowment principal, the distributions can forever fund student scholarships, faculty research, or whatever the donor chooses. Recent changes at MU will help endowments grow over time to keep up with the cost of tuition, salaries, and research.

The minimum amount to establish an endowment may vary but starts at \$25,000, and can be given in installments for up to five years.

How It's Spent

MU distributes 4.5 percent* of the fund's value annually based on a policy that preserves the principal and spending power of the endowment.

By The Numbers

3,626: Total number of active endowments

By Use:

- 33% scholarships
- 23% faculty positions
- 15% programs
- 14% unrestricted
- 15% other

*The formula used to determine the Endowment Pool spending distribution for each fiscal year shall apply a rate of 4.5% to a base equal to the 28-quarter trailing average of market values as of December 31st of the prior fiscal year.

\$1,000,000 >>>> \$45,000 approximate amount to be distributed \$250,000 >>>>> \$11,250 approximate amount to be distributed \$100,000 >>>>> \$4,500 approximate amount to be distributed \$50,000 >>>>> \$2,250 approximate amount to be distributed \$25,000 >>>>> \$1,125 approximate amount to be distributed

Signature Centers and Institutes



The Donald W. Reynolds Journalism Institute (RJI) founded in 2004 through support of a \$31 million grant from the Donald W. Reynolds Foundation. The RJI building was completed in 2008 in conjunction with the centennial celebration of the University of Missouri's School of Journalism.

Interdisciplinary collaboration is a Mizzou hallmark. With a wide array of expertise located on the same campus, including schools and colleges of agriculture, arts and science, business, engineering, journalism, law, medicine, and veterinary medicine, Mizzou is an ideal environment for making connections across fields of study to foster learning and discovery that will make a real-world impact.

By combining donor passions with Mizzou's strengths, our Signature Centers and Institutes pull the very best of MU together and provide the framework for interdisciplinary collaboration. Our Signature Centers and Institutes include:

- Thompson Center for Autism and Neurodevelopmental Disorders
- Reynolds Journalism Institute
- Kinder Institute on Constitutional Democracy

We have several more centers and institutes on the horizon, such as the Center for Regenerative Orthopaedics and the Applied Learning Center at the Trulaske College of Business. These centers and institutes will be the engines of growth that will bolster our standing within the prestigious Association of American Universities and significantly increase our endowment. We envision five to 10 fully endowed centers or institutes with endowments of at least \$10 million each as indicators of the *Mizzou: Our Time to Lead* campaign's success.

Campus Renaissance

The University of Missouri, with the Columns at the heart of the "red campus" and the "white campus" anchored by Memorial Union, is a beautiful college setting. To achieve global leadership in research and teaching, however, Mizzou must enhance the physical spaces that enable our faculty and students to do their best work. The *Mizzou: Our Time to Lead* campaign will provide funding for critically needed new buildings, as well as renovations to existing facilities.

While construction jobs are good for the local and regional economy, more important for MU is how capital projects help attract stellar faculty



Thomas and Nell Lafferre Hall is currently undergoing a major rennovation that is slated to be completed in December 2016.

and students. Recent examples of construction benefitting MU include the Reynolds Journalism Institute, the Bond Life Sciences Building, the renovation of Tate and Switzler Halls and the student-funded Student Center and Recreation Center.

Many schools and colleges will have capital projects as part of their strategic priorities for *Mizzou: Our Time to Lead*. MU's highest-priority capital projects include:

- Dedicated School of Music building and a renovated Fine Arts Building (College of Arts and Science)
- Applied Learning Center (Robert J. Trulaske, Sr. College of Business)
- Lafferre Hall renovations (College of Engineering)
- Mizzou Sports Park projects (Intercollegiate Athletics)

We will leverage private support to build public/private partnerships. By combining private support with state money, we will honor Mizzou's formidable architectural traditions while adapting to changing needs.

To care for our buildings is to respect our history. To create new buildings signals growth and momentum. Visible investments in Mizzou's infrastructure will make our campus come alive and prepare us for the vital work of the future.

There are many ways to give to the University of Missouri based on your goals, as outlined below. For more information, contact the Office of Gift Planning and Endowments toll-free at 1-800-970-9977 or email us at giftplanning@missouri.edu.

*All donors should consult with their attorneys or financial advisers for tax and legal advice.

Immediate Impact				
Check/Credit Card	Securities		Real Estate	
Send a check or contribute online using your credit card	Securities may publicly traded bonds, or mut	d stocks,	Real estate may be given after approval by the University	
Benefits to You: Simple, tax deductible Benefits to You: Simple, tax deductible Benefits to You: Simple, tax deductible			Benefits to You: Avoid capital gains tax, taxdeductible	
Tangible Proper	ty	Int	angible Property	
Examples include artwork, and coin collections, jewelry, furnit books		Patents, copyrights, websites, and royalties may be given under certain conditions with the University's approval		
Benefits to You: Consult your to learn the benefits of gifts o property			u: Consult your tax adviser enefits of gifts of intangible	

Planned Giving				
Bequest	Beneficiary Designation	Life Insurance		
A bequest is created through your estate plan, such as a will	Fill out a beneficiary form for your insurance policy, retirement or bank accounts	Make MU owner of policy as well as beneficiary		
Benefits to You: Flexible, donor retains control throughout lifetime	Benefits to You: Simple, flexible, takes donated assets out of your taxable estate	Benefits to You: Income tax deduction for gift of policy and any premium payments you continue to pay, takes asset out of your taxable estate		

If you need income now, you may want to consider a life income arrangement that provides income now with a future gift to the University. For more information, contact the Office of Gift Planning and Endowments toll-free at 1-800-970-9977 or email us at giftplanning@missouri.edu.

*All donors should consult with their attorneys or financial advisers for tax and legal advice.

Income Arrangement

Charitable Gift Annuity

the University in exchange for life payments

Simple, contractual agreement with the Donate assets University in which assets are transferred to provides an o

Benefits to You: Immediate tax deduction for portion of gift, annuity payments may be partially tax-free and capital gains tax liability reduced when funded with appreciated securities.

Charitable Remainder Trust

Donate assets to a charitable trust that provides an ongoing stream of income

Benefits to You: Immediate tax deduction for portion of gift, can fund with appreciated securities to reduce capital gains liability, payments for life or term of years, real estate can be used with approval of University

Pooled Income Fund

Similar to a mutual fund, gifts from multiple donors are "pooled." Prorated shares of the fund's earnings are distributed to all donors.

Benefits to You: Immediate tax deduction for portion of gift

Retained Life Estate

Give your home or farm now, but continue to live there and retain the right to any income during your lifetime

Benefits to You: Receive current charitable tax deduction and future benefits to your taxable estate



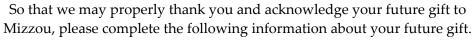
Prefer to make your gift or pledge online? Please visit **giving.missouri.edu**.

I would like my gift to benefit:	
☐ Chancellor's Fund for Excellence 001331☐ General Scholarship Fund 180181	☐ School/College of
I am making this gift in honor/memory of (optional))
How I would like to donate:	
Single Contribution	
☐ I/we wish to make an outright gift of \$ to my/ou	payable to the "University of Missouri" (CHECK ENCLOSED) r credit card.
Recurring Gift	
□ I/we promise to make our gift in equal installment total amount of \$□ I/we intend to make payments: □ Weekly □	nts of \$ beginning in (month/year) for a Monthly Quarterly Annually
Matching Gift	
\square This pledge includes anticipated \$ in	n matching gifts from
Giving information	
☐ My check, payable to the University of Missouri,☐ Please charge my credit card:☐ Visa☐ Ma	
CARD NUMBER	_ EXPIRATION DATE
SIGNATURE	PRINT NAME
Gifts are tax-deductable to the fullest extent allowe	d by law.
Help us say thank you	
Your gift may qualify you for membership in one of	the university's recognition societies.
$\ \square$ I/we wish my/our name(s) to read as follows on	honor rolls: (Please Print)
NAME(S)	
☐ I/we prefer my/our name(s) to be confidential.☐ I/we would like information on membership in the	ne Columns Society, Jefferson Club, or Legacy Society.
Please return this form to:	Thank you for your support.

UNIVERSITY OF MISSOURI GIFT PROCESSING 407 REYNOLDS ALUMNI CENTER COLUMBIA, MO 65211 PHONE: 573-882-0256 TOLL FREE: 866-267-7568 GIFTPROCESSING@MISSOURI.EDU

Office of Gift Planning and Endowments

Estate Gift Intention Form





		/ /		/ /
Name	I	Date of birth	Spouse Name (if applicable	e) Date of birth
Mailing address			Telephone (residence)	
City	State	Zip	Telephone (business)	
Type of Gift —				
☐ Will ☐ Living	Trust 🗖 Life	e Insurance	Retirement Plan C	Other:
Description of G Please describe the na description of specific	ture of your gift	to Mizzou (for	example - percentage of esta	te, specific dollar amount,
			<i></i>	
As of today's date, I e	stimate the valu	e of this provis	ion in my estate plan to be \$ _	
	0 .		beneficiary and will only recent arrangements:	eive the gift under certain
Durmasa of Cift				
Purpose of Gift This is an unre This gift is to be	estricted gift. The used for the fo	ollowing purpo	ose or program:	
the size of this future	gift may be sign	ificantly differe	ommitment on my/our estate. ent from the amount estimated lan, I/we will notify you so th	d above. If for any reason in
Signature		Date	Signature	Date
		nning and En	<i>return to:</i> dowments ■ University of M MO 65211 ■ 800/970-9977	

Private giving is essential to MU's ability to succeed and provide for the future, and we want to thank alumni and friends for the roles they play. The university honors individuals who give at certain levels through membership in various giving societies, including the Jefferson Club, Chancellor's Society, Legacy Society and the societies of our schools, colleges and programs.



COLUMNS SOCIETY

The Columns Society recognizes donors who make it a priority to support MU year after year. Donors who make annual gifts totaling \$2,500 or more during an academic year are recognized by membership in the Columns Society. Young alumni and friends (35 and under) and MU faculty and staff qualify with annual gifts of \$1,500 or more.

Web: giving.missouri.edu

Phone: (573) 884-3672 | Email: columns-society@missouri.edu

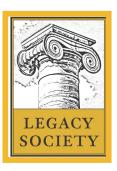


JEFFERSON CLUB

Jefferson Club recognizes donors whose lifetime giving totals \$25,000 or more. All gifts and pledges count toward this total.

Web: jeffersonclub.missouri.edu

Phone: (573) 882-6511 | Email: jeffersonclub@missouri.edu



LEGACY SOCIETY

Planned gifts create the margin of excellence at Mizzou. Donors who establish a planned gift of any amount qualify for membership in the Legacy Society.

Web: legacysociety.missouri.edu

Phone: (800) 970-9977 | Email: giftplanning@missouri.edu

Named Gift Guidelines

Establishing a named gift to support students, programs, facilities, or faculty creates a legacy on campus while affirming the impact of a Mizzou education. MU offers various named gift opportunities, with minimum amounts described as follows. Naming opportunities are approved in accordance with University policy.

Naming Opportunity	<i>Mizzou: Our Time To Lead</i> Campaign Endowment
Endowed Named Scholarships	
Endowed Named Scholarship	\$25,000 minimum
Flagship Scholarship	\$300,000 - \$1.2 million
Faculty Positions (Endowed)	
Faculty Scholar	\$100,000 - \$250,000
Professorship	\$1 million
Chair	\$1.5 million - \$2.5 million
Dean	\$5 million
Other Endowed Funds	
Minimum Endowment	\$25,000
Fund for Excellence	\$50,000
Research Fund	\$100,000
Lecture Series:	
Department Lecture Series	\$25,000
School or College Lecture Series	\$100,000
Campus Lecture Series	\$1 million
Programs	
School or College	\$30 million - \$100 million
Center/Institute	\$5 million - \$25 million
Department/Academic Unit	\$5 million - \$25 million
Facilities and Spaces	
Buildings (New Construction)	Minimum of 25-50% of the construction cost
Buildings (Existing)	Minimum of 25-50% of the construction cost for renovation/replacement
Other spaces (Interior & Exterior)	University discretion based on factors such as size, location, usage
Endowed Athletics Positions	
Head Football Coach	\$5 million
Head Men's Basketball Coach	\$5 million
Other Head Coaches	\$2 million
Assistant Coaches	\$1 million

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

- To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
- To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
- To have access to the organization's most recent financial statements.
- To be assured their gifts will be used for the purposes for which they were given.
- To receive appropriate acknowledgment and recognition.
- To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.
- To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
- To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
- To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
- To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

The following pages contain contact information for advancement offices equipped to help you based on your geographic location or area of interest.

We appreciate your interest in supporting the University of Missouri and we want to make it as easy as possible for you to contact our advancement team. Wherever you live, our advancement team is happy to assist you.

Mizzou Advancement

407 Reynolds Alumni Center Columbia, MO 65211 Phone: 573-882-6511

Email: GiftProcessing@missouri.edu

giving.missouri.edu

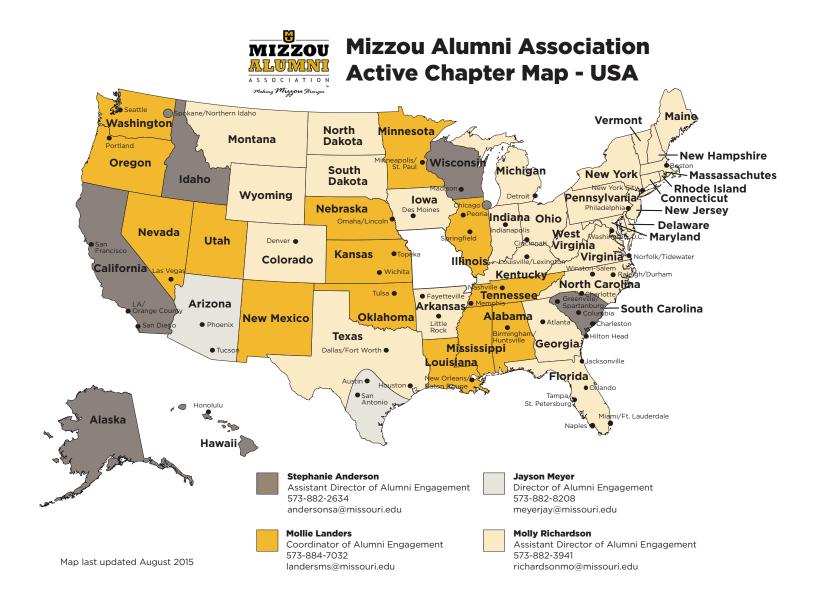
Mizzou Alumni Association

123 Reynolds Alumni Center Columbia, MO 65211 Phone: (800) 372-6822

Email: MAA@missouri.edu

mizzou.com

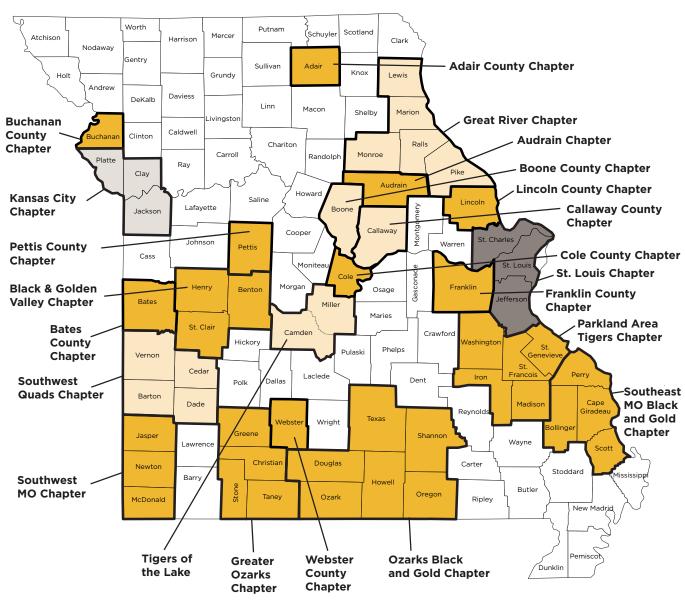
The Mizzou Alumni Association relies on the help of more than 1,300 volunteers nationwide to serve the best interests and traditions of Missouri's flagship university. Volunteers are the lifeblood of the association and honor Mizzou with their dedicated service.





Mizzou Alumni Association Active Chapter Map - Missouri

Map last updated August 2015





573-882-2634 andersonsa@missouri.edu

Mollie Landers

Coordinator of Alumni Engagement 573-884-7032 landersms@missouri.edu

Jayson Meyer

Director of Alumni Engagement 573-882-8208 meyerjay@missouri.edu

Molly Richardson

Assistant Director of Alumni Engagement 573-882-3941 richardsonmo@missouri.edu

Below is a list of presidents for each of the Mizzou Alumni Association geographic alumni chapters. To visit the chapter website or contact a president visit Mizzou.com and click on "Groups," and then choose the "Alumni Chapter Locator."

Audrain County Chapter | Tony Robertson

Bates County Mizzou Club | Bryan Milligan

Bay Area Tigers Chapter | Carson Reese

Boone County Chapter | Denise Falco

Buchanan County Chapter | John Garvey

Callaway County Alumni Chapter | Timothy Conner

Capital Area Tigers | Jennifer Paul

Central Florida Alumni Chapter | Matt Friedman

Central Iowa MU Alumni Chapter | Jim Rothermich

Central Iowa MU Alumni Chapter | Jessica Wardenburg

Chicago Alumni Chapter | Michael Wojtychiw

Cole County Chapter | Mark J. Baker

Dallas/Ft. Worth Mizzou Tigers | Bill S. Richmond

Franklin County Chapter | Kim Voss & Rich Buckman

Greater Boston Alumni Chapter | Lindsey Hoffman

Greater Ozarks Alumni Chapter | Andy Stewart

Greater Peoria Alumni Chapter | Dustin Johansen

Houston Texas Tigers | Mary Beth Mosley

Indiana Mizzou Crew Alumni Chapter | Bret Pogemiller

Kansas Area Tigers | Cheryl Wiss

Kansas City Alumni Chapter | Jeff Zumsteg

Korea Ag Alumni Organization | Yang Boo Choe

Korea Alumni Chapter | Heung Kil Ko

LA/Orange County Alumni Chapter | Adam Phillip Gafke

Las Vegas Alumni Chapter | David Conrado

Lincoln County Chapter | Kelsey Flynn

Little Rock Chapter | Mallory Lindsey

Memphis/Mid-South Alumni Chapter | Julie Lynn Cameron

Metro Atlanta Alumni Chapter | Brent Adams

Miller County Chapter | Rick Caine

Mizzou Philly Chapter | Brittany Root

Morgan County Chapter | Kevin Paul Schehr

Motor City Tigers | Deborah Diers

Music City Mizzou | Justin Shepherd

New York Alumni Chapter | Rebecca Johnson

Northeast Florida Chapter | Matt Krueger

Northwest Arkansas Chapter | Heather A. Martinelli

Ozarks Black & Gold Chapter | Betty L. Stock & Marge Slayton

Oregon Trail Tigers Chapter | Debra Weekley

Rocky Mountain Tigers | Rusty Martin

San Antonio Alumni Chapter | Brad Lehman

San Diego Alumni Chapter | Jane Wagner

Seattle/Puget Sound Alumni Chapter | Chris Ward

Below is a list of presidents for each of the Mizzou Alumni Association geographic alumni chapters. To visit the chapter website or contact a president visit Mizzou.com and click on "Groups," and then choose the "Alumni Chapter Locator."

South Louisiana Alumni Chapter | Kathy Baker Southeast Missouri Black & Gold Chapter | Larry Simon Southern Arizona Tigers Chapter | Ron Pemstein Southwest Florida Alumni Chapter | Jason Philips Southwest Missouri Alumni Chapter | Rachel Greene **St. Louis Alumni Chapter |** Elizabeth Gaines Sullivan County Chapter | Jeremy Mosley Tampa Bay Tigers Chapter | Katie Heckert Tidewater Tigers Alumni Chapter | Craig Moeller Tigers of the Corn Chapter | James W. Simmons **Tornado Alley Tigers-Wichita KS** | Mitch Adams Tulsa Alumni Chapter | Jon Lawrence **Twin Cities Chapter |** Cary Reed Weatherby Valley of the Sun Alumni Chapter | Amy Grimes Washington D.C. Chapter | Heather Starek Webster County Alumni Chapter | Jay Dade Spokane/Northern Idaho | Laura Skaer Madison, WI | Christian Badger and Brett Blomme Greenville/Spartanburg, SC | Guy Furay Columbia, SC | Lex Ames Hilton Head, SC | Roger Clark Honolulu, HI | Morgan Hawley and Alicia Swartz Cincinnati | Sean Hannum **Great River (Hannibal/Quincy)** | Jerry Schoenborn Miami | Tony Garrett Parkland Area Tigers | Pat King Tigers of the Lake | John Shelby Triangle Tigers (Raleigh/Durham) | Melissa Everitt Triad Mizzou Alumni (Greensboro/Winston-Salem) | Lauren Bolinger Western North Carolina | Lauren Schatz

Mizzou Near You: Central Advancement

Vice Chancellor for Advancement Tom Hiles, Vice Chancellor

301 Reynolds Alumni Center Phone: (877) 738-6108

Fax: 573-884-5144

Advancement Records

<u>Management</u>

(Biographical Records & Gift Processing)

S. Diane Bartley, Director of Gift

Compliance/Auditor

Penny Blank, Office Manager 407 Reynolds Alumni Center

Phone: 573-884-7709

Email: GiftProcessing@missouri.edu

<u>Advancement Creative Services</u> Catey Terry, Executive Director

306 Reynolds Alumni Center

Phone: 573-882-6511 Fax: 573-882-5144

<u>Corporate & Foundation Relations</u> Sherry Wilson, Executive Director

306 Reynolds Alumni Center

Phone: (888) 527-6881 Fax: 573-884-5144

<u>Donor Relations</u> Carin Huffman Grinch, Director

306 Reynolds Alumni Center Phone: (877) 738-4546

Fax: 573-884-5144

Email: donorrelations@missouri.edu

Gift Planning & Endowments Suzanne Flanegin, Executive Director

302 Reynolds Alumni Center Phone: (800) 970-9977

Fax: 573-884-5144

Email: giftplanning@missouri.edu

Organizational & Professional Development Deb Snellen, Director

407 Reynolds Alumni Center

Phone: 573-884-6689 Fax: 573-884-5144

Regional Programs Kevin Heyen, Executive Director

302 Reynolds Alumni Center

Phone: (866) 738-8447 Fax: 573-882-4542

Mizzou Near You: Units, Schools, & Colleges

College of Agriculture, Food and Natural Resources

Thomas Payne, Vice Chancellor and Dean

2-69 Agriculture Building

573-882-3752

Darcy Wells, Executive Director of Advancement

2-4 Agriculture Building Phone: 573-882-7009 Fax: 573-884-8174

Email: givingtocafnr@missouri.edu

College of Arts & Science

Michael O'Brien, Dean

317 Lowry Hall 573-882-4421

Tim Hausman, Executive Director of Advancement

110 Lowry Hall

Phone: 573-882-4409 Fax: 573-884-1695

Email: advanceas@missouri.edu

Chancellor's Fund for Excellence

Gena Scott, Director of Advancement

109 Reynolds Alumni Center

Phone: 573-882-6371 Fax: 573-884-5144

College of Education

Daniel Clay, Joann H. Hook Dean's Chair in Educational Renewal

118 Hill Hall 573-882-8524

Vacant, Director of Advancement

114 Hill Hall

Phone: 573-882-5111 Fax: 573-884-0559

Email: CoEDevelopment@missouri.edu

College of Engineering

Elizabeth Loboa, Dean

W1025 Lafferre Hall 573-882-4375

Ann Baker, Executive Director of Advancement

W1006 Thomas & Nell Lafferre Hall

Phone: 573-882-2099 Fax: 573-884-4948

Trulaske College of Business

Stephen Farris, Interim Robert J. Trulaske, Sr. Deanship

407 Cornell Hall 573-882-6688

Jeremy Diener, Executive Director of Advancement

408 Cornell

Phone: 573-882-6768 Fax: 573-884-1675

Graduate Studies

Leona Rubin, Associate Vice Chancellor for Graduate Studies and Associate Vice President for Academic Affairs and Graduate Education

210 Jesse Hall

Phone: 573-884-1402

Mark Thomas, Senior Director of Advancement

210 Jesse Hall

Phone: 573-884-1402 Fax: 573-884-5454

School of Health Professions

Kristofer Hagglund, Dean

510 Lewis Hall 573-884-6705

Matt Osterthun, Director of Advancement

512 Lewis Hall

Phone: 573-882-4209

Mizzou Near You: Units, Schools, & Colleges

College of Human Environmental Science

Sandy Rikoon, Interim Dean

113 Gwynn Hall 573-882-6227

Nancy Schultz, Senior Director of Advancement

122 Gwynn Hall

Phone: 573-884-9081 Fax: 573-884-4807

International Fundraising

Ann Ryan Solomon, Director of Advancement

109 Reynolds Alumni Center

Phone: 573-882-2350 Fax: 573-884-5144

School of Journalism

David Kurpius, Dean

120 Neff Hall 573-882-6686

Colin Kilpatrick, Executive Director of Advancement

103 Neff Hall

Phone: 573-882-0334 Fax: 573-884-2430

School of Law

Gary Myers, Dean

231 Hulston Hall 573-882-3247

Lisa Eimers, Senior Director of Advancement

205 Hulston Hall

Phone: 573-882-4374 Fax: 573-882-4984

MU Libraries

Ann Riley, Interim Director

104 Ellis Library 573-882-9169

Matt Gaunt, Director of Advancement

104 Ellis Library Phone: 573-882-9168 Fax: 573-882-8044

School of Medicine

Dr. James P. Stannard, Hugh E. and Sarah D. Stephenson Deanship

MA202 Medical Services Building 573-884-9080

Yvonne Miller, Executive Director of Advancement

One Hospital Drive, DC205.00 Columbia, MO 65212

Phone: 573-882-6100 Fax: 573-884-4809

Mizzou Advantage

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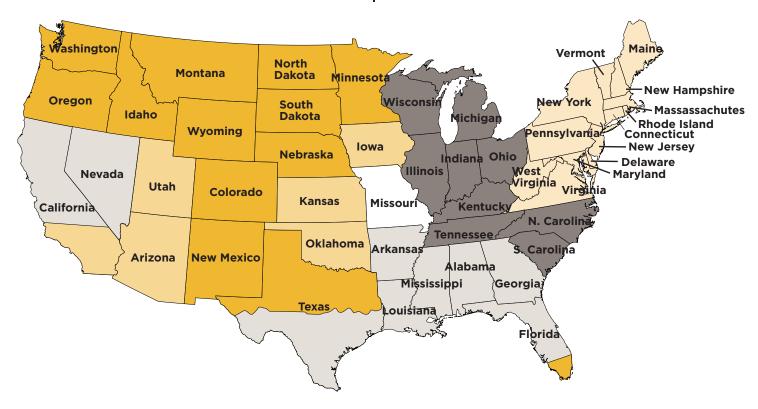
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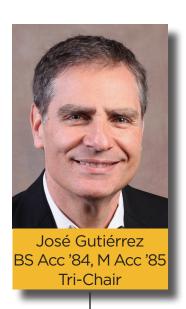
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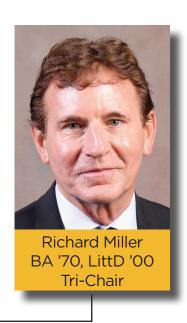
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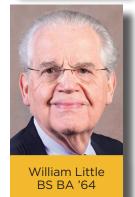
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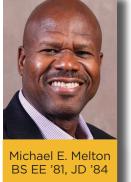










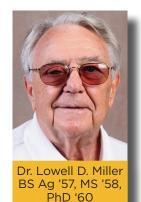




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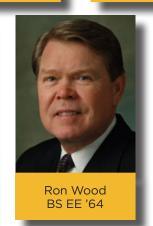
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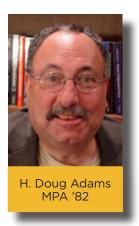




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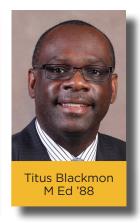




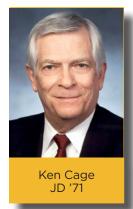






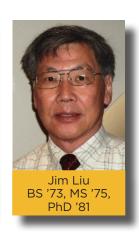










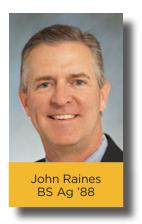






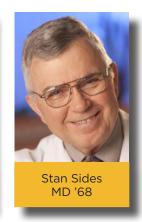


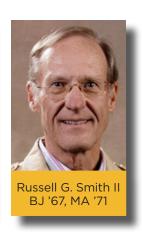
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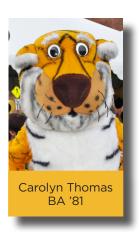




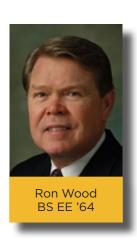








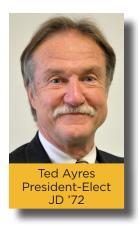




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Tom Hiles
Vice Chancellor for Advancement

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As Vice Chancellor for University Advancement, Tom directs MU's fundraising and alumni programs, which will announce Mizzou's \$1 billion-plus campaign in October 2015. Tom leads a dynamic Advancement team committed to building a culture of excellence through passion, teamwork, and engagement.

Prior to coming to MU in July 2012, Tom had served as Vice President for Institutional Advancement/
President of the Foundation at Bowling Green State University in Bowling Green, Ohio, since 2010. He was

Vice President for University Advancement at Western Kentucky University and Executive Director of the WKU Foundation from 1998 to 2010. Tom began his career in development in 1985 at DePaul University, held a variety of fundraising positions at the University of Maryland, and served as Director of Campaigns at Rice University.



Orrie Covert
Senior Associate Vice Chancellor for Advancement Constituent Units

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As Senior Associate Vice Chancellor, Orrie oversees the professional fundraising staff for the schools and colleges, intercollegiate athletics, and health systems, directing the planning and execution of a coordinated fundraising program. Orrie also advises the Vice Chancellor on fundraising goals, plans, strategies, and resource allocation.

Prior to coming to MU in April 2013, Orrie served as the Assistant Vice President for Development at the University of Florida in Gainesville. He was Vice President for University Advancement and Executive Director for the Northwest Foundation at Northwest Missouri State University from 2005 to 2011. Orrie began his development career in 2002 as Director of Development at Syracuse University.



Todd McCubbin
Associate Vice Chancellor for Advancement & Executive
Director of the Mizzou Alumni Association

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Todd McCubbin is the Associate Vice Chancellor for Alumni Relations and Executive Director of the Mizzou Alumni Association. As the chief alumni relations officer at Mizzou, Todd leads the 45,000-member association and the Mizzou Annual Fund. He directs a staff of 30 and works closely with the association's governing board of directors. Todd joined the MAA staff in 1995 as a Coordinator of Alumni Relations.



Wayne Chipman
Assistant Vice Chancellor for
Advancement — University Programs

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The Assistant Vice Chancellor for Advancement - University Programs oversees the operation of central fundraising operations, including Gift Planning, Endowments, Regional Programs, International Advancement, Graduate Studies, Honors College Advancement, and Corporate and Foundation Relations. Wayne also serves as the University liaison to affiliated foundations.

Prior to coming to MU in 2003, Wayne served as the Director for Major and Planned Gifts at Truman State University in Kirksville, Missouri. He also was a Director of Development at Drury University in Springfield, Missouri, from 1997 to 2001. Wayne practiced law and worked in economic development prior to joining the development staff at Drury.



Ron Kelley
Assistant Vice Chancellor for Advancement — Principal
Gifts, Stewardship, and Creative Services

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Ron is responsible for the stewardship of MU's most prolific donors. Ron provides leadership for stewardship, creative services, and the fundraising program for the Mizzou Advantage.

This is Ron's second stint at MU. Prior to coming back to MU in 2006, Ron served as Director of Corporate and Foundation Relations at Miami University of Ohio. Previously, Ron served in a variety of roles at Mizzou – from Advancement to Director of External, Alumni and Student Relations at the School of Journalism, where he also taught in the Broadcast News department.



Paul Ross Assistant Vice Chancellor for Advancement - Health Systems

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Paul works closely with schools, colleges, and units across the health science disciplines. He is responsible for a broad range of development activities, focused primarily on major gifts, leading a high-performing team of fundraisers, and providing strategic direction to his team for the comprehensive campaign.

Prior to joining Mizzou, Paul held leadership roles in the nonprofit and for-profit sectors. Most recently, he was Director of Major and Planned Giving for the University of Wisconsin-Milwaukee. Paul also has been a

Senior Director of Development with the University of Florida and a Principal Gift Officer with Mayo Clinic.

Passionate about education, Paul has served as an adjunct professor for Cardinal Stritch University (CSU) and adjunct professor for University of Wisconsin's Helen Bader Institute for Nonprofit Management.

Paul received his undergraduate degree in business from CSU in Milwaukee, Wisconsin, and went on to earn a Master of Business Administration degree from Marquette University's Graduate School of Business. Paul also has completed leadership training at the renowned Center for Creative Leadership.

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Gina Sholtis
Assistant Vice Chancellor for Advancement - Constituent Units

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As Assistant Vice Chancellor, Gina is responsible for a broad range of development activities, focused primarily on acquiring major gifts, leading a talented team of fundraisers across campus, and providing strategic support for the comprehensive campaign. Gina also interacts with deans, university leadership, campaign volunteers, and alumni to build strong relationships among MU's constituencies.

Previously, Gina led the development efforts for the School of Law at Washington University in St Louis. She also has served as the Assistant Dean for Development and Alumni Relations at the Saint Louis University School of Law.



Shannon Tindall-Jarnegan Assistant Vice Chancellor for Advancement Services

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As the Assistant Vice Chancellor for Advancement Services, Shannon is responsible for administering and maintaining the structure of the University of Missouri's Advancement operations. Shannon and her team gather, establish, manage, and distribute information to guide the division's progress and overall business decisions. They establish principles, maintain guidelines, and investigate technical and financial solutions to reduce risk and maximize philanthropic investment in MU.

Areas of responsibility include: Division Budget and Finance; Advancement Compliance and Auditing; Database Management and Reporting; Advancement Records Management; Organizational and Professional Development; Personnel Management/Payroll; Prospect Research; and the Technical and Informational Support Group.

Shannon has served in a number of roles within Advancement during her 14 years at the University. Prior to her current role, she served as Executive Director of Budget, Finance, and Employee Relations. Shannon received her undergraduate degree in Business with triple emphases in Management, Accounting, and Finance from Columbia College and went on to earn a Master of Public Administration degree with an emphasis in Public Policy from the University of Missouri's Truman School of Public Affairs.



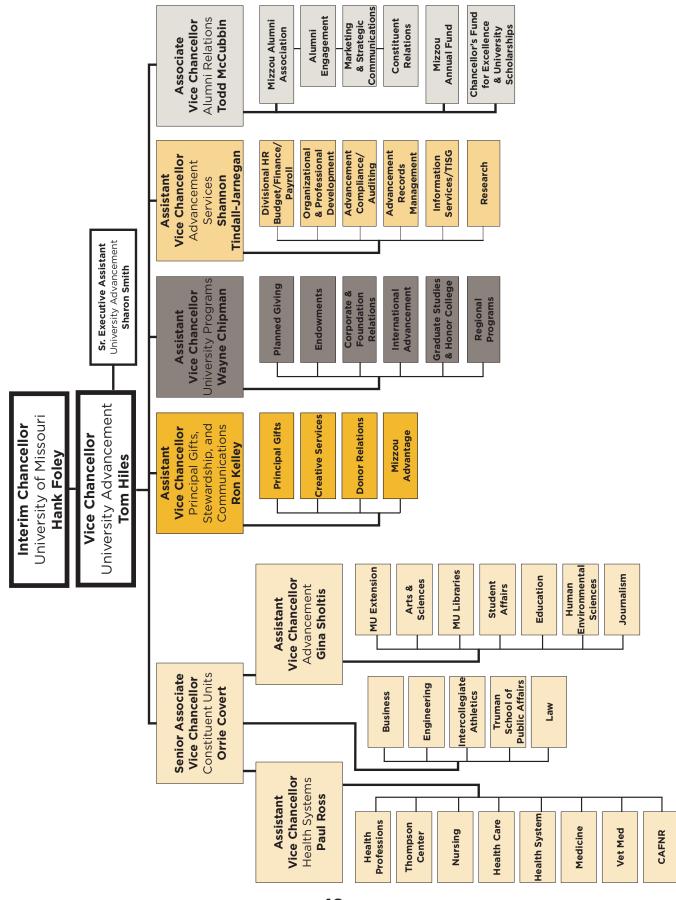
Deb Snellen
Director of Organizational and Professional Development

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Deb is passionate about working to increase the capabilities of Mizzou Advancement staff to shape the future of MU. Her areas of expertise include talent management, performance improvement, learning and development, and organizational development. She leverages these strengths to provide strategic direction and facilitation of initiatives related to staff engagement and communication, strategic and workforce planning, job design, organizational structure and processes, talent acquisition, learning and development, performance management and improvement, career paths, succession planning, and recognition programs.

For 25 years prior to joining MU Advancement, Deb owned a nationally known consulting firm specializing in training and development options for improving organizational performance. She also was a member of the faculty for the U.S. Chamber of Commerce's Institute for Organization Management. Deb has published more than 100 articles on leadership and management.

Deb received a bachelor's degree in Education and a master's degree in Communication with an emphasis in Organizational Communication and Training from Mizzou. She is a Past President of the Mizzou Alumni Association and a former Tiger mascot.



Advancement - The Office of Advancement seeks to encourage philanthropic support of Mizzou by matching donor passions with university priorities.

Alumni - Graduates or former students of the University of Missouri.

Annual Giving - The Annual Giving program exists to provide the University of Missouri with financial support for scholarships, special programs, research facility, technological upgrades, and other needs.

Association of American Universities - The Association of American Universities (AAU) comprises 62 leading public and private research universities in the United States and Canada. Founded in 1900 to advance the international standing of U.S. research universities, the AAU today focuses on issues that are important to research-intensive universities, such as funding for research, research policy issues and graduate and undergraduate education.

Beneficiary - The person and/or organization that receives the benefits (usually assets or income) of a will, trust, IRA, life insurance, etc.

Beneficiary Designation - Clearly identifies how specific assets will be distributed after your lifetime.

Bequest - A gift of property or assets to a beneficiary as defined in a will.

Campaign Cabinet - The Campaign Cabinet, in collaboration with the Mizzou Office of Advancement, is responsible for the direction of the *Mizzou: Our Time to Lead* campaign.

Campus Renaissance - One of three priorities for the *Mizzou: Our Time to Lead* comprehensive campaign, with a focus on new and renovated buildings to make Mizzou a better place to live and learn.

Cash gift - A gift made most often by check or credit card (rarely cash).

Chancellor's Fund for Excellence - Mizzou's campus-wide unrestricted gift fund (est. 2001) to allow campus leadership to address unforeseen challenges and unexpected opportunities

Charitable gift annuity - A charitable gift annuity (CGA) is a simple contractual agreement between MU and a donor who gives a minimum of \$10,000 in cash or securities to the University in exchange for regular fixed-amount payments over a period measured by one or two lives. The contract directs the use of the remainder based on the donor's original instructions.

Donor advised fund - a charitable giving vehicle administered by a third party, such as a community foundation, and created for the purpose of managing charitable donations on behalf of an organization, family, or individual.

Endowed faculty positions - Faculty positions permanently funded by endowments created specifically for that purpose. A variety of funding levels are available (including faculty scholar, professorship, distinguished professorship, chair, and endowed chair). Endowed faculty positions help Mizzou attract and retain top talent.

Endowment - A fund or collection of funds that produces expendable annual distributions for MU. Endowments are important to MU because they create ongoing sources of income independent of state support and changes in the economic climate.

Expendable fund - A fund from which all monies may be drawn for current use.

Faculty Scholar - An endowed faculty position typically awarded to accomplished early-career researchers.

Fellowship - Financial support for a graduate student to pursue his or her degree with no associated teaching or research duties.

Graduate assistant - a person who serves in a support role (assistantship) at a university, usually while completing post-graduate education. The individual typically assists professors with instructional responsibilities as teaching assistants or with academic research responsibilities as research assistants, aids coaches with an athletic team, or is employed by other university departments (such as housing or academic advising) in an entry-level capacity.

Honorarium - Any gift made in recognition or in honor of an individual or other entity.

In-Kind Gift - A charitable gift of goods or services rather than money.

Leadership/Major/Principal gifts - a principal gift is an extraordinary commitment of \$1 million or more

Matching Gifts - A charitable practice in which an individual, organization, or government entity pledges to match donations made by other donors. Many companies encourage their employees to make charitable contributions by matching their donations, increasing the impact of their employees' philanthropic support.

Memorial - Any gift made in someone's memory.

Mizzou Advantage - The Mizzou Advantage initiative fosters interdisciplinary collaboration among faculty, staff, students and external partners to address and solve real-world needs and problems in four areas of strength identified at the University of Missouri: Food for the Future, Media of the Future, One Health/One Medicine, and Sustainable Energy

Mizzou Give Direct - Mizzou's online crowdfunding solution. (https://donatetomu.missouri.edu/givedirect/)

Mizzou Student Foundation (MSF) - MSF is a student organization dedicated to educating others about how charitable giving enhances the student experience.

Payroll deduction - a method of giving where a designated amount is donated from your paycheck each month.

Planned giving - Any type of donation that requires planning to accomplish and often defers transfer to the future. Typical planned gifts include bequests through a will, assets given through a revocable living trust, beneficiary designations of retirement accounts, other financial accounts and life insurance policies, and life income arrangements such as charitable gift annuities. Planned gifts can also include outright gifts of

securities, real estate, and other property that require assistance of advisors and acceptance by the University.

Pledge - a promise to make a gift to the University at a future time.

Primary gift credit - Tax credit, also known as "hard credit," assigned only to the legal donor.

Regional Programs - Representatives of the Regional Programs advancement staff travel across the nation to help alumni and friends connect with Mizzou wherever they live.

Restricted gift - Gifts made to MU to be used in accordance with donor-created guidelines.

Scholarship - Financial aid awarded to a student. Criteria can include academic achievement, financial need, field of study, student demographics, and more.

Signature Centers and Institutes - One of three areas of emphasis for the *Mizzou: Our Time to Lead* campaign focusing on centers of excellence that will position MU at the forefront of research and education.

Signature hires - Key hires made by the Chancellor to further our mission.

Tiger Scholarship Fund - A fundraising program within the Department of Intercollegiate Athletics.

Total gift credit - Total gift credit includes assigned gift credit beyond the donor record. Includes gifts-in-kind, matching gifts, and other "soft credit."

Unrestricted gift - Gifts made to MU with no limitations on how the gift is to be used.