Thank You

As donors and friends of the University of West Florida, you have helped the UWF Foundation change the lives of 900 student scholars with more than $1.2 million in scholarship support this fiscal year.
The University of West Florida continues to thrive as we move forward with the successful implementation of the 2012-2017 Strategic Plan. While the foundation of our success is clearly attributed to our centralized focus on the achievements of our students, we also remain committed to quality teaching and research, maintaining a culture of excellence and creating mutually beneficial partnerships. However, none of this would be possible without the generosity and commitment of the University’s alumni, donors and friends.

The look ahead for this coming year’s institutional endeavors is even brighter than the last, as we continue to lead the way into new territory. In the coming months, a primary focus will be placed on West Florida Historic Preservation, Inc., a direct support organization of the University. This next phase in the organization’s history began in September, with the announcement of a new name for the organization, UWF Historic Trust. Our updated moniker was selected as the result of an extensive research process and symbolizes not only the attachment to the University, but also a relationship between the organization and the historic assets with which it is entrusted.

The UWF Historic Trust assets provide groundbreaking ways to support the University’s core academic mission while serving as a conduit to create mutually beneficial partnerships that pave the way for economic development and enhanced quality of life for our students, faculty, staff and the community.

In addition to the academic and community engagement advances due to our enhanced downtown presence, Provost Martha Saunders recently launched a revolutionary new entity focused on enriching the local community, state and region through academic partnerships. Aptly named Innovation Institute, this new entity serves as a conduit by bringing together University resources in order to respond to various community needs and challenges through high-demand collaborative projects.

Not only are we blazing trails with our scholastic endeavors, we are also continuing to enrich our student life experience as we gear up to begin football in 2016. This spring, we will begin the search process for hiring a head coach and in Fall 2015, we will enroll our first class of recruits for practices and scrimmages. Our collaboration with the Community Maritime Park Association will allow UWF to kick-off for the first time in downtown Pensacola and offer a truly one-of-a-kind game day experience.

Without question, the future of UWF is filled with potential. The momentum we’ve gained over the previous few years is exciting and sets the stage beautifully as we approach the University’s 50th anniversary in 2017. I know that we can count on your dedication, support and enthusiasm for the University of West Florida. Go Argos!

Sincerely,

Judith A. Bense, Ph.D.
President

As Interim Vice President of University Advancement and Executive Director of the UWF Foundation, we are honored to have this opportunity to thank the many friends, alumni, faculty and staff that supported UWF during fiscal year 2012-13. We continue to be inspired by our donors for the reasons you give to our university. Additionally, we are humbled by the incredible impact this financial support has on our students as they pursue their academic dreams.

The energy on campus is one of excitement and hope driven by UWF’s vision for the future. At the core of UWF’s strategic plan is student success. To help ensure that success, we are committed to teaching and research activities that deliver an optimal mix of high-quality programs to meet regional and state needs. We continue to form and further our community and alumni partnerships that will cultivate opportunities for student learning and also contribute to the economic development in our local area, state and region. With your support, UWF is creating a culture of excellence.

Our students have high expectations for the future, in part, because you have given them the opportunity to break barriers and transform lives. We pride ourselves in being a good steward of your investment and your belief in the mission and the students of UWF. The Division of University Advancement, the UWF Foundation, its Board of Directors and staff are dedicated to safeguarding and maximizing your gifts to the university.

We are in the midst of exciting times at the University of West Florida, and looking forward to the 50th anniversary of UWF in 2017. As our institution grows, we must continue to raise the level of philanthropic support needed to impact future generations. Our legacy is to ensure that financial barriers do not impede educational opportunities.

Thank you for being a part of UWF’s transformational journey.

Warm regards,

Dr. Brendan Kelly
Interim Vice President, University Advancement

Sheri Pope
Executive Director, UWF Foundation
Alumna Honors Fellow Teachers with Gift

UWF alumna Pamela Bowen Schwartz recently established a scholarship endowment to commemorate the 60th anniversary of Florida Alpha Delta Kappa, an international organization of outstanding women educators promoting excellence in education, altruism and world understanding.

As stated in her remarks, “Alpha Delta Kappa purposes will always be true. Teachers connecting schools to community, our pledge renew. Continuing our founder’s vision with learning lifelong, with love, service and friendship we will keep our bonds strong.” In addition to honoring her organization, Pam also wished to pay tribute to the teachers, mentors and scholars that have enabled her to live the American dream.

Schwartz received a bachelor’s degree in Elementary Education in 1969 and a master’s degree in Reading Education in 1978 from UWF. Throughout her 30 years of service to the Escambia School District, Schwartz has received various honors, including being recognized in Who’s Who Among America’s Teachers. Since retiring in 2002, she has been actively involved with Alpha Chapter and Florida Alpha Delta Kappa, as well as community organizations advocating for children, public education and the arts.

Florida Blue Foundation Contributes $100,000

With a history of generous scholarship and program support for the UWF Nursing undergraduate and graduate programs, the Florida Blue Foundation (BCBS) has established a new endowment at UWF. The Florida Blue Foundation endowment will provide for need and performance-based scholarships, program support and potential internships in the areas of nursing, clinical lab sciences, medical informatics, public health and pre-professional health programs. In addition, this endowment will help defray costs normally borne by the students through course fees to cover the costs of materials, equipment and supplies required for conduct of laboratory and lecture sections in the health sciences.

This gift, along with support from the Florida Blue Foundation over the last decade, represents more than $180,000 given to the Nursing Program and other health-related programs. Florida Blue has truly impacted the program development and education of Northwest Florida’s healthcare professionals and is transforming lives at the University.

Building a Solid Future for UWF Students

Over the past several years, Nathan Green, president of Green-Simmons Construction, Inc., has made significant contributions to the UWF Building Construction Program. Whether Green is chairing the advisory council, hiring interns, employing alumni or providing philanthropic support for scholarships and special initiatives, he continues to support UWF and its students by providing opportunities that will prepare them for future success. Recently, Green agreed to spearhead the Community Outreach Research and Education Initiative (C.O.R.E.) and made a gift of $35,000. More than 35 organizations, including Gulf Power and Webb Electric of Florida Inc. have joined him with their contributions.

Once completed, the C.O.R.E. Initiative will promote energy efficient construction through the innovative display of cutting-edge technology and offer unique community outreach opportunities. Features of the multi-faceted building will include a soils laboratory, an energy efficiency demonstration and exhibition area, a construction yard and an outdoor amphitheater, which will enhance students’ learning outcomes. For additional information about the C.O.R.E. Initiative, visit uwf.edu/core.

UWF and Gulf Power to Develop Downtown Multicultural Resource Center

This May, the University partnered with Gulf Power and UWF Historic Trust, formerly West Florida Historic Preservation Inc., to unveil plans to transform the Beacon Building into “The Voices of Pensacola,” a multicultural resource center highlighting the city’s diverse history. Gulf Power and Southern Company donated $605,000 to UWF Historic Trust for this initiative.

The new center will feature displays representing the varied cultural groups who have shaped Pensacola’s history. It will also include: two stages for oral history, storytelling and musical performances; two acoustically controlled aural exhibit spaces where oral histories can be heard and recorded; a research room; computer research stations and more.

UWF Historic Trust owns the Beacon Building, formally known as the Norman Simons Building, located at 110 Church St. in downtown Pensacola. Since it was built in 1912, the Beacon Building has housed several wholesale grocers, wholesale liquor companies and the Pensacola Cigar and Tobacco Co.
Innisfree Hotels Founders Pledge $250,000 to UWF Hospitality Program

Thanks to the generous gift commitment of $250,000 from Julian and Kim MacQueen, the University plans to rename its Hospitality, Recreation and Resort Management Program in their honor. This marks the first named academic program in the institution’s history.

The MacQueens are founders of Innisfree Hotels, which owns and operates six beachfront hotels and resorts in the Gulf Coast region of Florida and Alabama, as well as several limited service properties in the southeast United States. In April 2014, they are opening another Holiday Inn Resort in Ft. Walton Beach. The company embodies a top-down approach of fostering a workplace environment that promotes both responsibility and service to humanity. “At Innisfree, we live and breathe our core principles, and believe that if you give people purpose, they’ll do a whole lot with it,” said Julian MacQueen.

This mutually beneficial partnership will enable UWF hospitality students to participate in onsite training, internships and field experiences at Innisfree properties located along the Gulf Coast in Florida and Alabama. In turn, Innisfree will benefit from having a future workforce locally trained and integrated within the corporate culture. The partnership will also allow UWF to develop a more unified hospitality curriculum, designed to address current, identified industry needs.

There are currently more than 200 students enrolled in the Hospitality, Recreation and Resort Management program. For additional information about the Innisfree Hospitality and Resort Management program, visit uwf.edu/hles/hospitality.cfm.

Donor Moved by Biomechanics Lab

Donor Hal Marcus is no stranger to UWF. He’s been a long-time supporter of the University and its commitment to enhancing research, instruction and the quality of life of the Northwest Florida area.

Through his continued support of the University, Marcus came across the Biomechanics Laboratory in the Health, Leisure and Exercise Science Department at UWF and professor Dr. Eric Greska, who spearheads the lab. After touring the facility, Marcus was so impressed that he gifted $50,000 for the addition of 10 high-speed motion capture cameras and the related biomechanical software, further enhancing the lab’s capabilities.

As a result of Marcus’ gift, the newly outfitted laboratory boasts industry-leading technology, enhancing education within the program as well as the regional outreach supported by UWF. The lab’s equipment allows UWF students and researchers the ability to view and analyze discrete human movement. Students work directly with the equipment as a hands-on approach to understanding normal human movement. “As a UWF alumnus, I think about the valuable hands-on experience I received throughout my education,” said Greska. “This is another way for UWF students to have the ability to learn real-world experiences in the classroom.”

Marcus hopes his passion for the lab will continue to enhance students’ educational experience and serve as a catalyst for those throughout the Northwest Florida community to continue to utilize and fund the lab.

“At Innisfree, we live and breathe our core principles, and believe that if you give people purpose, they’ll do a whole lot with it.”
—Julian MacQueen, Innisfree Hotels Founder

“...I think about the valuable hands-on experience I received throughout my education. This is another way for UWF students to have the ability to learn real-world experiences in the classroom.”
—Dr. Eric Greska
Argonaut Athletic Club
It was another record-breaking year for Argonaut Athletics. The Argos continue to excel on the field and in the classroom, exemplifying the great support they receive from the UWF community. Here are some of the great things UWF Athletics accomplished this past year.

- Women’s Soccer won the 2013 NCAA D-II National Championship.
- UWF won seven Gulf South Conference Championships, setting a GSC record.
- UWF through the total GSC titles up to 71, setting a GSC record.
- Argonaut student-athletes had a higher average GPA than the UWF student body for the 19th consecutive year.
- UWF had an all-time high of more than 700 members participating in the Argonaut Athletic Club booster organization.
- Argonaut Athletic Club members donated an all-time high of more than $300,000 to UWF Athletics.

ATHLETIC ACHIEVEMENTS

WITHIN FISCAL YEAR 2013

722
Members of Argo Athletic Club

$301,436
Gifts to Athletics

Inaugural Sword & Shield Council Members*: Joe Ambersley, Terry Berling, Sandy Sansing, Gordon Sprague and John Switzer

*One member wishes to remain anonymous.

Steven Garst Memorial Men’s Cross Country Scholarship Endowment
This is the first endowed scholarship supporting UWF men’s cross country and was created to name a scholarship in honor of Steven’s memory. This scholarship recognizes and encourages well-rounded student-athletes who share the tremendous joy he found in the sport.

W. H. “Hendy” Hilton-Green UWF Golf Scholarship Endowment
The W. H. “Hendy” Hilton-Green UWF Golf Scholarship Endowment has been established to honor the legacy of one of Pensacola’s golf legends. Hendy was a leader within Pensacola’s golfing community and won many of the local tournaments. The goal is to raise more money to increase the endowment fund, which would further the impact of the scholarship on our student athletes who participate on the UWF Men and Women’s Golf Teams.

The University of West Florida NCAA Division II Women’s Soccer Team defeated UC San Diego 1–0 to win its first national championship in program history on December 1, 2012.
Financial Information

The UF Foundation exists to encourage, manage and administer private resources to support the mission and priorities of the University of West Florida, as established by the Board of Trustees and the president of the University of West Florida. The foundation is dedicated to assisting the university through building the endowment, currently valued at $54.3 million. Through private financial support, foundation resources support long-term academic and other priorities of the University, providing opportunities for students and affording a margin of institutional excellence unavailable with state funds.

Investment Philosophy — Asset Allocation and Style Diversification

Research suggests that the decision to allocate total assets among various asset classes will far outweigh security selection and other decisions that impact portfolio performance. The Investment Committee recognizes the strategic importance of asset allocation and style diversification in the investment performance of the assets over long periods of time. Domestic and international equities, both large and small capitalization, fixed income, cash equivalent securities, real estate, private equity, and fund of funds hedge funds, in the form of diversified fund of funds, have been determined to be acceptable vehicles for these assets. Additional asset classes and style strategies may be incorporated into the investment philosophy in the future.

Investment Objective

The objectives of the assets are the enhancement of capital and real purchasing power while limiting exposure to risk of loss. Real purchasing power or real rate of return will be defined as returns in excess of inflation as defined by Consumer Price Index. At a minimum, long-term rates of return should be equal to an amount sufficient to maintain the purchasing power of these assets and provide necessary capital to fund the Foundation’s spending policy. As such, the desired minimum rate of return is equal to the Consumer Price Index (CPI) plus 400 basis points (4%) for spending, plus an additional 200 basis point (2%) on an annualized basis. Bottom line, the overall minimum rate of return is equal to CPI plus 600 basis points (6%).

In light of this return requirement, the portfolio should be constructed using a total return approach with a significant portion of the funds invested to seek growth of principal over time. The assets are to be invested for the long term, and a higher short-term volatility in these assets is to be expected and accepted.

Spending Policy

The foundation takes seriously its responsibility to provide prudent fiduciary management, oversight of the endowments and intergenerational equity. To this end, the Foundation utilizes a one-year waiting period before awarding spending and a step-down spending allocation method should an endowment fall underwater. Through utilization of a well diversified investment portfolio strategy, prudent spending allocation policy, and the best good faith effort of its board members, the Foundation attempts to continue to provide spending to support the scholarships, programs, and faculty as designated by the donor while preserving over time the donor’s gifts to the endowment corpus. Further details on the investment policy are available at the Foundation’s website uwf.edu/foundation.

Investment Returns

- Investment Portfolio
- Balanced Index
- 70% S&P 500
- 30% Barclays Aggregate
- CPI Plus Spending and Budget (CPI+6%)
Donor Bill of Rights

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 ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the nonprofit organizations and causes they are asked to support, we declare that all donors have these rights:

1. 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.

2. 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.

3. To have access to the organization’s most recent financial statements.

4. To be assured their gifts will be used for the purposes for which they were given.

5. To receive appropriate acknowledgment and recognition.

6. To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.

7. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.

8. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.

9. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.

10. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

The text of the above statement in its entirety was developed by the American Association of Fund-Raising Counsel (AAFRC), Association for Healthcare Philanthropy (AHP), Council for Advancement and Support of Education (CASE), and the Association of Fundraising Professionals (AFP), and adopted in November 1993.

Legacy Giving

Gordon Sprague—Setting an Example of Community Leadership

Gordon and Bette Sprague’s relationship with the University was first established many years ago, but it continues to grow and evolve today. They first became involved with the university by supporting the UWF Tennis Program. It wasn’t until they met President Judy Bense years later that a deeper connection with the University began to form.

The Spragues have now expanded their involvement with UWF. Gordon currently serves on the UWF Foundation Board and has taken an active role in the growth of the UWF Athletics program. An avid fan, Gordon fully supports the potential expansion of the UWF Intercollegiate Athletic program to include football. He serves on the UWF Athletics Sword & Shield Council and is leading the charge for the implementation of football as an intercollegiate sport. By serving as the chair of the UWF Football Founders group, he is committed to helping raise funds to start football at UWF.

As part of that commitment, Gordon and Bette have included the University in their estate plan. They made the decision to support UWF during their lifetime and into the future. Their gift will make a difference for years to come and will leave a legacy that will live on.

The University of West Florida Board of Trustees passed a resolution of support in its meeting on Friday, September 20, 2013 for the UWF football team to begin playing in Fall 2016.

Donors

Mr. Keldrick Averhart
SGA Representative

Mrs. Laverne Baker
Dr. Judy Bense

Mr. David Cleveland
BOT Representative

Ms. Patricia Denkler
Past President

Mr. Doug Dobson
Mr. Jim Donatelli

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