

# MARTIN-GATTON CAFE

## ADMINISTRATIVE USERS' GROUP

February 11th, 2025

Rescheduled 2/24

9:30-11:00am ET

Location: Zoom

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### FOLLOW-UP NOTES

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#### 1. Budget & Finance

##### a. FY26 Budget Process (Susan/Jason)

- i. **Income Estimates** - The first of March, we will begin working on income account revenue estimates. We will send an email to business officers with detailed instructions on how to enter estimates.  
If you know your estimates will be changing more than 10% from last year, please provide a note as to why on the estimate spreadsheet. We will be able to assist during this process as needed.
- ii. **Restricted Estimates** – Around mid-March, we will receive information from the Provost Budget Office regarding gift and endowment spending distribution revenue estimates. We will send this information out to department business officers and ask you to enter estimates for your department.
- iii. **FY25 Fund Balance Estimates** – We will request projected FY25 fund balances at the end of March from Chairs and business officers. A request must be made to receive fund balance back.

##### b. University Fee Calculation QRG (Christie)

- i. We have created a new tool to help determine the cost of strategic service fees and waste disposal fees on expenses. This helps when you have an account with a small balance to spend down. University fees must be considered to prevent the account from being overspent.
- ii. Here is a link to the Purchasing FAQ's and QRG page:  
<https://cafebusinesscenter.ca.uky.edu/content/purchasing-faqs-abd-quick-reference-guides>

##### c. Sponsored Programs (Angela)

- i. **Grant Cost Distributions:** Cost distributions on FCGs should go out until the end of the federal fiscal year, 9/30/25. This will allow us to get more accurate balance projections. Cost distributions on OSPA grant should go out until the end of the budget period.
- ii. **Tuition Costs:** Should be posted to grant accounts by the end of March. Be sure to check the accounts for charges to ensure they are charging the correct accounts and check the overrun account to make sure tuition did not hit there. Cost distribution must be from January- March 17<sup>th</sup>. Ensure OSPA grant budgets have funding for tuition in the appropriate sponsored class. If not, these expenses will charge to your overrun and corrections will need to be made.
- iii. **OSPA Grant JVs** - CGS is to complete all JVs on grants **except for** service centers, equipment, or fuel JVs. This does not include cost share on 1\* accounts. All JVs need to go through departmental analyst for approval. Reach out to Angela when needed for issues with CGS or OSPA.
- iv. **Cost Share Fund Center Elimination** - RFS sent an email explaining that they are no longer creating unique cost share accounts. This is a back-end process that will

**\*\*NEXT MEETING: Tuesday, May 13<sup>th</sup> @ 9:00am Eastern via Zoom\*\***

primarily affect RFS. Reminder that if you have cost share for employees in a different department, you may need to reach out to them to get a cost center and make sure you are moving other department cost share to them from your cost share 1 account. See the presentation slides [here](#).

## 2. HR & Payroll

### a. Staff Performance Evaluation Update (Le Anne)

- i. This is the last week for staff evaluations. 99% have submitted at least their self-evaluation. Supervisors will need to finalize the process by March 1st. Please ask us questions any time in the process.

Find resources here:

<https://cafebussnesscenter.ca.uky.edu/sites/cafebussnesscenter.ca.uky.edu/files/2024%20Timeline%20%26%20Resourcesb.pdf>

### b. Important Dates (Le Anne)

- i. If you do HR functions for your dept, please come to the HR Huddle. Make sure to register and bring others who could benefit. Can attend by zoom if you need to due to your location.
- ii. HR Huddle – sign up form for 3/19 Huddle:

[https://uky.az1.qualtrics.com/jfe/form/SV\\_2fSNjaMU597dq4m](https://uky.az1.qualtrics.com/jfe/form/SV_2fSNjaMU597dq4m)

### c. College Resources

- i. CSA Enrollment and vouchers – UK pays towards the program:  
<https://hr.uky.edu/csa-voucher-program>
- ii. Visit the Arboretum: <https://arboretum.ca.uky.edu/events-programs>
- iii. Work- Life Events: [Human Resources](#)
- iv. Reminder that the college pays for up to \$1,000 per year, per person for professional development activities: [Staff Professional Development Fund | M-G CAFE Business Center](#)

### d. Student/Internships Job Fair (Le Anne)

- i. HR will be representing our college at the Spring 2025 Internship & Career Fair, held February 26<sup>th</sup>, 2025

### e. Service Award Delivery (Le Anne)

- i. Service Awards are given for 5 year marks of employment. Thanks for helping us get the last orders in and the awards and gifts will be coming in soon. Please make the award delivery to your staff special in your dept's own way.

### f. Student Hiring Demo (Maggie)

- i. A few departments have sent in postings to present at the Fair so please send in your needs. Link to the post location: [https://jobs.ca.uky.edu/Student Job Openings | Job Opportunities](https://jobs.ca.uky.edu/Student%20Job%20Openings%20|%20Job%20Opportunities)  
Setting up for success with hiring starts with the job posting.

See HR slides [here](#).

## 3. Other

### a. Follow up on building moves (Tom Hanna)

As noted on the User Group meeting agenda Monday, the website of resources to prepare for the building moves in 2026 has been launched. Department chairs are aware of this effort and will be helping us coordinate communication this year.

<https://research.ca.uky.edu/preparing-building-moves>

**\*\*NEXT MEETING: Tuesday, May 13<sup>th</sup> @ 9:00am Eastern via Zoom\*\***

If your department is in Garrigus, Ag North, or the adjacent greenhouses, it's not too soon to start going through offices, files, labs, and storage! The FEPP process, in particular, takes several weeks, often months, to return items to the federal property pool. FEPP items that are consumed or eligible for destruction or disposal still require federal approval. Each department chair will soon get an inventory of FEPP items in these buildings for processing.

**Note** there is a checklist document link (PDF) at the top of this new webpage. Please bookmark and check back as this website evolves. Let me know if you have any suggestions or questions.

**b. Welcome and Congratulations to New Staff Members in M-G CAFE!**

- i. Abigail Shepherd - hired fulltime in DHN
- ii. Samantha Shoulders - new admin assist in WKY
- iii. Julie Tolliver - transitioning from BAE to NIOSH
- iv. Melissa Feddes - transferring to BAE from Extension March 9th
- v. [Edit: Jessica Storey began as new business officer for 4-H 2/17](#)

**4. Optional Philanthropy presentation (Tressa Neal and Erin DesNoyers)**

Overview of Philanthropic gifts, ways to care for these funds. Presentation slides following Finance and HR below [here](#).

**Your input is valued!**

**If you have fellow employees, you would like to add to this meeting invite list or if you have any requests/questions you would like to see answered in future meetings, please send those to Ginny Huntress ([ginny.huntress@uky.edu](mailto:ginny.huntress@uky.edu)).**

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# MARTIN-GATTON CAFE ADMINISTRATIVE USERS' GROUP

## SPONSORED PROGRAMS

February 24, 2025



**Martin-Gatton**  
College of Agriculture,  
Food and Environment  
University of Kentucky.

**M-G CAFE Business Center**

# Cost Distribution

- FCG cost distribution should be going entered through 9/30/25 and OSPA grants cost distribution should be going out to the end date of the budget period listed on the PADR.



See PADR-at-a-Glance for how to use your PADR.

8/23/2021      PADR #: 1      Office of Sponsored Projects Administration Project Account Data Record

**PADR Information**

1	Account	32XXXXXXXXX Awarded		8	Project Title	Project Title
2	MIS#	202006190830		9	CFDA	93.866
3	Research Administrator	RA Name RA-email@uky.edu XXX-XXXX	↑	10	Sponsor	<b>Name:</b> Sponsor Name <b>Number:</b> Sponsor Number
4	Financial Administrator	FA Name FA-email@uky.edu XXX-XXXX		11	Project Period	<b>Start Date:</b> 8/19/2019 <b>End Date:</b> 5/31/2022
5	Project History			12	<b>Budget Period</b>	<b>Start Date:</b> 5/5/2021 <b>End Date:</b> 5/31/2022
6	Principal Investigator	PI Name PI Department Department address PI-email@uky.edu	←	13	Account Type	Scope
7	Sponsor ID	2019-1210 3R01AG999999-99S9	←	14	Indirect Cost Information	<b>Overhead Rate:</b> 53.00
				15	Award Type	Cost Reimbursement Subgrant
				16	Responsible Unit	7HXXX Department Name

Co-Investigators

Account # when contacting OSPA or CGO/Analyst

PI (Principal Investigator) as listed on the Internal Approval Form

Project Period is timeframe of project.  
Budget Period is timeframe of current budget.

Award #/Sponsor ID #

# Tuition on Grants

- **January 14, 2025 (start of semester) - March 17, 2025, is the midterm date of the semester.**
- **Student must have effort on the sponsored project no later than the midpoint March 17, 2025, of the semester being charged.**
- **Check OSPA 3\* accounts to insure there is enough funds in the tuition sponsor class E537030 for Bud Rule 4 & 5.**
- **First of April check overrun account to see if any of the tuition charged there and if so, work with CGS to get them moved to the appropriate grant.**



**Martin-Gatton**

College of Agriculture,  
Food and Environment  
University of Kentucky.

**M-G CAFE Business Center**

# CGS – JV's

**CGS is to complete JVs on OSPA Grant except for Service Center, Equipment, Fuel JV's those are still processed with in each department.**

- Any 3\* account JVs should be sent directly to your department's CGS post-award contact which can be found at this link [College of Agriculture, Food & Environment](#), and they will review/process.
- Please send your post-award CGS contact an email explaining the JV need, including the JV explanation form, memo if it is 120 days old, and any pertinent information and who needs to approve from our college (Your Analyst should be listed for approval on all JV's). Business officers can copy Angela or their analyst if needed.
- Reminder for grant JVs 120 days old – approval from Business Officer, Analyst, chair, PI, and Tim West (on behalf of the Dean) is required. Send Tim an email with JV # and reason it is being processed.
- Reminder that this does not include cost share JVs – only JVs involving 3\* grants.

# Cost Share Fund Center Elimination

- Effective immediately, grant accounts created by Research Financial Services will include the default fund center based on sponsored program. We will no longer create a unique fund center for accounts requiring cost share commitments. This change will simplify the creation process and lessen the time and effort needed to complete accounts for use once transmitted to SAP. Current reporting processes support this change as both SAP and Tableau use the fund or fund type for cost share transactions.

**COST SHARING INFORMATION**

**Date** 8/23/2021  
**Account** 32XXXXXXXXX  
**Title** Project Title  
**Sponsor** Name of Sponsor

**PI** UKRF/MIS#  
**Fund** XXXXXXXXXXXX

**PI Name** 202006190830

**This is the cost share fund number.**

The above referenced account has a cost sharing obligation which must be documented in accordance with University of Kentucky Cost Sharing Guidelines. Cost sharing was either committed in the proposed budget or is a result of the actual award totaling less than the proposed budget. Details are outlined below.

This sponsored project includes a requirement to report cost sharing directly to the sponsor.  
 Faculty effort is committed as cost sharing and must be documented through the Faculty Effort System.

**Whether cost share must be reported to the sponsor.**  
**Whether faculty effort is cost shared.**

**Sponsored Project Accounting Reporting Details**

F&A Rate	Base	Func.Area	Is Off Campus	Budget Rule
53.00	4	0220	N	4

**PROPOSED COST SHARING COMMITMENT**

Completed by Office of Sponsored Projects Administration

**This provides details about the type and amount of cost sharing commitments, if any.**

Method	Budget Detail	Percent	Year	Amount	Matching Funds
Total Cost:					
Direct Cost:					

Grant [redacted] [redacted]

Deletion Indicator [redacted] Closed [redacted] Closed

General Data Responsibilities Award Dimensions **Cost Share** Reference Billing Reporting Payment O.

Cost Share Data

Me...	CS Method Text	Repo...	Description	Perc...	Y.	Amount Propos...	Grant	Cost Center	Freq	Amour
FES	FACULTY EFFORT SY...	<input type="checkbox"/>	[redacted] salary over NIH cap	4.00		336.00		101 [redacted]		

# Helpful Links

- Link to [CGS](#) FAQs also has information on it regarding JV's.
- PADR Distribution Update Request - Click [here](#) to add or remove an email address from the Project Account Data Record (PADR) distribution list.
- [OSPA Grant Training Recordings](#)
- [OSPA Grant Training Cost Share, Subcontracts, Effort on Grants](#)
- [OSPA Grant Training PADR, Grants Master Display, BudRule Crosswalk, AVC](#)





M-G CAFE  
**Business Center HR Team**  
AGBusinessCenter@uky.edu

**USERS GROUP – HR TOPICS**



# STAFF PERFORMANCE EVALUATION UPDATE

# STAFF PERFORMANCE EVALUATION UPDATE

- The M-G CAFE PE deadline is coming up on **March 1, 2025**
- Resources are available to both employees and supervisors on our site.
- We will continue to send weekly status reports.



Step 1  
Self Evaluation  
by Jan 10

Step 2  
Supervisor  
Evaluation  
by Jan 31

Step 3  
1:1 Meeting  
by Feb 14

Step 4  
Employee  
Signature  
by Feb 21

Step 5 Supervisor  
Signature  
by March 1

# IMPORTANT EVENT REMINDERS





Human Resources

# HUDDLE

## HR Huddle

March 19<sup>th</sup> @ 10:00 am

Register:



# CSA ENROLLMENT & VOUCHERS



- CSA shareholders purchase a share of a farm's harvest before the season starts and commit to being a shareholder for the entire designated season. In return, shareholders will receive a weekly box or bag of farm vegetables and sometimes fruit and herbs as well.
- The UK HR Health and Wellness CSA Voucher program helps make this choice easier for you! As a participant in this program, employees\* on a health plan receive a \$200 vouchers toward the cost of a CSA share from one of our partner farms.

■ Vouchers:



# VISIT THE ARBORETUM



## Arboretum Bird Walk

 Sat, Mar 1 2025, 9 - 11am

 The Arboretum, State Botanical Garden of Kentucky

Join us for a guided Bird Walk at The Arboretum. This is a free event. Pre-registration is required.

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TERRARIUM WORKSHOPS

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COMPOSTING CLASSES

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BIRD WALKS

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CHILDREN'S GARDEN

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VISIT: [HTTPS://ARBORETUM.CA.UKY.EDU/EVENTS](https://arboretum.ca.uky.edu/events)





## Work-Life Events FEBRUARY 2025

**FEB  
3**

**Virtual parent circles**  
1 - 2 p.m. via Zoom  
*Presenter: Azetta Beatty*

**FEB  
6**

**Building resilient relationships**  
Noon - 1 p.m. via Zoom  
*Presenter: Rhonda Henry*

**FEB  
10**

**General summer camps information session**  
Noon - 1 p.m. via Zoom

**FEB  
11**

**Academic and arts/creative summer camps information session**  
Noon - 1 p.m. via Zoom

**FEB  
12**

**Athletics and equestrian summer camps information session**  
Noon - 1 p.m. via Zoom

**FEB  
13**

**Religion and special needs summer camp information session**  
Noon - 1 p.m. via Zoom

All events are held virtually, except as noted.  
Visit the Work-Life calendar to register.  
[hr.uky.edu/calendar/worklife-wellbeing](https://hr.uky.edu/calendar/worklife-wellbeing)

**FEB  
13**

**How do you know when it's time to consider a care facility**  
Noon - 1 p.m. via Zoom  
*Presenter: Denise Wells*

**FEB  
18, 25**

**"The Gifts of Imperfect Parenting: Raising Children with Courage, Compassion and Connection" book discussion**  
Noon - 1 p.m. via Zoom  
*Presenter: Azetta Beatty*

**FEB  
19**

**Parents "Real Talk" virtual chat**  
8:30-9 a.m. via Zoom  
*Presenter: Azetta Beatty*

**FEB  
19**

**Elder caregivers support group**  
Noon - 1 p.m. via Zoom  
*Presenters: Ann Bassoni*

**FEB  
21**

**Play: Good for them and you**  
Noon - 1 p.m. via Zoom  
*Presenter: Dr. Nathan Wood*

**FEB  
28**

**Virtual parents connection - speed friending**  
Noon - 1 p.m. via Zoom  
*Presenter: Azetta Beatty*



# STAFF PROFESSIONAL DEVELOPMENT FUND

Find out more & access the application:



**Interested in attending a conference or expo? How about getting some extra training or obtaining a certificate? The college is here to help with that!**

## ■ What qualifies?

- Professional development, continuing education, or business procedure training

## ■ Examples:

- Conferences, Expos, Meetings, Trainings/Certificates (Experienced Leader Academy, Certificate in Graphic Design from the Pratt Institute, Automotive Repair Technician Program, etc.)

## ■ Reminders:

- Each professional development must be related to the employee's current job
- The department must cover at least 50% of the expenses
- Requests may not exceed \$1000 in a fiscal year.
- The employee must be in a regular staff position, in M-G CAFE, with an fte of 75% or greater.
- If the employee is participating in the conference as a presenter instead of an attendee, then they are not eligible for the fund.

SERVICE AWARD

Delivery





# STUDENT HIRING



*Wish You Were Here!*

**UK** Martin-Gatton  
College of Agriculture,  
Food and Environment

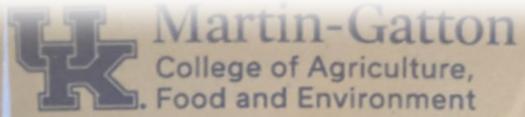


# STUDENT/ INTERNSHIPS JOB FAIR

FEBRUARY 26

GATTON STUDENT CENTER  
BALLROOM & HARRIS BALLROOM

**ANNOUNCING AN EXCITING  
OPPORTUNITY FOR FILLING YOUR  
STUDENT POSITIONS!**



A great place to plant your roots!  
Visit our jobs page today:



[jobs.ca.uky.edu](http://jobs.ca.uky.edu)

**Seed Paper Instructions**  
-Plant in good, loose soil in a sunny location.  
-Keep soil moist.  
-Enjoy watching your seedlings bloom!  
\*Typical germination period can take 1-3 weeks.



# PLANTING A SEED TO REMEMBER US BY...



# WHICH JOB SUMMARY GRABS YOUR ATTENTION?

**A**

## Student Worker

Duties will vary and may include, but not limited to, cleaning, facilities; and operating equipment.

**B**

## Marketing/Communications Student

The department is seeking a creative and motivated student to support its marketing and communications efforts. This role is ideal for a student passionate about digital media, storytelling and event support.

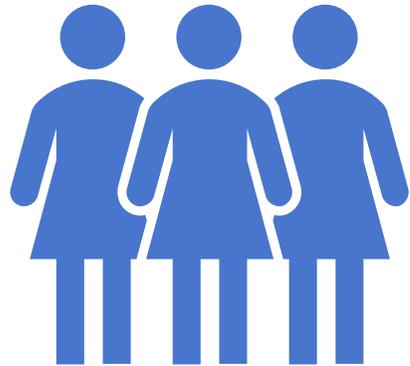
### **Key Responsibilities:**

- Help manage and update the college's website.
- Create engaging graphics and social media content tailored for UKCOP's platforms (Facebook, Instagram, Twitter, and TikTok) to enhance community engagement and awareness.
- Conduct interviews with employees, students, and alumni to develop compelling content for press releases and features.
- Design digital signage content to promote events and news.
- Assist in developing marketing and registration materials for UKCOP-sponsored events.
- Provide hands-on support for major college events, including Homecoming, the Hall of Distinguished Alumni Ceremony, Keeneland Tailgate, and other special events, by helping with setup, teardown, and guest services as needed.

### **Qualifications:**

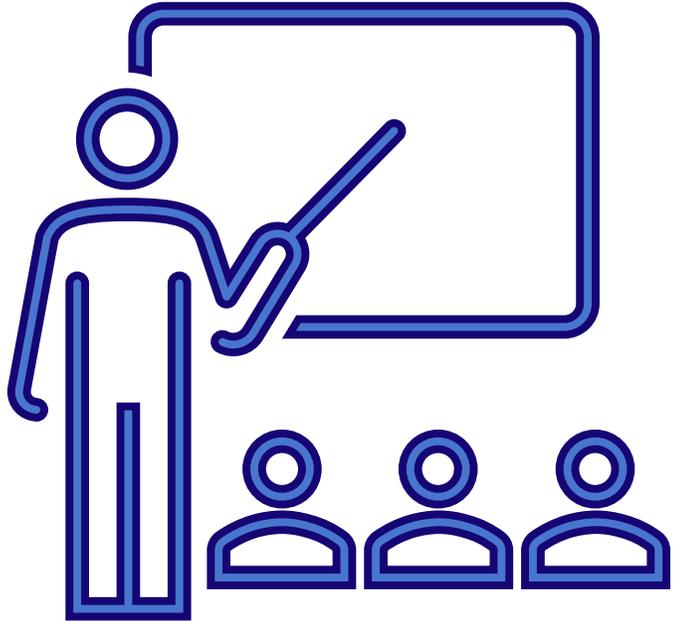
- Must be a currently enrolled student at the University of Kentucky.
  - Strong written and verbal communication skills.
  - Ability to manage multiple projects and meet deadlines in a fast-paced environment.
  - Willingness to support event logistics and interact with guests professionally.
- This position offers a valuable opportunity to gain real-world experience in marketing, communications, and event planning while contributing to the success of UKCOP's outreach efforts.

# GROUP POLL



- WHAT SEASON
- TOTAL NUMBER
- EXPERIENCE

# Demo Time!



- IES – STUDENT JOB POSTINGS

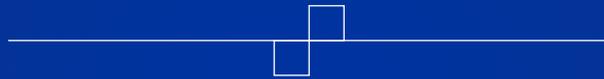


QUESTIONS?

# M-G CAFE Departments with Endowed Funds

- Agricultural Economics
- Animal and Food Sciences
- Arboretum
- Biosystems and Agricultural Engineering
- Center for Student Success
- Community Leadership and Development
- Dietetics and Human Nutrition
- Entomology
- Family and Consumer Sciences
- Food Connection
- Forestry and Natural Resources
- Horticulture
- Landscape Architecture
- Plant and Soil Sciences
- Research Office
- Retailing and Tourism Management
- Veterinary Sciences
- Veterinary Diagnostic Laboratory

# Philanthropy Endowment Discussion



February 2025

Martin-Gatton College of Agriculture, Food and Environment

# M-G CAFE Philanthropy Stewardship



Tressa Neal  
Sr. Director of Donor Relations



Erin DesNoyers  
Director of Donor Relations

# Overview of Philanthropic Gifts at UK

Non-Endowed Gifts	Endowed Gifts
Do not always require formal agreements	Require a formal agreement between the University and the donor
No minimum donor contribution	Minimum donor contribution levels- <a href="#">AR 8:4</a>
Deposited in gift cost centers (1215* in SAP)	Deposited in an endowment fund (07* in SAP) and invested
Flexibility for current use that aligns with donor requirements	Expenses related to donor's purpose are posted to endowment's spending distribution cost center (1215* in SAP)- delayed one year from date of first deposit
"Checking accounts"	Provide a distribution in perpetuity

# Overview of Philanthropic Gifts at UK

## Both Non-Endowed and Endowed Gifts

Must be spent in accordance with donor intent

Donors cannot determine the actual expenses

All formal agreements are signed by the donor and representatives of the University

# Division of Duties

UK Central Philanthropy	University Financial Service	MG-CAFE Philanthropy Office	MG-CAFE Central Business Team	Departments
<b>Gift Receiving:</b> Process gifts, donor records, documentation, tax acknowledgments	Coordinate Endowment accounting	Request new gift fund and cost centers	Oversee creation of new gift and cost centers	Monitor and initiate changes to all gift accounts
<b>Gift and Estate Planning:</b> manage gift agreement process and provide legal expertise	Administer EGATS and hold all gift account records	Provide communication and support for departments/Central Business Team	Execute all change forms	Manage and reconcile cost centers monthly according to BPM E-2-1
	Prepare and provide financial reporting	Create and deliver impact reporting	Provide departmental support	Execute all spending on gift accounts
Monitor and manage special requirements on gift agreements per donor intent				



# Gift Purpose and Supporting Documentation

- Non-Endowed
  - Account creation paperwork with UFS
  - Sometimes includes formal agreements from donors
- Endowed
  - Endowment and Gift Tracking System (EGATS)
    - Database built by Endowment Services

Detailed Navigation

- Overview
- Endowment & Gift Account Tracking
- Cash Transmittal

## Financial Services Overview

### Financial Services

Provides access to Financial administrative tasks

#### Cash Transmittals

Authorized campus users may view and process cash transmittals

#### Endowment and Gift Account Tracking

Authorized campus users may view information on endowments

#### Cost Distribution Entry Module

Authorized campus users may view and enter base salary cost distributions

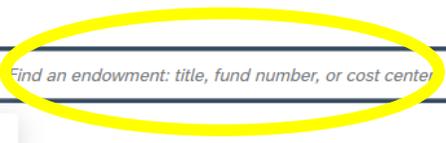
*Note: You will only see tabs and links for those applications for which you have permissions.*

Endowments [View All Endowments](#)

↳ Supported Purposes [View All Supported Purposes](#)

Search by entering title, fund number, or cost center.

Notes  
No notes found.



Endowment Detail **0705184300 - C. Bryan and Frances Bush Botts Scholarship**

Type: SCHOL RCTF: No Match: N/A Validation Status: Okay

	Total	Chair	Prof	Lect	Fell	Schol	Enric	Other	Acct Only
Active Supported Purpose	1	0	0	0	0	1	0	0	0

Held By:

Import Review: HIST

GovDoc ID: 1805

Ref Title: Governing Document for C. BRYAN AND FRANCES BUSH BOTTS SCHOLARSHIP

Override Reporting Dates

Reporting Dates: 2/17/2005 - 12/31/9999 ACTIVE

Override Dept.

Fund Dept: 81022 Agriculture - Associate Dean/Academic Programs

Fund Validity Dates: 2/17/2005 - 12/31/9999

Naming Rights

Access Dept: 81022 Agriculture - Associate Dean/Academic Programs

EG\_ID: 1812

- Supported Purpose
- Documents
- Donor Purpose
- Validation Messages
- FI Data - Fund
- Title and Type History
- Utilization Plan

EG-SP Link

Active

1215387770 SCHOL Dist: 100.00%  
2/17/2005 to 12/31/9999  
C. BRYAN AND FRANCES BUSH BOTTS SCHOLARSHIP  
Held By: N/A

Appt Period: N/A  
Usage Contact: N/A

1 of 1

**1215387770 C. BRYAN AND FRANCES BUSH BOTTS SCHOLARSHIP**

- Detail & Notes
- Appt. & Recruitment
- Validations
- FI Data - Cost Center
- Title & Type History

Prof To Chair: False Amount: \$0.00 Validation Status: Okay

Reporting Dates: 2/17/2005 - 12/31/9999 ACTIVE

Override Dept

CC Dept: 81022 Agriculture - Associate Dean/Academic Programs

Access Dept: 81022 Agriculture - Associate Dean/Academic Programs

Import Review: HIST

Allow Multiple Occupants

Always Copy Title From Parent

Always Copy Type From Parent

Always Copy Dates From Parent

EG-SP Link Period: 2/17/2005 - 12/31/9999

SP\_ID: 1583

Notes

Endowment Detail 0705184300 - C. Bryan and Frances Bush Botts Scholarship

Type: SCHOL	RCTF: No	Match: N/A	Validation Status: Okay						
	Total	Chair	Prof	Lect	Fell	Schol	Enric	Other	Acct Only
Active Supported Purpose	1	0	0	0	0	1	0	0	0

Notes

(No notes found)

Held By: Import Review: HIST

GovDoc ID: 1805 Ref Title: Governing Document for C. BRYAN AND FRANCES BUSH BOTTS SCHOLARSHIP

Override Reporting Dates Reporting Dates: 2/17/2005 - 12/31/9999 ACTIVE

Override Dept. Fund Dept: 81022 Agriculture - Associate Dean/Academic Programs Fund Validity Dates: 2/17/2005 - 12/31/9999

Naming Rights Access Dept: 81022 Agriculture - Associate Dean/Academic Programs EG\_ID: 1812

- Supported Purposes
- Documents
- Document Purpose
- Validation Messages
- FI Data - Fund
- Title and Type History
- Utilization Plan

Document List

Reference Name	Document Date / Type	Curr GovDoc?
C. Bryan and Frances Bush Botts Scholarship Agreement ID: 1082	2/17/2005 Endowment Agreement	True

Descriptive Data

**Reference Name:** C. Bryan and Frances Bush Botts Scholarship Agreement **Doc ID:** 1082

**Date on Document:** 2/17/2005 **Document Type:** Endowment Agreement

**Title on Document:** C. Bryan and Frances Bush Botts Scholarship **Is Confidential:** False

**Notes:** N/A

**Open Text ID:** 0050569F1B631EEB85F1547350A28882 **Source Filename:** 0705184300 agreement.pdf

**Added By:** AHBU222 **Date:** 10/26/2020 **Mod By:** AHBU222 **Date:** 10/26/2020

Linked to Funds

Fund	EGATS Status	Description	Is Curr GovDoc?	Document Purpose	Name Change	Purpose Change	Dept Change	Other Change
0705184300	Active	C. Bryan and Frances Bush Botts Scholarship	True	Establishment	False	False	False	False



1



2



3



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UNIVERSITY OF KENTUCKY  
**C. BRYAN & FRANCES BUSH BOTTS**  
SCHOLARSHIP AGREEMENT

THIS AGREEMENT made and entered into this the 17<sup>th</sup> day of February 2005, by and between Eleanor A. Botts, 3676 Ashworth Drive, Cincinnati, Ohio 45208 hereinafter referred to as the "Donor," and the UNIVERSITY OF KENTUCKY, Lexington, Kentucky 40506, hereinafter referred to as the "University."

WITNESSETH:

WHEREAS, the Donor desires to establish an endowed scholarship fund, hereinafter referred to as the "Fund", at the University in memory/honor of;  
**C. Bryan & Frances Bush Botts**, and

WHEREAS, the University agrees to receive and administer the scholarship fund in accordance with the wishes of the Donor and policies of the University.

NOW, THEREFORE, in consideration of the foregoing and the terms and conditions hereinafter set forth, the Donor and the University do hereby mutually agree as follows:

- (1) The scholarship fund shall be known as the "**C. Bryan & Frances Bush Botts Scholarship**".
- (2) The initial principal of the scholarship fund shall consist of \$10,000 which will include \$5035 from Eleanor Botts and \$4,965 from Procter & Gamble Co. At any time, additional contributions can be made to the principal of



## C. Frances and Bryan Bush Botts Scholarship- Purpose

be invested by the University in accordance with its policy for the investment of endowed funds and may be assessed an annual fee for development purposes not to exceed 1% of the endowed fund.

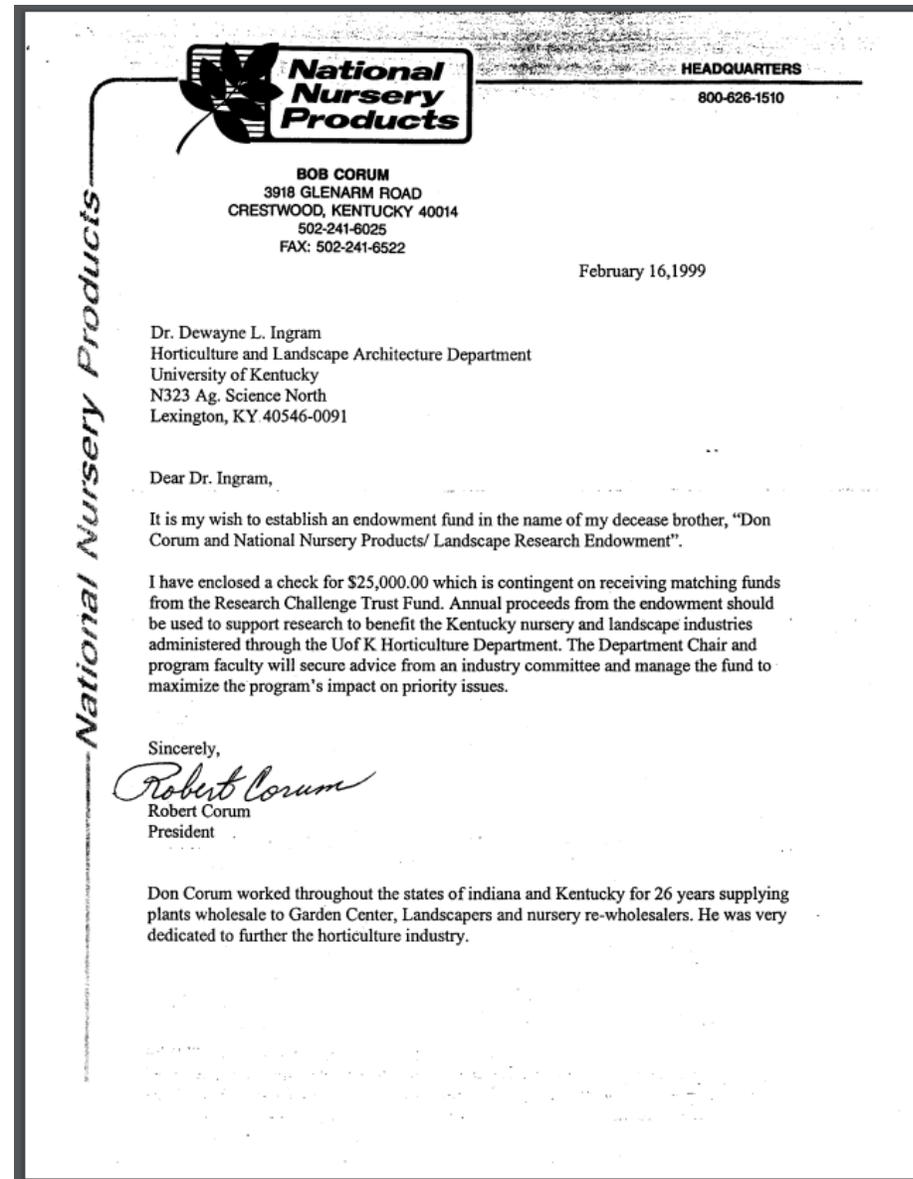
- (3) The recipient(s) of the scholarship(s) shall be selected by a Scholarship Committee appointed by the Dean and or Director of The School of Human Environmental Sciences of The College of Agriculture.
- (4) The scholarship(s) shall be awarded to students who:
  - (A) are undergraduate students actively enrolled in the School of Human Environmental Sciences.
- (5) The University shall, advise the Donor of the name(s) of the scholarship recipient(s) each year.
- (6) This agreement may be duplicated through photocopying, microfilming, or other means. Any such copy shall have the same force and effect of this original agreement.

**Joe and Sue Ross  
Endowed Fund in  
Biosystems and  
Agricultural  
Engineering-  
Purpose**

may be assessed an annual fee for development purposes not to exceed 1% of the endowed Fund.

- (3) The uses of the Fund's annual earnings shall be recommended by a Committee consisting of the Department's full professors to the Chairperson of the Department of Biosystems and Agricultural Engineering. The Chairperson shall make the final decision on expenditure of the funds.
- (4) The University shall, upon request, advise the Donors' family of the Fund's use each year.
- (5) This document may be duplicated through photocopying, microfilming, or other means. Any such copy shall have the same force and effect of this original document.
- (6) The Donors and the University expressly agree that this gift is gratuitous in nature, and that the Donors are under no legal duty to make further additions to

**Don Corum and  
National Nursery  
Products/Landscape  
Research  
Endowment-  
Documentation**



Active Supported Purpose	1	0	0	0	0	1	0	0	0
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**Held By:** Import Review: HIST

**GovDoc ID:** 1805 **Ref Title:** Governing Document for C. BRYAN AND FRANCES BUSH BOTTS SCHOLARSHIP

Override Reporting Dates **Reporting Dates:** 2/17/2005 - 12/31/9999 ACTIVE

Override Dept. **Fund Dept:** 81022 Agriculture - Associate Dean/Academic Programs **Fund Validity Dates:** 2/17/2005 - 12/31/9999

Naming Rights **Access Dept:** 81022 Agriculture - Associate Dean/Academic Programs **EG\_ID:** 1812

- Supported Purpose
- Documents
- Donor Purpose
- Validation Messages
- FI Data - Fund
- Title and Type
- History
- Utilization Plan

**Fund History**

Fund	IsCurr FundNo	Description	Valid From	Valid To	Business Area	Func Area	Dept Name	Link Type	Eff Date	End Date	EG_ID
0705184300	True	C. BRYAN & FRANCES BUSH BOTTS	2/17/2005	12/31/9999	0101 UK w/o component units	0810 Scholarships	81022 CENTER FOR STUDENT SUCCESS	ORIGINAL	2/17/2005	12/31/9999	1812

**Pooled Distribution**

Active - 07/01/2006 to 12/31/9999

Cost Object	% Dist	Description	Effective Period
0705184300	0.00	C. BRYAN & FRANCES BUSH BOTTS	07/01/2006 - 12/31/9999
1215387770	100.00	C. BRYAN AND FRANCES BUSH BOTTS	07/01/2006 - 12/31/9999

**0705184300 --** as of 2/3/2025

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**Name:** BOTTS SCHOLARSHIP

**Dept:** 81022 CENTER FOR STUDENT SUCCESS **Validity Period:** 2/17/2005 to 12/31/9999 **Create Date:**

**Bus Area:** 0101 UK w/o component units **Person Resp:** CAMPBELL, SUSAN **Created By:** PHUYN2

**Func Area:** 0810 Scholarships **Contact Person:** CARMEN AGOURIDIS

**Discipline:** 01. AGRICULTURE, AGRICULTURE OPERATIONS, AND RELATED SCIENCES. **Res Priority Area:** N NON-RESEARCH (EXCEPT LIBRARY)

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**Endowment Fields:**

<b>Contributed Value</b> ①	-\$536,090.10	<b>Endow Type:</b> 4 SCHOLARSHIP	<b>Endow Term:</b>
<b>Market Value</b> ②	-\$652,255.11	<b>RCTF:</b> N	<b>Term to True Amount:</b> \$0.00
<b>Spend Dist Reinv Available to Spend</b> ③	\$0.00	<b>Governing Doc:</b> E Endowment Agreement	<b>Exempt from Service Fees:</b>
<b>Underwater Current</b>	0%   0.00%	<b>First Deposit:</b> 6/30/2005	<b>Spec Conditions:</b>
<b>Underwater Annual</b>	0%   0.00%   as of FY24 Period 07		

**Shares and History**

FY / Per	Shares	Share Value	Est. Ann. Spend Dist	Spend Rule Rate	Mgmt Fee Rate
2019/12	43,264.45	8.8910	0.0000	0.3019	0.8200
2018/12	40,784.97	8.5493	0.0000	0.2884	0.5000
2017/12	38,198.42	8.1890	0.0000	0.2728	0.5000
2016/12	38,531.55	7.5509	0.0000	0.2573	0.5000
2015/12	34,854.66	7.7426	0.0000	0.2440	0.2500
2014/12	31,670.70	7.6707	0.0000	0.2326	0.2500

Active Supported Purpose	4	0	0	0	0	0	4	0	0
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**Held By:** Import Review: PEND

**GovDoc ID:** 5019 **Ref Title:** Governing Document for JOE AND SUE ROSS ENDOWED FUND IN BIOSYST

Override Reporting Dates **Reporting Dates:** 7/1/2000 - 12/31/9999 ACTIVE

Override Dept. **Fund Dept:** 81050 Agriculture Engineering **Fund Validity Dates:** 7/1/2000 - 12/31/9999

Naming Rights **Access Dept:** 81050 Agriculture Engineering **EG\_ID:** 5019

- Supported Purpose
- Documents
- Donor Purpose
- Validation Messages
- FI Data - Fund
- Title and Type History
- Utilization Plan

### Fund History

Fund	IsCurr FundNo	Description	Valid From	Valid To	Business Area	Func Area	Dept Name	Link Type	Eff Date	End Date	EG_ID
0705273400	True	JOE AND SUE ROSS ENDOWED FUND IN BIOSYST	7/1/2000	12/31/9999	0101 UK w/o component units	0520 Social and Cultural Devel	81050 BIOSYSTEMS & AGR ENGINEERING	ORIGINAL	7/1/2000	12/31/9999	5019

0705273400 -- JOE AND SUE ROSS ENDOWED FUND IN BIOSYSTEMS AND AGRICULTURAL ENGINEERING as of 2/4/2025

<b>Name:</b> ROSS ENDOWMENT	<b>Validity Period:</b> 7/1/2000 to 12/31/9999	<b>Create Date:</b>
<b>Dept:</b> 81050 BIOSYSTEMS & AGR ENGINEERING	<b>Person Resp:</b> CAMPBELL, SUSAN	<b>Created By:</b> AJHO229
<b>Bus Area:</b> 0101 UK w/o component units	<b>Contact Person:</b> MICHAEL MONTROSS	
<b>Func Area:</b> 0520 Social and Cultural Devel	<b>Res Priority Area:</b> N NON-RESEARCH (EXCEPT LIBRARY)	
<b>Discipline:</b> 14.0301 Agricultural Engineering		

**Endowment Fields:**

<b>Contributed Value</b> ⓘ: -\$273,032.28	<b>Endowment Type:</b> 6 ENRICHMENT	<b>Endow Term:</b>
<b>Market Value</b> ⓘ: -\$334,645.54	<b>Governing Doc:</b> E Endowment Agreement	<b>Term to True Amount:</b> \$0.00
<b>Spend Dist Reinv Available to Spend</b> ⓘ: -\$25,787.20	<b>Exempt from Service Fees:</b>	
<b>Underwater Current:</b> 0%   0.00%	<b>First Deposit:</b> 1/15/2021	<b>Spec Conditions:</b>
<b>Underwater Annual:</b> 0%   0.00%   as of FY24 Period 07		

### Pooled Distribution

Active - 05/01/2024 to 12/31/9999 ▼

Cost Object	% Dist	Description	Effective Period
0705273400	0.00	JOE AND SUE ROSS ENDOWED FUND IN BIOSYST	05/01/2024 - 12/31/9999
1215521030	50.00	JOE & SUE ROSS ENDOWED FUND - STUDENT	05/01/2024 - 12/31/9999
1215521040	20.00	JOE & SUE ROSS ENDOWED FUND -INSTRUCTION	05/01/2024 - 12/31/9999
1215521050	20.00	JOE & SUE ROSS ENDOWED FUND - RESEARCH	05/01/2024 - 12/31/9999
1215521060	10.00	JOE & SUE ROSS ENDOWED FUND - EXTENSION	05/01/2024 - 12/31/9999

**Shares and History**

(No history found)

Endowment Detail 0705122400 - Don Corum and National Nursery Products/ Landscape Research Endowment

Type: ENRIC	<b>RCTF: Yes</b>	<b>Match: RCTF II, III</b>	Validation Status: OI						
	Total	Chair	Prof	Fell	Schol	Enric	Other		
Active Supported Purpose	1	0	0	0	0	1	0		

**Held By:** **Import Review:** HIST  
**GovDoc ID:** 1097 **Ref Title:** Governing Document for Don Corum and National Nursery Products/Landscape Research Endowment  
 Override Reporting Dates **Reporting Dates:** 1/1/1900 - 12/31/9999 ACTIVE  
 Override Dept. **Fund Dept:** 81111 Horticulture - Rctf **Fund Validity Dates:** 1/1/1900 - 12/31/9999  
 Naming Rights **Access Dept:** 81111 Horticulture - Rctf

- Supported Purpose
- Documents
- Donor Purpose
- Validation Messages
- Fund Data - Fund**
- Title and Type History
- Utilization Plan

Fund History

Fund	IsCurr FundNo	Description	Valid From	Valid To	Business Area	Func Area	Dept Name
0705122400	True	DON CORUM AND NATIONAL NURSERY PRODUCTS/	1/1/1900	12/31/9999	0101 UK w/o component units	0230 Departmental Research	81111 HORTICULTURE - RCTF

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0705122400 --

<b>Name:</b> CORUM RESEARCH	<b>Validity Period:</b> 1/1/1900 to 12/31/9999	<b>Cre:</b>
<b>Dept:</b> 81111 HORTICULTURE - RCTF	<b>Person Resp:</b> CAMPBELL, SUSAN	<b>Cre:</b>
<b>Bus Area:</b> 0101 UK w/o component units	<b>Contact Person:</b> MARK WILLIAMS	
<b>Func Area:</b> 0230 Departmental Research	<b>Res Priority Area:</b> B BIOSCIENCES RESEARCH	
<b>Discipline:</b> 01.1103 Horticultural Science		

Endowment Fields:

<b>Contributed Value</b> ⓘ: -\$102,600.32	<b>Endow Type:</b> 6 ENRICHMENT	<b>Endow Term:</b>
<b>Market Value</b> ⓘ: -\$134,927.90	<b>RCTF:</b> Y	<b>Term to True Amount:</b> \$0.00
<b>Spend Dist Reinv Available to Spend</b> ⓘ: \$0.00	<b>Governing Doc:</b> N None of the above	<b>Exempt from Service Fees:</b>
<b>Underwater Current:</b> 0%   0.00%	<b>First Deposit:</b> 6/30/2005	<b>Spec Conditions:</b>
<b>Underwater Annual:</b> 0%   0.00%   as of FY24 Period 07		

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# New Endowment Creation

- New endowed fund creation requires a formalized agreement between the donor and UK
- The Office of Philanthropy & Alumni will facilitate the gift agreement and fund creation in coordination with the Business Office



# GR55 Report:

0705184300 - C. Bryan  
and Frances Bush Botts  
Scholarship

## Execute Report Group: Initial Screen

Data extracts Multiple selection

Report Group  UK Available Budget Report

## UK Available Budget Report: Selection

Data Source...

### Selection values

Financial Management Area   
Version   
Fiscal Year

### Selection groups

Fund   
Or value(s)  to    
Funds Center   
Or value(s)  to    
Commitment Item   
Or value(s)  to    
Functional Area   
Or value(s)  to    
Funded Program   
Or value(s)  to  

# GR55 Report:

0705184300 - C. Bryan and Frances Bush Botts Scholarship

## UK Available Budget



Variation: Characteristics

- Functional Area
- Fund
- Funded Program

Variation: Functional Area

- \* Functional Area
  - 0810 Scholarships

Funds center/commitment item	Budget	Actual	Parked FI Doc.	Encumbrance	Available Balan
** FdsCtr/CmmtItem					
* 1001000000 UK Default Cost Center					
425320 Endow Gift-NRCIF-Nex		30,000.00-			30,000.00
430050 Realized Gain and Loss - Endowment Pool		10,689.05-			10,689.05
431100 Endowment Actual Income		5,072.31-			5,072.31
433020 Unreal G/L Pool		9,793.56-			9,793.56
545022 Spending Rule Distribution		11,044.61			11,044.61-
750240 Transfer for Management Fee		2,959.97			2,959.97-
* 1001000000 UK Default Cost Center		41,550.34-			41,550.34
** FdsCtr/CmmtItem		41,550.34-			41,550.34

## GR55 Report:

0705184300 - C. Bryan  
and Frances Bush Botts  
Scholarship

Cost Center	FC name	G/L Acc ^	CI text	RefDocNo	Text	FM pstg d.	Order	Pymt Bdgt	WBS Elem.
1001000000	UK Default CCtr	545022	Spending Rule	111010728		08/28/2024		1,848.83	
1001000000	UK Default CCtr		Spending Rule	111062750		09/25/2024		1,848.83	
1001000000	UK Default CCtr		Spending Rule	111112573		10/23/2024		1,843.85	
1001000000	UK Default CCtr		Spending Rule	111163810		11/21/2024		1,838.37	
1001000000	UK Default CCtr		Spending Rule	111209474		12/18/2024		1,835.17	
1001000000	UK Default CCtr		Spending Rule	111257216		01/22/2025		1,829.56	
								<b>11,044.61</b>	
								<b>11,044.61</b>	

# KSB1 Report:

0705184300 - C. Bryan and Frances Bush Botts Scholarship

**Display Actual Cost Line Items for Cost Centers**

Document Master Record

Layout: Z\_EJDE224 Line Item Detail for Reconciliations  
 Cost Center: 1215387770 BOTTS SCHOLARSHIP  
 Report currency: USD US Dollar

Cost Center	Cost Elem.	Cost element name	Val.in rep.cur.	Doc...	RefDocNo	DocumentNo	Document Header Text	Offst.acct	Name of offsetting account	Doc. Date	Posting Date	Name
1215387770	431001	Endow Inc - Pool Inc	1,848.83-	SA	111010728	3038822415	SpendingRule distribu...	545022	Spending Rule	08/28/2024	08/28/2024	
1215387770		Endow Inc - Pool Inc	1,848.83-	SA	111062750	3038987420	SpendingRule distribu...	545022	Spending Rule	09/25/2024	09/25/2024	
1215387770		Endow Inc - Pool Inc	1,843.85-	SA	111112573	3039158301	SpendingRule distribu...	545022	Spending Rule	10/23/2024	10/23/2024	
1215387770		Endow Inc - Pool Inc	1,838.37-	SA	111163810	3039333634	SpendingRule distribu...	545022	Spending Rule	11/21/2024	11/21/2024	
1215387770		Endow Inc - Pool Inc	1,835.17-	SA	111209474	3039491855	SpendingRule distribu...	545022	Spending Rule	12/18/2024	12/18/2024	
1215387770		Endow Inc - Pool Inc	1,829.56-	SA	111257216	3039668789	SpendingRule distribu...	545022	Spending Rule	01/22/2025	01/22/2025	
	431001	<b>Endow Inc - Pool Inc</b>	<b>11,044.61-</b>									
1215387770	480010	Prior Year Fund Bal	29,250.78-	SA	110960209	3038612346	Fund Bal Carry Forward	590200	Bal Forward Offset	07/01/2024	07/01/2024	Fund Bal ...
	480010	<b>Prior Year Fund Bal</b>	<b>29,250.78-</b>									
1215387770	537050	Scholarsp-Undergrad	13,250.00	CA	P3-24229-0	3038763826		130030	AR-Student from PSCD	08/16/2024	08/16/2024	
1215387770		Scholarsp-Undergrad	13,250.00	CA	P3-25003-0	3039563765		130030	AR-Student from PSCD	01/03/2025	01/03/2025	
	537050	<b>Scholarsp-Undergrad</b>	<b>26,500.00</b>									
			<b>13,795.3...</b>									

# FM5S Report:

0705184300 - C. Bryan  
and Frances Bush Botts  
Scholarship

### Display Fund: Initial Screen

FM area

Fund	0705184300
FM Area	UK00

### Display Fund: Basic Screen

Long text... Change history... Change documents Classification

FM Area	UK00	University of Kentucky
Fund	0705184300	

#### Names

Name	BOTTS SCHOLARSHIP
Description	C. BRYAN & FRANCES BUSH BOTTS

#### Basic data

Valid from	02/17/2005	Valid To	12/31/9999
Fund Type	INTERN	Internal Fund	
Authorization group			

#### Additional data

Bdgt profile fund			
Customer for fund			
Funds application	103	NCB Restricted	
<input checked="" type="checkbox"/> Balance update			

Additional UK Fund Fields Add UK Endowment fields

# FM5S Report:

0705184300 - C. Bryan and  
Frances Bush Botts  
Scholarship

**UK Endowment fields**

FM Area: UK00 University of Kentucky  
Fund: 0705184300 C. BRYAN & FRANCES BUSH BOTTS

Additional UK Fields for Endowment

Endowment type	4	Non-Std Spending Distribution	S
Est. annual spending dist.	22,286.62	State Funded Proportion	0.00
Number of shares	51,883.50	Adjusted Contributed Value	0.00
Service fee	0.9500	Next Yr Est Spend	0.00
Share value	12.6006	Endowment Category	R
Spending rule rate	0.4422	Fund Currency	USD
RCTF	N	First Deposit	06/30/2005
Endowment Term			
Governing Document	E		
Exempt from service fees	<input type="checkbox"/>		
Spending Agreement	<input type="checkbox"/>		
Special Condition	<input type="checkbox"/>		

Cost Center and Fund cannot both be entered on the same line

Cost Center	Fund	Distribution percent
	0705184300	
1215387770		100.00

The total Distribution percent must be equal to 100 percent

## FM5S Report:

0705273400 - Joe and Sue  
Ross Endowed Fund in  
Biosystems and Agricultural  
Engineering

**UK Endowment fields**

FM Area: UK00 University of Kentucky  
Fund: 0705273400 JOE AND SUE ROSS ENDOWED FUND IN BIOSYST

**Additional UK Fields for Endowment**

Endowment type	6	Non-Std Spending Distribution	S
Est. annual spending dist.	11,693.06	State Funded Proportion	0.00
Number of shares	26,594.41	Adjusted Contributed Value	0.00
Service fee	0.9500	Next Yr Est Spend	0.00
Share value	12.6006	Endowment Category	R
Spending rule rate	0.4422	Fund Currency	USD
RCTF	N	First Deposit	01/15/2021
Endowment Term			
Governing Document	E		
Exempt from service fees	<input type="checkbox"/>		
Spending Agreement	4		
Special Condition	<input type="checkbox"/>		

Cost Center and Fund cannot both be entered on the same line

Cost Center	Fund	Distribution percent
	0705273400	
1215521030		50.00
1215521040		20.00
1215521050		20.00
1215521060		10.00

The total Distribution percent must be equal to 100 percent

# FM5S Report:

0705122400 - Don  
Corum and National  
Nursery Products/  
Landscape Research  
Endowment

## UK Endowment fields

FM Area  University of Kentucky  
Fund  DON CORUM AND NATIONAL NURSERY PRODUCT...

### Additional UK Fields for Endowment

Endowment type	<input type="text" value="6"/>	Non-Std Spending Distribution	<input type="text" value="S"/>
Est. annual spending dist.	<input type="text" value="4,724.09"/>	State Funded Proportion	<input type="text" value="50.00"/>
Number of shares	<input type="text" value="10,744.33"/>	Adjusted Contributed Value	<input type="text" value="0.00"/>
Service fee	<input type="text" value="0.9500"/>	Next Yr Est Spend	<input type="text" value="0.00"/>
Share value	<input type="text" value="12.6006"/>	Endowment Category	<input type="text" value="R"/>
Spending rule rate	<input type="text" value="0.4422"/>	Fund Currency	<input type="text" value="USD"/>
RCTF	<input type="text" value="Y"/>	First Deposit	<input type="text" value="06/30/2005"/>
Endowment Term	<input type="text"/>		
Governing Document	<input type="text" value="N"/>		
Exempt from service fees	<input type="checkbox"/>		
Spending Agreement	<input type="text" value="1"/>		
Special Condition	<input type="checkbox"/>		

Cost Center and Fund cannot both be entered on the same line

	Cost Center	Fund	Distribution percent
<input type="checkbox"/>		0705122400	
<input type="checkbox"/>	1215374450		100.00
<input type="checkbox"/>			

The total Distribution percent must be equal to 100 percent

# GR55 Report:

0705122400 - Don Corum and National Nursery Products/ Landscape Research Endowment Spending Account Balance

**UK Available Budget**

Variation: Characteristics

- Functional Area
- Fund
- Funded Program

Variation: Fund

- \* Fund
  - 0213744500 AG-G-HO-CORUM ENDOW

Funds center/commitment item	Budget	Actual	Parked FI Doc.	Encumbrance	Available Balan
** FdsCtr/CmmtItem					
* 1215374450 AG-G-HO-CORUM ENDOWM					
431001 Endowment Income - Pool Income	4,800.00-	2,396.03-			2,403.97-
480010 Prior Year Fund Balances		28,205.09-			28,205.09
480020 Appropriations of Fund Balances	24,000.00-				24,000.00-
530000 Budget Pool - Current Expenses	28,800.00				28,800.00
* 1215374450 AG-G-HO-CORUM ENDOWM		30,601.12-			30,601.12
** FdsCtr/CmmtItem		30,601.12-			30,601.12



# What's the point?

- UK is closely reviewing endowments and unspent dollars
- Management of these dollars helps everyone
- We want to help
  - Review your endowments and their purpose
  - Start thinking about spending plans moving forward considering:
    - Flex budget funds in other areas
    - Fundraising priorities
    - Work with philanthropy to solve problems

# We're here to help!

## Tressa Neal

[Tressa.Neal@uky.edu](mailto:Tressa.Neal@uky.edu)

859-257-2146

## Erin DesNoyers

[Erin.DesNoyers@uky.edu](mailto:Erin.DesNoyers@uky.edu)

859-218-5905

## Office of Philanthropy and Alumni

Cooper House: 1312 Nicholasville Road

859-257-7200

# Questions?