

# Memorandum of Understanding

## University of Wisconsin-La Crosse and

## UWL Alumni & Friends Foundation



### INTRODUCTION

This agreement is made and entered into on the 24<sup>th</sup> day of July 2025, by and between the University of Wisconsin-La Crosse ("University") and the UWL Alumni & Friends Foundation ("Foundation"). This agreement shall cover the term of July 1, 2025, to June 30, 2026.

The Foundation exists to raise and manage private resources supporting the mission and priorities of the University, provide opportunities for students, and contribute to institutional excellence.

The Foundation is dedicated to assisting the University by fostering a culture of philanthropy, growing the endowment, and providing financial and other support for long-term academic and other institutional priorities.

### GOAL SETTING

1. Continue to increase trust and transparency with external constituents and campus partners.
2. Fundraising Goals:
  - a. Exceed \$11M in total Fundraising
    - i. To be achieved through clear quarterly metric objectives and strategy mapping for Development Officers, Annual Giving, One Day, and Foundation Leadership.
  - b. Exceed \$5M in Revenue
    - i. Based on current annual revenue from outright gifts & pledge payments as well as fundraising goals for the Development Team
  - c. Achieve an endowment growth rate of 3.5%
    - i. Based on current market returns, fees, and endowment fundraising goals for the Development Team
  - d. Implement a fee structure to secure a revenue model of support for the Foundation with the intent to increase financial support for increased campaign budgetary needs (such as software, travel, collateral, and events) and for the express purpose of reducing the endowment fee to below 2.0%
  - e. Publicly share Solicitation, Acknowledgement, and Stewardship practices employed by the Foundation.
3. Infrastructure Goals:
  - a. Establish and execute a reorganization plan for implementation within the fiscal year to optimize roles toward addressing the support needs of the Foundation staff with the express purpose of furthering financial support of the University.
    - i. Roles include:
      1. Fund Compliance
      2. Data
      3. Operations
      4. Communications
  - b. Design and propose a Foundation incentive structure for approval by system, cabinet, and board based on peer models (Whitewater/Eau Claire) to retain and reward top talent.
  - c. Identify ongoing professional development and team building opportunities to energize and retain top talent.
  - d. Complete a minimum of one conference specific to mentoring, leadership and academic enterprise training for the Vice Chancellor of Advancement.
4. Policy Goals:
  - a. Establish Naming Policies with the University such as a Commemorative Tributes Policy and a Minimum Named Endowment and Fund Levels Policy
  - b. Investigate collaboration with the University on revising the Posthumous, Extraordinary,

- and Honorary Degrees Policy.
- c. Acquire board approval and make public the following policies and agreements:
  - i. MOU
  - ii. Operating Agreement
  - iii. Gift Acceptance Policy
  - iv. Endowment Policy
  - v. Investment Policy
  - vi. Short Term Investment Policy
- 5. Communication Goals:
  - a. Utilize best practices in change management with the Foundation Board of Directors, staff, and campus partners with a focus on increasing the *communicate change* and *empower & involve others* steps in the change management process.
  - b. Establish an MOU with UCOMM regarding shared services specific to donor/student impact stories, alumni engagement, and the creation and distribution of future campaign collateral.
  - c. Facilitate ongoing messaging highlighting the value of philanthropy.
  - d. Build out the Estate, Trust, and Planned Giving arm of the Development Enterprise through an overhaul of the website and redefining of the Legacy Society.
- 6. Chancellor Goals:
  - a. Facilitate strategic and meaningful donor engagement opportunities for the Chancellor through donor salons and events.
  - b. Support the priorities of the Chancellor and the University through participation in the implementation of the strategic plan.

## **TERMS OF THE MEMORANDUM OF UNDERSTANDING**

This Memorandum of Understanding made and entered into on the 24<sup>th</sup> day of July 2025, by and between the University and the Foundation is intended to set forth goals that shall contribute to the success of their mutual activities.

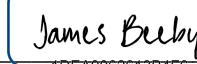
To ensure effective achievement of the goals of the agreement, the Vice Chancellor of Advancement/Foundation President will review these goals quarterly with the University Chancellor, bi-annually with the Executive Committee of the Foundation Board, and in an annual meeting comprised of the Board Chair, Board Vice Chair, University Chancellor, and Vice Chancellor of Advancement/President of the Foundation.

DATED this day 7/24/2025 | 2:02 PM CDT.

This agreement may only be amended by the mutual written consent of the University of Wisconsin-La Crosse and the UWL Alumni & Friends Foundation.

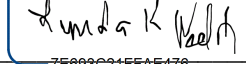
### **University of Wisconsin-La Crosse**

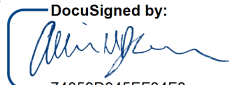
By:

Signed by:  
  
 James Beeby  
 Chancellor

### **UWL Alumni & Friends Foundation**

By:

Signed by:  
  
 Lynda Kohler Welsh  
 Board Chair

DocuSigned by:  
  
 Allison Ziegelman  
 Foundation President & Vice Chancellor for Advancement