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August 26, 2022

Ms. Deborah Reid  
Niagara Regional Police Services Board  
c/o Niagara Regional Police  
5700 Valley Way  
Niagara Falls ON L2E 1X8

Dear Ms. Reid,

Your support of Brock's students continues to be critical for our community of teachers and learners. It plays an important role in helping create equitable and prosperous futures for our students, our communities and our world. Your generosity ensures students can continue to focus on the invaluable contributions their learning and research make in our community and beyond, all while continuing to have the best possible student experience while on campus.

Your choice to support endowed scholarships and awards, helps to attract and retain the best students, educators and researchers to Brock. As an integral part of the Brock community, our students' ability to focus, learn and persist to graduation starts with you.

We are pleased to share with you the report for the following fund(s):

**Regional Municipality of Niagara Police Services Board Bursary 4th Year**  
**Regional Municipality of Niagara Police Services Board Bursary 2nd Year**

Your endowment makes a difference today and will continue to do so in the future. Brock remains committed to being responsible stewards of your gift; should you have any questions regarding the enclosed information, please reach out.

Thank you for investing in our students.

Sincerely,



Sonia Dupte  
Executive Director, Development & Campaigns

E: [sdupte@brocku.ca](mailto:sdupte@brocku.ca)  
C: 905-650-7032



As a partner, we value your feedback. Please take 3-5 minutes to complete a brief survey that can be found using the QR code or at [brocku.ca/development/survey](https://brocku.ca/development/survey).

## ABOUT THE FUND

### Regional Municipality of Niagara Police Services Board Bursary 2nd Year

#### BEGINNING VALUES

Book Value as of April 30, 2021	\$19,714.97
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*(Balance of endowment fund excluding unrealized gains and losses since inception)*

Market Value as of April 30, 2021	\$27,251.82
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*(Balance of endowment fund including unrealized gains and losses since inception)*

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#### 2021-2022 ACTIVITY

Actual Spending	\$730.00
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*(In the 2021-2022 academic year)*

New Donations	\$0.00
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Realized Investment Income	\$922.03
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*(Net management costs)*

Unrealized Investment Income/(Loss)	\$(1,453.35)
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#### ENDING VALUES

Book Value as of April 30, 2022	\$19,907.00
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Market Value as of April 30, 2022	\$25,990.50
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Spending Allocation	\$785.00
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*(Available for the 2022-2023 academic year. Calculated based on the Book Value as of April 30, 2021)*

## 2021-2022 RECIPIENT(S)

Michelle Siddle  
Social Sciences

## ABOUT THE FUND

### Regional Municipality of Niagara Police Services Board Bursary 4th Year

#### BEGINNING VALUES

Book Value as of April 30, 2021	\$16,211.77
<i>(Balance of endowment fund excluding unrealized gains and losses since inception)</i>	

Market Value as of April 30, 2021	\$22,708.77
<i>(Balance of endowment fund including unrealized gains and losses since inception)</i>	

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#### 2021-2022 ACTIVITY

Actual Spending	\$625.00
<i>(In the 2021-2022 academic year)</i>	

New Donations	\$0.00
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Realized Investment Income	\$758.19
<i>(Net management costs)</i>	

Unrealized Investment Income/(Loss)	\$(1,195.10)
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#### ENDING VALUES

Book Value as of April 30, 2022	\$16,344.96
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Market Value as of April 30, 2022	\$21,646.86
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Spending Allocation	\$645.00
<i>(Available for the 2022-2023 academic year. Calculated based on the Book Value as of April 30, 2021)</i>	

## 2021-2022 RECIPIENT(S)

Taylor Campeau  
Social Sciences

# 2021-22 Endowment Report

In 2021-2022, endowed funds allocated over **\$3.1M** to support students with vital resources, including scholarships, research, programming, and more.

## What is an endowment?



Brock's endowment is a fund made up of philanthropic gifts in which the University has assumed responsibility for ensuring perpetuity for the programs and activities designated. Endowed gifts are a vital part of supporting the University and its students.

## Endowment Investments



The funds for each endowment are pooled for investment purposes; however, each individual endowment fund is accounted for separately. Pooled endowment funds are invested in accordance with the University's Investment Policy.

**\$119,024,870.27**

**Brock's endowment  
Market Value**

*\*The value at which investments in the endowment pool could be sold in the open market as of April 30, 2022.*

**\$92,740,170.93**

**Brock's endowment  
Book Value**

*\*The value of all contributions and capitalized earnings that have been deposited into the endowment principal as of April 30, 2022.*

**73.4%**

**of Brock's endowment  
supports student awards**

**\$1,228.40**

**average  
donor-funded  
student award**

**636**

**funds  
supporting student  
awards**



## How does Brock determine its endowment spending?

Spending decisions will endeavor to ensure that the original donated capital maintains its purchasing power. Therefore, the spending decision will be made by the Financial Planning and Investment Committee and take into consideration all objectives of the endowment policy, along with the investment fund performance, economic conditions, and other relevant factors.

For more information on how the spending allocation is determined, please visit [brocku.ca/policies](https://brocku.ca/policies) and select **Endowment Management** under **Financial Policies**.

## 2021 Endowment Fund Return

**12.1%**  
**Investment return**

2016	2017	2018	2019	2020
4.9%	12.0%	2.3%	17.5%	10.1%

### IMPACT STORY

## Investing in the success of our students

Adele Orr came to Brock in 2021 in search of an accessible, hands-on academic experience. Impressed by Goodman School of Business' reputation, Orr enrolled in Goodman's Bachelor of Accounting co-op program with hopes to obtain her Chartered Professional Accountants of Ontario (CPA) designation and become a forensic accountant.

In her first year, Orr was the recipient of an endowed award to which she attributes much of her success; **"This award has gone a long way in ensuring I could succeed in my first year at university. By relieving the financial stress that often comes with post-secondary education, this award allows me to focus on doing better in my classes."**

Born with Cystic Fibrosis, and battling with a host of complications, Orr has found support in all aspects of her university life here at Brock. Orr is pleased to know that she is one of hundreds of Brock students that are enabled to succeed each year thanks to the generosity of donors supporting endowed awards.



**Adele Orr**

*2nd year,  
Bachelor of Accounting  
co-op student*