

JAMES A. GRAASKAMP COLLECTION OF TEACHING MATERIALS

IV. UW REAL ESTATE ALUMNI ASSOCIATION

D. Fund-raising

1. Miscellaneous Administrative Records and  
Accounts, 1985-1988

University of Wisconsin-Madison

September 25, 1985

To: Dianne Orbison

From: James A. Graaskamp

Re: Real Estate Alumni Budgets

Alumni administrative costs for the balance of 1985 chargeable to account 199:

1. Revision of alumni mailing list formatted for  
printing from Landmark computer .....\$ 90.00
  2. Printing of 300 sets of revision at \$2.00 each.....\$600.00
  3. Repair of Real Estate Department computers,  
projectors and other equipment. ....\$100.00
  4. One alumni newsletter:  
    Printing 750 copies x 5 pages x .03¢ = .....\$112.50  
    Postage 750 copies x .22¢ = .....\$165.00  
    Stuffing and preparation for bulk mail .....\$ 80.00
  5. Contingencies .....\$250.00
- Remaining account 199 budget for 1985.....\$1397.50

Proposed Real Estate Alumni Association Budget for 1986

1. Scholarships		
Ratcliff scholarship .....	\$1500.00	
Larson scholarship .....	\$1000.00	
Eight \$500 Alumni scholarships .....	\$4000.00	
		SUBTOTAL
		\$6500.00
2. Communications		
Three revisions of alumni mailing list formated for printing by Landmark at \$90 each .....	\$ 270.00	
Printing of 250 sets of each revision at \$2.00 each .....	\$1500.00	
Postage 750 copies x \$1.50 = .....	\$1225.00	
Sale of 100 copies at \$3.00 each .....	\$ 300.00	cr
Four alumni newsletter per year 750 x 5 x .03 x 4 = .....	\$ 450.00	
Postage 750 copies x .22¢ x 4 = .....	\$ 660.00	
Stuffing .....	\$ 320.00	
		SUBTOTAL
		\$4125.00
3. Departmental expenses		
Repair and modification of Real Estate Department computers, projectors and other equipment .....	\$ 500.00	
Purchase of visual aids, video tapes and slides .....	\$ 600.00	
Reimbursement of faculty travel expense for Robbins, Matthews and Myers to present research papers or solicit research funding. (School of Business provides very limited help on travel expenses to tenured professors once a year to deliver a paper.) .....	\$ 750.00	
		SUBTOTAL
		\$1850.00
4. Miscellaneous contingencies .....	\$ 400.00	
		FINAL TOTAL
		\$12875.00

DATE: February 1, 1986  
TO: Regional Real Estate Alumni Fundraisers  
FROM: Professor James Graaskamp  
RE: Cash receipts to date on Alumni Fundraising Campaign

The first quarterly accounting data is now available, although the UW Foundation format is a little confusing. We have just purchased an IBM XT with two floppies and 10K hard disc to build our own Alumni system so that future reports may be better focused on what you fundraisers want to know. In the mean time the enclosed will have to do.

There are two Alumni accounts. The endowment account is Fund 235. The Alumni operating account to be financed from dues and miscellaneous income, such as profits on the Seminar, is Fund 199.

Exhibit A is a tally of cash funds deposited in 235 during the last month of 1985 and includes checks received through January 15th for tax deduction purposes. We have also enclosed Exhibit B, which is the 12-month report for contributions to Account 235.

However, some donors and many matching grants went directly to the UW Foundation, who then deposited them in the Real Estate Alumni operating account 199 so that some adjusting will be needed for the first month of 1986.

Exhibit C is the 12-month record on Account 199 and Exhibit D is the December 1985 record on Account 199. It is our policy to consider anything less than \$101 to be real estate dues and any contribution greater than that amount to be intended for Account 235. The only exceptions are where the check is specifically designated to be for scholarships, in which case it stays in Account 199 from which we transfer scholarship funds, newsletter costs, and all other operating items for the Alumni. A profit of approximately \$5,200 on the Seminar has also been transferred to 199 as of the first of the year to close out our Randall Bank account for Seminar operations.

After these adjustments are made we will begin the year with an endowment fund of approximately \$255,000. We continue to keep it invested in the UW Foundation short-term bond fund because it provides a higher average return than the long-term fund. Last year we produced \$16,356 of interest income on an average balance of approximately \$150,000; this year the rate of return should be closer to 9%, but I hope our average balance will move over \$300,000.

Regional Real Estate Alumni Fundraisers  
February 1, 1986  
Page 2

During 1985 we spent approximately \$4,200 on our guest speaker program, \$4,500 for summer research report for Professor Michael Robbins, and \$5,527 for teaching assistants, Ginnie Mittnacht, and similar items. Finally, \$9,050 was spent on fundraising materials in terms of printing costs, mailing of supplies to fundraisers, and related items. With the exception of fundraising investment, the fund lives within its income.

The rush of pledge forms and checks at the end of December and beginning of January has made it impossible to report the data in terms of regions and in terms of a break-out on who has paid dues, who has met their pledge, or who may have missed the first pledge payment, but hopefully that data will be available for you by the end of February.

Attached to this memo is a reporting form on which we would like each of you to record any special fundraising efforts you are attempting in your area. For example, Chief was in Dallas the third week in January and attended a supper which was hosted by Allianz, Inter-First Bank, and Criswell Development. Since the dinner was paid for, the Alumni attending were asked to contribute their normal dinner fee to the Alumni Fund. In fact, they were challenged by a guest, Rudy Robinson, an appraiser and entrepreneur from Austin, Texas, to match his challenge check drawn in the amount of \$2,000; the Alumni present almost doubled it with \$3,600 of their own in addition to what they might have given previously, so the Chief took home \$5,600 for the Endowment Fund. A corporate host for lunch or dinner converts an expense account item for the host to a charitable donation for those attending the lunch and making the gift to the Alumni. What tricks can you offer?

We hope to report some significant corporate gifts in the next report.

JAMES J. ABLAN  
401 NORTH MICHIGAN AVENUE, SUITE 525  
CHICAGO, ILLINOIS 60611 • (312) 321-1521

VIA MESSENGER

December 17, 1986

Mr. James Magnanenzi  
Northwestern Mutual Life  
Insurance Company  
100 South Wacker Drive  
Chicago, Illinois 60606

Mr. Steven Meyers  
Bennett & Kahnweiler  
9700 West Bryn Mawr  
Rosemont, Illinois 60018

Gentlemen:

Enclosed are the pledge records for the Chicago Region. Will you please coordinate with Dan Guenther regarding approach and follow-up for Alumni pledges. We should ask Guenther to get you on the mailing list. I'll work on getting dues and pledges from all members.

Best regards,

James J. Ablan

JJA/dgb  
Enclosures

cc: Mr. Dan Guenther ✓  
w/o Enclosures



**Dianne Orbison, Alumni President**  
Mutual Service Life Insurance Company  
P.O. Box 64035  
St. Paul, MN 55164

December 1, 1986  
**University of Wisconsin Real Estate Alumni Assoc., Inc.**  
Room 118 • School of Business • 1155 Observatory Dr. • Madison, WI 53706

Ms. Dianne M. Orbison  
MSI INSURANCE COMPANY  
Box 64035  
St. Paul, MN 55164

SAMPLE  
COPY

Dear Dianne:

In the near future, the Endowment Fund Drive computer system developed by our grad students will be able to provide you with conveniently formatted records of pledges, contributions, and dues received from our alumni and corporate sponsors.

However, to assist your current fundraising efforts, Dan Guenther has manually prepared a set of alumni records for each region. Each alumni record shows pledges, contributions, and annual dues received during the calendar years listed. We are also sending you the most current alumni directory to facilitate a telephone call or note.

NEED  
SUGGESTIONS  
FOR THE  
OCTOBER 1987  
REUNION!

As you know, we recently billed everyone for their 1986 pledge. We are encouraging everyone to pay their 2nd & 3rd year pledges as a single lump sum to take advantage of the last year for itemized deductions on their income tax. We would like you to call only those people in your territory who have provided neither dues nor an endowment gift. (Note: For gifts over \$25, we consider dues paid.) Our primary objective should be to have all our members pay \$25 in dues. With over 700 alumni, we can raise almost \$20,000 annually just from dues.

For those who pay their dues in 1986, we will be sending a fully revised and updated directory in January.

Sincerely,

James A. Graaskamp  
Chairman, Department of Real Estate  
and Urban Land Economics

Enclosures

Wisconsin Real Estate Alumni  
Association, Inc.  
School of Business, Rm. 118  
1155 Observatory Drive  
Madison, WI 53706  
(608) 262-0787

November 7, 1986

Dear Alumnus/Program Sponsor:

With year's end and the new tax code rapidly approaching, we'd like to remind you of your pledge of support for the Wisconsin Real Estate Endowment Fund. Your timely contribution will allow the endowment fund to generate its targeted level of interest income in 1987. With additional budget cuts looming ahead for the University of Wisconsin, your support is needed more than ever.

At the bottom of the page you will find a remittance form to accompany your gift. If you have already contributed the full amount of your 1986 pledge, please ignore this reminder.

Thank you for your continuing support of the UW Real Estate Program and best wishes for the holidays!

Sincerely,



Dan Guenther  
Alumni Liaison

Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Phone \_\_\_\_\_

Amount of Gift: \_\_\_\_\_

Apply toward pledged amounts  
as follows:

1985: \_\_\_\_\_

1986: \_\_\_\_\_

1987: \_\_\_\_\_

Make check payable to "Wisconsin Real Estate Endowment Fund" and mail to:

Wisconsin Real Estate Alumni Association, Inc.  
School of Business, Room 118  
1155 Observatory Drive  
Madison, WI 53706





*Sample Copy*

December 1, 1986

ATTENTION: Regional Directors & Fundraisers

In several of the regions we enjoy the luxury of having more than one fundraiser. We'll leave it to each Regional Director to divide up the fundraising effort for that region. Please note the comments in Chief's letter regarding which alumni to contact for dues and new pledges/contributions.

Also, a revised copy of the Alumni & Program Sponsor Directory is at the Copy Center and will be forwarded to you shortly.

Dan Guenther, Alumni Liaison

MEMORANDUM

TO: D. R. Anderson  
R. T. Aubey  
N. M. Ford  
— J. A. Graaskamp  
D. J. Harmatuck  
H. G. Heneman  
J. M. Johannes  
J. G. Morris  
L. E. Rittenberg

FROM: E. J. Blakely *EJB*

DATE: April 28, 1986

I am attempting to corral a record of all "gift funds" available to your area of interest.

The attached list as of 12-31-85 is a "first" best effort to prepare a comprehensive list of gift funds. As soon as we can confirm that this listing is all we know about, we will develop a computerized record in order to keep the accounts current. We will also develop a brief description of the terms of the gift for easy reference.

Please advise me of any changes in the attached listing. Positive confirmation requested by May 7, 1986.

mjh

SCHOOL OF BUSINESS  
Non-State, Non-Lapsing Fund Balances

Real Estate  
Account Balances  
12-31-85

<u>Fdn.</u>	<u>Location</u>		<u>Description</u>	<u>Balance</u>
	<u>UW</u>	<u>Other</u>		
245			Homer Hoyt Res.	\$ 2,686.45
241			Pension Fund	642.88
199			Alumni	1,313.56
235			Endowment Fund	241,837.98
202			Program Fund	8,233.48
227			Urban Land Inst.	888.66
203			Urban Land Econ.	20.00
	J190		General	(3,639.01)
		162-End	Stark Endow.	12,949.17
		161-0350	Stark Scholarship	14,106.93

*Daac Konshak 262-5981*  
*Director of Trust Fund ---*

*file copy*



Graduate School of Business

University of Wisconsin-Madison

*Sample of fund transfers*

1155 Observatory Drive  
Madison, WI 53706  
608/262-0391

TO: John Feldt  
University Foundation

FROM: Prof. James A. Graaskamp

SUBJECT: Transfer of Alumni Scholarship Fund


Please transfer \$5,700.00 from the Real Estate Alumni Account 199 to the School of Business Scholarship account for the attached list of scholarships. Thank you.

JG:mjf

Attachment

September 11, 1986

TO: Prof. James A. Graaskamp

FROM: Helene Noltner 

In response to your letter of 9/4/86 requesting a figure to be transferred to cover your 1986-87 awards, my records show the following:

Real Estate Alumni Awards

Levitt, Daniel R.	\$200	
Lottes, Sandra	500	
Engelman, Douglas	<u>1,000</u>	
		\$1,700

Ratcliff Award

Slupski, Vincent		500
------------------	--	-----

Fran Larsen Award

Wilbrecht, Karen		1,500
------------------	--	-------

Zuckerman-Komppa

Evans, Angelia (Inter-Session)	1,000	
Spence, Rita	<u>1,000</u>	<u>2,000</u>
		<u>\$5,700</u>

cc: K. Saenger

March 19, 1988

MEMORANDUM

TO: George Brieske/John Feldt  
FROM: James A. Graaskamp  
RE: Transfer of Funds from Foundation to 133-J190

Please transfer \$6,244.03 dollars from real estate alumni operations account 199 to business school account J190:

George Helmke - administrative salary	\$2,459.03
Alumni Laser Printer	3,285.00
Real Estate alumni scholarship (S. Karner)	<u>500.00</u>
TOTAL	\$6,244.03

January 27, 1988

M E M O R A N D U M

To: James A. Graaskamp  
School of Business  
318 Commerce Building

From: Kathy Saenger  
Program Assistant

This is in response to your phone call to me on December 17th concerning transfers in October 1987 of \$75,000.00 from account 17235 and a transfer of \$321.00 from account 17199 in order to cover a deficit of \$68,305.22 from June 1987 in account 133-J190. Copies of your memos to John Feldt and George Brieske dated July 14, 1987 are attached directing that a transfer of \$29,068.86 and \$36,421.82 for a total of \$65,490.68 be made from 235 and \$3,794.66 be made from 199. Total transfer amount allowed by you was \$69,285.34. Since only \$321.00 of the \$3,794.66 was transferred from account 199, we will at this time make a transfer request back to 235 for \$3,473.66 in order to keep your records straight. The excessive amount of \$6,035.66 (in re: \$75,000.00) from 235 was done in order to keep 133-J190 in the plus. Research Administration will no longer allow us to operate in a deficit situation in any of our gift accounts. Currently 133-J190 has a debit balance of \$3,709.86. Also, requests made by anyone directly to John Feldt will not be done without Dean's approval on the request.

I hope that this answers your questions about your accounts. Please give me a call if you have any further questions. It would also be very helpful if you could copy me on any further correspondence to Mr. Feldt or Dean Brieske.

Sorry for the untimely response to your questions.

Enclosures

cc:George H. Brieske

July 14, 1987

M E M O R A N D U M

TO: G.H. Brieske

FROM: James A. Graaskamp

RE: Please transfer the following funds from Real Estate Endowment 235 at the UW Foundation to Account 133-J190

James A. Graaskamp	1411	6/86-8/86	11,373.25	6/86
James A. Graaskamp	1111	8/86-10/86	394.37	3/87
Michael Robbins	1411	5/85-6/86	4,929.26	6/86
Michael Robbins	1411	7/86-8/86	4,949.54	7/86
Michael Robbins	1411	7/86-8/86	2,474.78	8/86
Michael Robbins	1411	6/87-7/87	11,338.87	7/87
Michael Robbins		Travel	341.35	11/85
Fred Peterson		Honorarium & Expenses	<u>620.40</u>	10/85
			\$36,421.82	

0 • C

0 •

11,373.25 +  
4,929.26 +  
4,949.54 +  
2,474.78 +  
394.37 +  
11,338.87 +  
341.35 +  
620.40 +  
36,421.82 +



0 • c  
 0 • c  
 10,553.11 +  
 3,114.88 +  
 1,931.20 +  
 6,076.47 +  
 5,712.10 +  
 192.00 +  
 1,416.25 +  
 31.00 +  
 21.50 +  
 8.75 +  
 11.50 +  
 29,068.86 +

**Business**

Madison

and G.H. Brieske

Wausau *Wausau*

Transfer from Real Estate Alumni Account 235 to Business School Account

**Graduate School of Business**

1155 Observatory Drive  
 Madison, WI 53706  
 608/262-0391

D. Guenther - T.A.	1019	9/86-2/87	10,553.11	9/86
H. Levy - P.A.	1381	8/86-1/87	3,114.88	9/86
M. Schack - T.A.	1371	8/86-1/87	1,931.20	10/86
Evan Harrison - T.A.	1371	1/87-5/87	6,076.47	1/87
E. Worzala-Fund Raising Admin	1081	1/87-6/87	5,712.10	1/87
Robin Lehman	1030	5A-5C	192.00	6/87
E. Worzala-Salamon Brothers	1081	7/87-8/87	1,416.25	6/87
via Landmark				
Trf. Audio Visual - Nov.			31.00	12/85
CHS Copy Center - April			21.60	5/86
Federal Express			8.75	5/86
Instructional Media Dist. Center			11.50	7/86
			<hr/>	
			\$29,068.86	

Please transfer \$29,068.86 for the above items.

39.00+  
 182.00+  
 518.50+  
 149.50+  
 50.00+  
 50.00+  
 1,000.00+  
 1,000.00+  
 507.55+  
 21.00+  
 35.21+  
 52.20+  
 159.40+  
 3,794.66+

**Business**

Madison-Madison

Graduate School of Business

1155 Observatory Drive  
 Madison, WI 53706  
 608/262-0391

and G.H. Brieske

Graaskamp *gab*

from Real Estate Alumni Account 199 to Business School Account

M. Scherb	1030	6A	39.00	6/86
M. Winans	1030	6A	182.00	6/86
Ralph Cram	1030	6B-6C	518.50	7/86
Susan Sary	1030	7A-7C	149.50	7/86
M. Scherb	1030	8B	50.00	8/86
M. Winans	1030	8B	50.00	8/86
D. Engleman	5711	NOT AWARDED	1,000.00	9/86
Rita Spence	5711	NOT AWARDED	1,000.00	10/86
National Fire Protection		626E312	507.85	9/85
Landmark Research		626E426	21.00	10/85
" "		675F813	35.21	12/85
" "		675F883	82.20	12/85
Fleet Car - Mark Ebacher			159.40	6/86

$$\begin{array}{r}
 \text{\$3,794.66} \\
 - 321.00 \\
 \hline
 3473.66
 \end{array}$$