





UNIVERSITY OF NOTRE DAME

2018 STEWARDSHIP CALENDAR

— *You Create The Impact* —





Venite ad me omnes—“Come to me, all of you”



▶ IMPACT ON UNDERGRADUATE SCHOLARSHIPS



Allan J. '57 and Radwan Riley

ALLAN J. AND RADWAN RILEY

Allan J. Riley Endowment for Undergraduate and Graduate Financial Aid

In a profound act of generosity, Allan '57 and Radwan Riley blessed Notre Dame with the largest gift to financial aid in the University's history. Their generosity will support the Allan J. and Reda Radwan Riley Scholarship, as well as the Leo and Edna Riley-Aref and Helena Jabbour Scholarship, named in honor of their parents. The two families placed a high value on their children's education. "We both appreciate what our parents sacrificed on our behalf," Radwan said, referencing her late husband, "and now we feel it is our turn to do something worthy of their memory and honorable effort. We, as they, believe that learning of all kinds is the key to prosperity and understanding the needs of others."

JANUARY / 2018

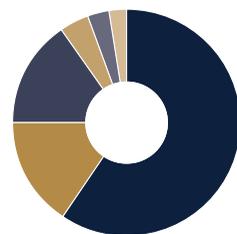
| S | M | T | W | T | F | S |
|---------------|--|---------------------|----|----|----|-------------------------------------|
| | 1 New Year's Day Mary, Mother of God | 2 | 3 | 4 | 5 | 6 Feast of St. Andre Bessette |
| 7 Epiphany | 8 Baptism of the Lord | 9 | 10 | 11 | 12 | 13 |
| 14 | 15 Martin Luther King Jr. Day | 16 Classes Begin | 17 | 18 | 19 | 20 Feast of Blessed Basil Moreau |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 | | | |

Sources of Undergraduate Aid

FISCAL YEAR 2016-17

\$243,436,919

| | |
|---------------------------------------|---------------|
| University Scholarships..... | \$144,779,221 |
| Loans..... | \$38,079,797 |
| Grants..... | \$37,156,121 |
| External Scholarships..... | \$10,135,466 |
| ROTC Scholarships..... | \$7,336,605 |
| Campus Employment and Work-Study..... | \$5,949,709 |



Gifts to Undergraduate Scholarships

BY FISCAL YEAR • IN MILLIONS • ENDOWED AND EXPENDABLE

| | |
|-------|---------|
| 12/13 | \$28.08 |
| 13/14 | \$28.00 |
| 14/15 | \$45.84 |
| 15/16 | \$29.94 |
| 16/17 | \$63.69 |





The sun rises over the Grotto of Our Lady of Lourdes after a winter snowfall



▶ IMPACT ON THE ACADEMY



John '88 and Jill Coyle '89

JOHN AND JILL COYLE

Coyle Mission Professorships

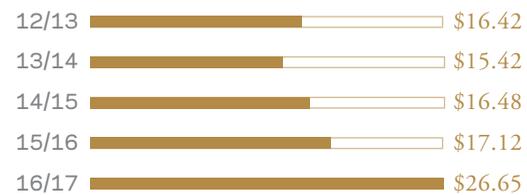
John '88 and Jill Coyle '89 met while attending Notre Dame and later married in the Basilica of the Sacred Heart. With two of their children enrolled as undergraduates, the Coyles sought a way to give back. Inspired by the University's enduring commitment to its Catholic character, John and Jill established the Coyle Mission Professorships to support the recruitment of Catholic intellectuals. "Every school has a mission statement," John points out, "but not every school has the same mission statement after 175 years—that is what makes Notre Dame unique. Our hope is that this gift will allow that sacred mission to continue to stand the test of time."

FEBRUARY / 2018

| S | M | T | W | T | F | S |
|------------------------------|-----------------------|----|--|----|-------------------------------|------------------------------|
| | | | | 1 | 2 Presentation of the Lord | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 Valentine's Day Ash Wednesday | 15 | 16 Junior Parents Weekend | 17 Junior Parents Weekend |
| 18 Junior Parents Weekend | 19 Presidents' Day | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | | | |

Gifts to Professorships and Directorships

BY FISCAL YEAR • IN MILLIONS • ENDOWED GIFTS ONLY



Gifts to the Academy

FISCAL YEAR 2016-17 • ENDOWED, EXPENDABLE, CAPITAL, AND GIFTS-IN-KIND

\$155,193,745

| | |
|--|--------------|
| College of Arts & Letters | \$33,003,249 |
| Mission | \$24,041,578 |
| College of Science | \$21,069,519 |
| College of Engineering | \$19,423,982 |
| Other (First Year of Studies, Provost Office, etc.) | \$15,953,312 |
| Mendoza College of Business | \$14,583,526 |
| Office of Research | \$6,785,537 |
| Hesburgh Libraries | \$5,821,438 |
| School of Architecture | \$5,441,627 |
| School of Law | \$4,588,758 |
| Arts | \$2,470,879 |
| Graduate School | \$2,010,340 |





Matt Kavanagh '16 (50) celebrates the game-winning goal against University of North Carolina



▶ IMPACT ON STUDENT-ATHLETES



The O'Connor family from left: Kevin '89, Erin, Mary, Kathleen, James, Anne

KEVIN AND KATHLEEN O'CONNOR

*Kevin and Kathleen O'Connor
Family Lacrosse Grant-in-Aid*

Kevin O'Connor '89 only played the last of his four years of Notre Dame lacrosse for coach Kevin Corrigan, but that senior season was clearly a formative one. "You would be hard-pressed to find a coach that cares and does as much for his players and their future careers as Coach Corrigan," O'Connor says. In an effort to make a difference in the lives of future student-athletes, the O'Connors reached out to Corrigan to determine the program's greatest needs. The Kevin and Kathleen O'Connor Family Lacrosse Grant-in-Aid was the result. "When I was a student, the lacrosse program did not have scholarships," O'Connor says. "Thankfully, the program has now obtained full scholarship level, and our gift is to ensure it stays that way. I hope to encourage others to help perpetuate the success of men's lacrosse at Notre Dame."

MARCH / 2018

| S | M | T | W | T | F | S |
|---------------------------|---------------------------|----|----|---------------------|-------------------------------------|--------------------------------|
| | | | | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 Mid-Term Break Begins |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 St. Patrick's Day |
| 18 Mid-Term Break Ends | 19 Feast of St. Joseph | 20 | 21 | 22 | 23 | 24 Annunciation of the Lord |
| 25 Palm Sunday | 26 | 27 | 28 | 29 Holy Thursday | 30 Good Friday Easter Holiday | 31 Holy Saturday |

Gifts to Athletic Grants-In-Aid

BY FISCAL YEAR • IN MILLIONS • ENDOWED AND EXPENDABLE

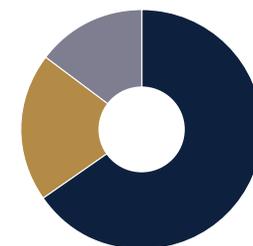
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|-------|--|--------|
| 12/13 | | \$3.52 |
| 13/14 | | \$3.24 |
| 14/15 | | \$3.86 |
| 15/16 | | \$2.18 |
| 16/17 | | \$4.38 |

Gifts to Athletics

FISCAL YEAR 2016-17

\$42,177,138

| | |
|--------------|--------------|
| ■ Capital | \$27,565,896 |
| ■ Endowment | \$8,496,645 |
| ■ Expendable | \$6,114,597 |





Tulips bloom around the statue of University founder Rev. Edward F. Sorin, C.S.C.



▶ IMPACT ON PLANNED GIVING

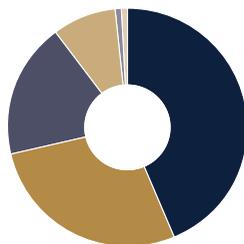


Dr. Tanya Kne '89 and her mother, Tina

DR. TANYA KNE

*Dr. Tanya Kne Charitable Remainder Unitrust
Kne Family Endowment for Undergraduate
Research in Biological Sciences*

Now a chief medical officer with 20 years' experience in emergency medicine, Dr. Tanya Kne '89 says that participating in undergraduate research at Notre Dame played a pivotal role in her decision to go to medical school. "I felt strongly that establishing an endowment for biology research was an important way for me to give back," Kne says. Supplementing the endowment through a charitable remainder trust with the University was a way to create impact far into the future. "The trust allows me to have investment diversification that benefits me during my lifetime, and ultimately Notre Dame. I want to ensure that other undergraduate students have the same type of opportunity that I was afforded."



Gift Planning Cash Totals

FISCAL YEAR 2016-17

\$64,528,497

| | |
|-----------------------------|--------------|
| ■ Bequests | \$28,242,394 |
| ■ Trusts | \$17,851,318 |
| ■ Donor Advised Funds | \$11,880,290 |
| ■ IRA Charitable Rollovers | \$5,515,065 |
| ■ Charitable Gift Annuities | \$525,675 |
| ■ Other | \$513,755 |



APRIL / 2018

| S | M | T | W | T | F | S |
|-----------------------------------|----------------------|----|----|----|-----------------|----|
| 1 Easter | 2 Easter Holiday | 3 | 4 | 5 | 6 | 7 |
| 8 Divine Mercy Sunday | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 Earth Day Notre Dame Day | 23 Notre Dame Day | 24 | 25 | 26 | 27 Arbor Day | 28 |
| 29 | 30 | | | | | |

Gift Planning Support

BY FISCAL YEAR • IN MILLIONS

| Fiscal Year | Cash | Commitments |
|-------------|---------|-------------|
| 12/13 | \$78.62 | \$109.10 |
| 13/14 | \$47.86 | \$186.06 |
| 14/15 | \$54.22 | \$302.99 |
| 15/16 | \$79.73 | \$240.47 |
| 16/17 | \$64.53 | \$355.40 |



New graduates celebrate in front of the Dome



▶ IMPACT ON PRESIDENTIAL PRIORITIES



The Foley family from left: Joe, Kathryn, Mark '87, Dana, Eliza, Ben '19

MARK & DANA FOLEY

Mark and Dana Foley Family Endowment to Support Presidential Priorities

As a fourth-generation Notre Dame family—with a legacy that includes Mark's grandfather playing quarterback for Knute Rockne—Mark '87 and Dana Foley have a deep appreciation for the University's mission. "When considering a gift to Notre Dame, we debated different initiatives that moved us," they recall. "As we spent more time discussing various options, we realized that the University and its leadership were in the best position to steward our gift, just as they had stewarded our education." The Foleys hope that their generous gift of unrestricted funds will inspire others to support programs critical to Notre Dame's distinct educational mission to be a force for good.

MAY / 2018

| S | M | T | W | T | F | S |
|---|--------------------------------------|----|--------------------------|------------------------------------|-------------------------------|-------------------------------|
| | | 1 | 2 Last Day of Classes | 3 | 4 | 5 |
| 6 | 7 Final Exams Through the 11th | 8 | 9 | 10 | 11 | 12 |
| 13 Mother's Day Ascension of the Lord | 14 | 15 | 16 | 17 | 18 Commencement Weekend | 19 Commencement Weekend |
| 20 Commencement Weekend Pentecost | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 Trinity Sunday | 28 Memorial Day | 29 | 30 | 31 ND Alumni Reunion Weekend | | |

"A university community cannot be genuinely Catholic if it seeks to serve only itself. Catholic social teaching insists that we embrace the whole human family, especially those in greatest need."

—REV. JOHN I. JENKINS, C.S.C.—





The sun rises over St. Mary's Lake



▶ IMPACT ON ALUMNI



Marcia, Christa, and Michael Parseghian

CLASS OF 1977

*The Ara Parseghian
Medical Research Fund*

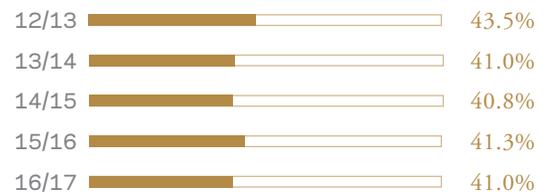
Even years after commencement, classmates can feel like family. Notre Dame's Class of 1977 is no exception. When the time came to decide on a gift for its 40th Reunion, the class chose to support the Ara Parseghian Medical Research Fund in honor of Mike '77 and Cindy Parseghian '77 and the three children they lost to Niemann-Pick Type C disease. In the spirit of love and community, almost 250 classmates contributed to this significant gift in support of a cure.

JUNE / 2018

| S | M | T | W | T | F | S |
|---|--------------------------------|----|----|----------------|-----------------------------------|-----------------------------------|
| | | | | | 1 ND Alumni Reunion Weekend | 2 ND Alumni Reunion Weekend |
| 3 ND Alumni Reunion Weekend Corpus Christi | 4 | 5 | 6 | 7 | 8 Sacred Heart of Jesus | 9 |
| 10 | 11 | 12 | 13 | 14 Flag Day | 15 | 16 |
| 17 Father's Day | 18 Summer Session Begins | 19 | 20 | 21 | 22 | 23 |
| 24 | 25 | 26 | 27 | 28 | 29 | 30 |

Undergraduate Alumni
Participation Rate

BY FISCAL YEAR



▶ IMPACT ON CENTERS AND INSTITUTES

JULY / 2018



Joan and Bob '55 McGrath

**ROBERT P. AND
JOAN M. MCGRATH**

McGrath Institute for Church Life

Robert P. '55 and Joan McGrath have secured the future of a foundational part of Notre Dame's mission and Catholic identity. Bob believes that the newly-named McGrath Institute for Church Life "will become the preeminent, 'go-to' place for creative Catholic content and the formation of Catholic leaders." He cites the institute's dedicated faculty and staff, led by McGrath-Cavadini Director John C. Cavadini, as the basis for his confidence. Often described as a bridge between the University and the Church, the institute seeks to renew the intellectual, spiritual, and liturgical life of the Church and all whom it serves.

| S | M | T | W | T | F | S |
|----|----|----|-----------------------|----|------------------------------|----|
| 1 | 2 | 3 | 4 Independence Day | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 Summer Session Ends | 28 |
| 29 | 30 | 31 | | | | |

“Notre Dame can and must be a crossroads where all the vital intellectual currents of our time meet in dialogue, where the great issues of the Church and the world today are plumbed to their depths, where every sincere inquirer is welcomed and listened to and respected by a serious consideration of what he has to say about his belief or unbelief.”

—REV. THEODORE M. HESBURGH, C.S.C.—





Students enjoy a walk through campus after a visit to the Grotto of Our Lady of Lourdes



▶ IMPACT ON GRADUATE FELLOWSHIPS



The Koo family from left: Maddie, David '93, Vivie, Lesly, and Nathan

DAVID AND LESLY KOO

David and Lesly Koo Fellowship

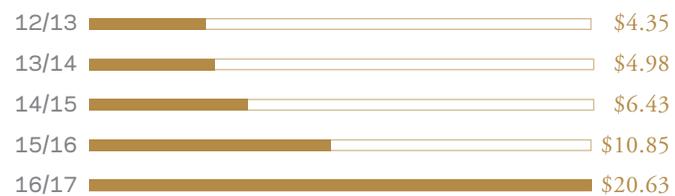
“**N**otre Dame made me a better person,” says David Koo '93, “which is why giving back has always been a top philanthropic priority for my wife, Lesly, and me.” A member of the Graduate Studies and Research Advisory Council, David knows well the impact a fellowship can have on a student pursuing their dreams, which led the Koo family to establish the David and Lesly Koo Fellowship. This fellowship provides necessary support for the research and publishing goals of graduate students in any discipline. As David says, “We have an obligation to support our current students, whether through financial aid or fulfilling basic needs. We have to leave Notre Dame a better place than we found it.”

AUGUST / 2018

| S | M | T | W | T | F | S |
|--------------------------------------|---|------------------------------------|--|----|--------------------------------------|--------------------------------------|
| | | | 1 | 2 | 3 | 4 |
| 5 | 6 <small>Transfiguration of the Lord</small> | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 <small>Assumption of the Blessed Virgin Mary</small> | 16 | 17 <small>Welcome Weekend</small> | 18 <small>Welcome Weekend</small> |
| 19 <small>Welcome Weekend</small> | 20 <small>Welcome Weekend</small> | 21 <small>Classes Begin</small> | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 | |

Gifts to Graduate Fellowships

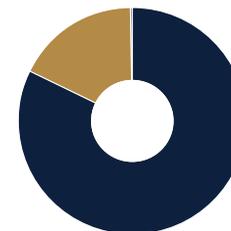
BY FISCAL YEAR • IN MILLIONS • ENDOWED AND EXPENDABLE
• INCLUDES BUSINESS, LAW, AND GRADUATE SCHOOL



Sources of Graduate Aid

FISCAL YEAR 2016-17

\$189,779,063





Street lamps illuminate the Duncan Student Center



▶ IMPACT ON STUDENT LIFE



The Band of the Fighting Irish and the Notre Dame Cheerleaders perform within the Duncan Student Center

DUNCAN STUDENT CENTER

Through the gift of the Duncan Student Center, the Duncan family has created a permanent legacy for students at Notre Dame. Defined by a spirit of entrepreneurship, generosity, and zeal, the Duncan family and their values can be witnessed throughout the new building—from the career center and study spaces, to the exercise facilities and hospitality floors.

Inspired by a shared vision for a new center for student life, the following members of the Notre Dame family have profoundly enriched the lives of students, faculty, and staff through their generosity to the Duncan Student Center:

- The Duncan family, comprising four generations of Notre Dame graduates, for their gift of the Duncan Student Center, a building designed to steward the mind, body, and spirit of each and every student.

- Scott '87 and Loretta Dahnke for their gift of the Dahnke Ballroom, a beautiful space for University and community events with sweeping views of the campus and stadium.

- Tom '60 and Terri Grojean, whose Notre Dame legacy spans three generations, for their gift of the Thomas and Therese Grojean Family Loft, featuring cutting-edge facilities for student media, study, and collaboration.

- Tom '84 and Jeanne Hagerty for their gift of the Hagerty Family Café, a coffeehouse and performance space sure to become a hub of campus culture and fellowship.

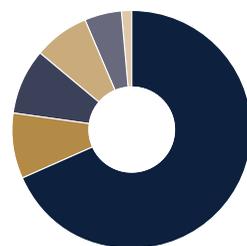
- Notre Dame parents Jan and Marty Hiller for their gift of the Jan and Marty Hiller Midfield Commons, a unique gathering place inspired by the University's storied athletic tradition.

- Bob '79, Carol, Blair '12, and Garrett '18 Rasmus for their gift of the Rasmus Family Club, a premium hospitality space offering thrilling possibilities for Game Day and year-round events.

- Tripp '87 and Sheila Smith, whose family has been part of the University for three generations, for their gift of the Smith Center for Recreational Sports, a two-story recreational center, featuring a suspended running track, NCAA-size basketball court, and other state-of-the-art amenities.

SEPTEMBER / 2018

| S | M | T | W | T | F | S |
|----|--|-------------------|----|----|------------------------------------|---------------------------------|
| | | | | | | 1 Notre Dame vs. Michigan |
| 2 | 3 Labor Day (Classes in Session) | 4 | 5 | 6 | 7 | 8 Notre Dame vs. Ball State |
| 9 | 10 | 11 Patriot Day | 12 | 13 | 14 Exaltation of the Holy Cross | 15 Notre Dame vs. Vanderbilt |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 Notre Dame @ Wake Forest |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 Notre Dame vs. Stanford |
| 30 | | | | | | |



Sources of Gifts to Student Life

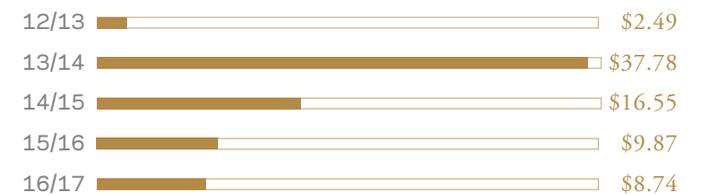
FISCAL YEAR 2016-17 • ENDOWED, EXPENDABLE, CAPITAL, AND GIFTS-IN-KIND

\$8,735,604

| | |
|---------------|-------------|
| Alumni | \$5,993,216 |
| Foundations | \$767,968 |
| Corporations | \$766,470 |
| Parents | \$670,256 |
| Friends | \$418,184 |
| Organizations | \$119,510 |

Gifts to Student Life

BY FISCAL YEAR • IN MILLIONS • ENDOWED, EXPENDABLE, AND CAPITAL





Stained glass globe within the Donald R. Keough School of Global Affairs, commissioned in honor of Marilyn M. Keough



▶ IMPACT ON GLOBAL RELIGIONS



Drs. Zoreen and Rafat H. Ansari

DRS. RAFAT AND ZOREEN ANSARI

Rafat and Zoreen Ansari Institute for Global Engagement with Religion

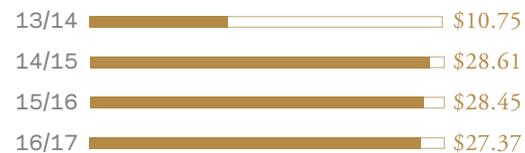
Doctors Rafat and Zoreen Ansari were looking for a way to promote religious equality and respect and saw a unique opportunity in the alma mater of their eldest daughter, Sarah '09 J.D. Notre Dame's mission of advancing integral human development is an ideal shared by many religious traditions, including the Ansaris' own Muslim faith. In support of this common vision, the family has established the Rafat and Zoreen Ansari Institute for Global Engagement with Religion within the Donald R. Keough School of Global Affairs. According to the Ansaris, "Notre Dame is well-positioned to understand and enhance the role of religions and religious people in addressing systemic problems like poverty and violence—something we care about deeply." By illuminating the ways in which faith impacts the world, the institute aims to encourage dialogue and understanding in order to foster the promise of religion as a force for good.

OCTOBER / 2018

| S | M | T | W | T | F | S |
|---------------------------|----|-------------------|-----------------|----|----|--|
| | 1 | 2 | 3 | 4 | 5 | 6 Notre Dame @ Virginia Tech |
| 7 | 8 | 9 Columbus Day | 10 | 11 | 12 | 13 Notre Dame vs. Pittsburgh Notre Dame Founder's Day Mid-Term Break Begins |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 Mid-Term Break Ends | 22 | 23 | 24 | 25 | 26 | 27 Notre Dame @ Navy |
| 28 | 29 | 30 | 31 Halloween | | | |

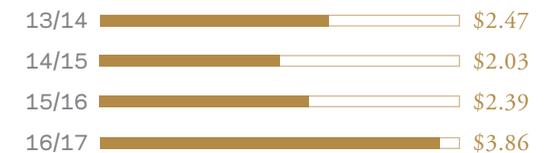
Gifts to the Keough School of Global Affairs

BY FISCAL YEAR • IN MILLIONS • ENDOWED, EXPENDABLE, AND CAPITAL



Gifts to Notre Dame International

BY FISCAL YEAR • IN MILLIONS • ENDOWED, EXPENDABLE, AND CAPITAL





Brilliant fall foliage surrounds the Log Chapel



▶ IMPACT ON ANNUAL GIVING



Frank Loughery '74

FRANK LOUGHERY

Sorin Society

Raised in a devout family with a Notre Dame legacy 20 graduates strong—including his brother Father Bob, rector of Sorin Hall—Frank Loughery '74 believes in the value of a Catholic education. Inspired by his faith in the University's mission, Frank has made gifts every year since graduation, primarily to the Sorin Society. Providing students with the resources needed to reach their highest potential, the Sorin Society truly embodies the ideals of its namesake as "a powerful means for doing good." Today, Father Sorin's legacy is alive and well thanks to individuals like Frank and the students who bear the fruits of this generosity.

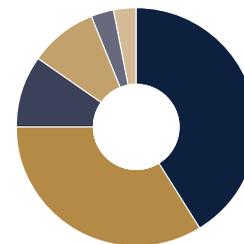
NOVEMBER / 2018

| S | M | T | W | T | F | S |
|-----------------------|----|----|--------------------------|------------------------|--------------------------|------------------------------------|
| | | | | 1 All Saints Day | 2 All Souls Day | 3 Notre Dame @ Northwestern |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 Notre Dame vs. Florida State |
| 11 Veterans Day | 12 | 13 | 14 | 15 | 16 | 17 Notre Dame vs. Syracuse |
| 18 | 19 | 20 | 21 Thanksgiving Break | 22 Thanksgiving Day | 23 Thanksgiving Break | 24 Notre Dame @ USC |
| 25 Christ the King | 26 | 27 | 28 | 29 | 30 | |

Annual Giving Designations

FISCAL YEAR 2016-17

\$52,324,781



- Sorin Society (inclusive of Corby Society).....\$21,558,733
- President's Circle.....\$17,770,851
- Notre Dame Fund.....\$5,091,198
- Rockne Heritage Fund and Expendable Grants-in-Aid.....\$4,771,251
- Law School Annual Fund and Order of St. Thomas More.....\$1,622,681
- Graduate Business Programs and John Cardinal O'Hara Society.....\$1,510,067





The campus Christmas tree brightens a calm winter night



▶ IMPACT ON FAITH IN MISSION



Diane and Don '60 McAllister

DR. DONALD T. AND DIANE MCALLISTER

Don and Diane McAllister Endowment for Excellence in Faith and Justice

A well-respected surgeon with a passion for all things Notre Dame, Don McAllister '60 lived a life devoted to others. To honor her late husband, Diane McAllister established the Don and Diane McAllister Endowment for Excellence in Faith and Justice. "I have enjoyed seeing the impact of our gift reflected in the students here. They are now able to pursue their passions while building the bridge between Notre Dame and the challenges of the world," says Diane. This endowment currently supports the international ministry of Rev. Dan Groody, C.S.C., associate professor of theology and global affairs and director of the Global Leadership Program in the Kellogg Institute for International Studies, and his service work in areas such as migration, refugees, human trafficking, and human flourishing. "Don and Diane's gift has allowed me to truly teach integral human development by showing my students that spirituality and justice go together. Faith, hope, and love ground our research as we work each day to make more visible the invisible heart of God," Father Groody says.

DECEMBER / 2018

| S | M | T | W | T | F | S |
|--------------------------------|------------------------------------|-----------------|----|--------------------------|----|------------------------------------|
| | | | | | | 1 Immaculate Conception of Mary |
| 2 First Sunday of Advent | 3 | 4 | 5 | 6 Last Day of Classes | 7 | 8 |
| 9 | 10 Final Exams Through the 14th | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 Christmas Eve | 25 Christmas | 26 | 27 | 28 | 29 |
| 30 Feast of the Holy Family | 31 New Year's Eve | | | | | |

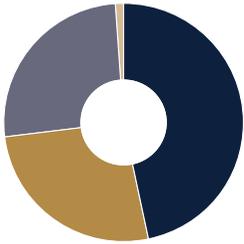
"Our mission is not widely shared in higher education today, but that is why our contribution is so valuable. For if we are afraid to be different, how can we make a difference in the world?"

—REV. JOHN I. JENKINS, C.S.C.—





Financial Overview

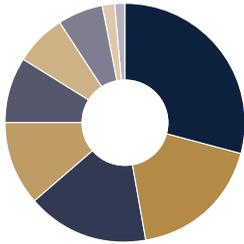


Gift Distribution

FISCAL YEAR 2016-17

\$462,382,235

| | |
|----------------------|---------------|
| ■ Endowment..... | \$215,922,023 |
| ■ Expendable..... | \$123,079,736 |
| ■ Capital..... | \$118,316,566 |
| ■ Gifts-In-Kind..... | \$5,063,910 |

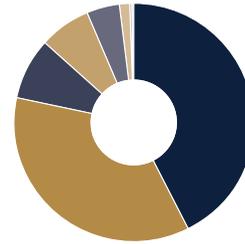


Endowment Gifts

FISCAL YEAR 2016-17

\$215,922,024

| | |
|---|--------------|
| ■ Scholarships..... | \$63,003,578 |
| ■ Undesignated Endowment..... | \$39,371,431 |
| ■ Academic Program Support..... | \$35,541,558 |
| ■ Professorships..... | \$24,163,957 |
| ■ Fellowships..... | \$19,075,742 |
| ■ Other Endowment..... | \$15,486,830 |
| ■ Department Discretionary Funding..... | \$12,704,713 |
| ■ Rectorships and Coaches..... | \$4,090,697 |
| ■ Directorships..... | \$2,483,518 |

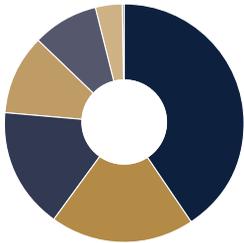


Expendable Gifts

FISCAL YEAR 2016-17

\$123,079,736

| | |
|---|--------------|
| ■ Academic Program Support..... | \$52,517,409 |
| ■ Unrestricted..... | \$43,934,198 |
| ■ Department Discretionary Funding..... | \$10,159,238 |
| ■ Other Expendable..... | \$8,734,039 |
| ■ Scholarships..... | \$5,451,439 |
| ■ Fellowships..... | \$1,940,913 |
| ■ Directorships..... | \$247,500 |
| ■ Professorships..... | \$95,000 |

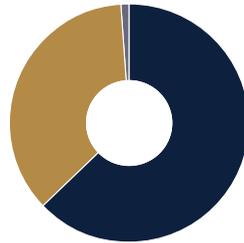


Sources of Cash Receipts

FISCAL YEAR 2016-17

\$462,279,789

| | |
|---|---------------|
| ■ Alumni..... | \$188,732,075 |
| ■ Foundations..... | \$89,020,552 |
| ■ Non-Alumni Parents..... | \$75,995,120 |
| ■ Corporations..... | \$50,543,308 |
| ■ Friends..... | \$40,757,045 |
| ■ Other Organizations..... | \$16,997,609 |
| ■ Holy Cross and Other Religious Organizations..... | \$234,080 |



Cash Receipts by Gift Type

FISCAL YEAR 2016-17

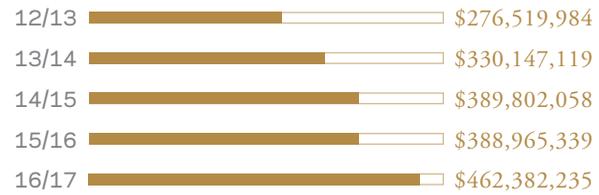
\$462,382,235

| | |
|---|---------------|
| ■ Pledge Payments..... | \$290,973,090 |
| Cash gifts directed to existing commitments | |
| ■ Outright Gifts..... | \$167,557,968 |
| Cash gifts not connected to a pledge | |
| ■ Matching Gifts..... | \$3,851,177 |
| A corporate or foundation cash gift that matches an employee gift | |



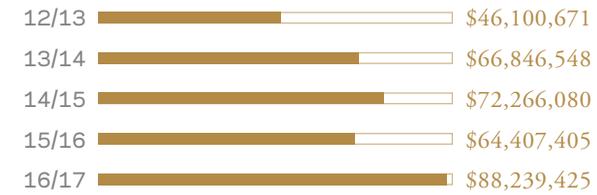
Cash Receipts by Fiscal Year

BY FISCAL YEAR



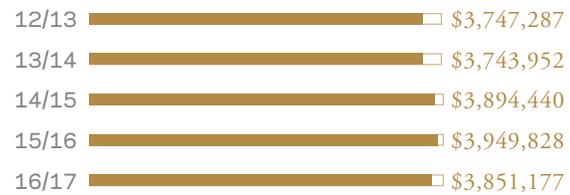
Foundation Support

BY FISCAL YEAR • INCLUDES FAMILY FOUNDATIONS



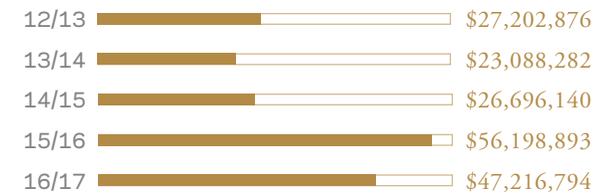
Matching Gifts

BY FISCAL YEAR



Corporate Support

BY FISCAL YEAR



In fiscal year 2016-17, the cost of fundraising was 10 cents of each dollar raised.

*“This is the Notre Dame of the 21st century:
We are a place of higher learning that plays host to world-
changing teaching and research, but where technical knowledge
does not outrun moral wisdom, where the goal of education has
been and always will be to help students live a good human life,
where our restless quest to understand the world not only lives in
harmony with faith, but is strengthened by it.”*

—REV. JOHN I. JENKINS, C.S.C.—





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2017–2018

University of Notre Dame Stewardship Report



“One hundred and seventy-five years ago, Father Edward Sorin, C.S.C., our founder, proclaimed this bold vision: to establish a university dedicated to Our Lady that would serve this new land—a ‘powerful means for doing good,’ as he put it. When a great fire in the Main Building reduced that vision to a pile of smoldering bricks some thirty years later, an undaunted Father Sorin again acted boldly, this time vowing to rebuild Notre Dame ‘bigger and better than ever.’”

— REV. JOHN I. JENKINS, C.S.C., PRESIDENT

There's no place like Notre Dame.

Our distinguished programs in the arts, sciences, and humanities are thriving, drawing on nearly two centuries of tradition, while our residence halls, athletics programs, service initiatives, and state-of-the-art learning spaces continue to foster community and personal growth. In addition, our renewed dedication to expanding financial aid aims to ensure that every deserving student will have the opportunity to pursue their Notre Dame education, no matter their social or economic background.

Across the University, we aspire to seek God, study the world, and serve humanity, striving to be ever faithful to our Catholic identity and our Holy Cross calling to make God known, loved, and served.

The generosity of the Notre Dame family—alumni, parents, students, friends, and faculty—is the foundation of everything we do. We are a better and stronger Notre Dame because you boldly dedicate your time, talent, and resources to strengthening our mission of service and scholarship.

This report contains only a handful of the innumerable stories the ND family has to tell, but it is our hope that reading them will give you a glimpse of the achievements we can reach together.

I am humbled and inspired by your commitment to Notre Dame. You have my heartfelt thanks.

Yours in Our Lady,



LOUIS M. NANNI

Vice President for
University Relations

The Promise of Stewardship

—
Gifts will be acknowledged in a timely and personal manner by University leadership.

—
A gift accepted with a restricted purpose will be used for that purpose. Annual impact reports will be shared with benefactors who have established an endowment at the University.

—
The value of any substantial benefits resulting from a gift will be reported to the benefactor.

—
Gifts will be accounted for using generally accepted accounting principles, which will provide consistent, timely, and accurate reporting of all gifts into the University's official financial record.

—
Appropriate and consistent recognition will always be given to the benefactor; recognition of a public nature will first be approved by the benefactor.

The Academy



Bradley M. Keegan

“The Warren Family Research Center for Drug Discovery and Development is training the next generation of scientists to discover innovative ways to improve health care around the world. Thanks to the resources provided by the Warren Center, I am receiving hands-on experience designing, synthesizing, and evaluating pharmaceuticals to treat Alzheimer’s and Parkinson’s diseases. I feel blessed to be surrounded by top-level researchers and tools, both of which are helping me come closer to achieving my personal goal of improving treatment options for individuals with neurological and mental health disorders, all thanks to benefactors like you!”

Raymond and Celeste Biagini Endowments for Excellence in International Law and Politics & in Political Theory in honor of Gerhart Niemeyer

As he first sat in Professor Gerhart Niemeyer’s undergraduate political theory class, Double Domer Ray Biagini ’76, ’79 J.D., could not have foreseen the impact the beloved professor of government would have on his life. After escaping Nazi Germany in 1933, Niemeyer, a renowned political philosopher, spent his life advising government officials, writing, and teaching at Notre Dame. Niemeyer would be a powerful force in Ray’s education and growth, imparting both cutting-edge academic instruction and principles to live by.

“He influenced me so much,” Ray says, “that I wanted to make sure the University had the ability to keep his thoughts and writings alive for as long as possible, so that more students could experience his teaching.” Ray and his wife, Celeste, chose to establish two Endowments for Excellence in honor of Professor Niemeyer: one supports the College of Arts and Letters; the other strengthens the Law School.

“We felt that these two schools were uniquely positioned to carry forward his legacy and thinking,” Ray continues. “We also felt that by supporting two schools rather than one, we would have a greater impact and reach more students over time.”



The Biagini family from bottom left: Anthony, Cecilia ’20, Jonathan ’20. From top left: Nichole (Best) ’10, Nicholas ’11, Celeste, Raymond ’76, ’79



Jack and Catherine Scholl with Father Hesburgh in 1986

Dr. Scholl Foundation

While building his international foot care brand into a household name, William M. Scholl, M.D., sought to parlay his financial success into a means for helping others. In 1947, he established the Dr. Scholl Foundation, to which he left the bulk of his estate at the time of his passing. Mr. Jack Scholl, William’s nephew, led the Foundation from 1980 until 1994. During that time, the Foundation’s relationship with Notre Dame grew in large part due to the friendship between Jack and Rev. Theodore M. Hesburgh, C.S.C. Trusting in his judgment and leadership, Jack would often call on Father Hesburgh to ask what University initiatives were in greatest need of support. Jack’s daughters, Pam Scholl and Anne Scholl Moseley, continue the legacy of giving as the current directors of the Dr. Scholl Foundation.

The Dr. Scholl Foundation supported undergraduate scholarships from 1984 to 2014, supporting countless students in need of funds to attend Notre Dame. The Foundation has created two endowed professorships—the Dr. Scholl Professor of International Affairs in 1985, and the Dr. Scholl Professor of Romance Languages and Literatures in 1995. They continued their giving by establishing the Dr. Scholl Foundation Endowment for Excellence in Applied Nuclear and Medical Physics in 2016, and have most recently supported the expansion of the Warren Family Research Center for Drug Discovery and Development with a 2017 grant for the first robot to perform drug assays at the University.

To this day, the Notre Dame family is blessed to count the Dr. Scholl Foundation and the Scholl family among its friends and benefactors, willing and able to bolster the University’s distinctive mission.

Financials

GIFTS TO THE ACADEMY

Fiscal Year 2017–18/Endowed, Expendable, Capital, and Gifts-in-kind

Total: \$169,458,555

| | | |
|--|--|---|
| College of Arts & Letters \$34,522,835 | College of Engineering \$14,873,333 | Law School \$9,671,754 |
| Mission \$19,119,623 | College of Science \$13,724,242 | Mendoza College of Business \$8,040,034 |
| Provost’s Office \$18,917,367 | Keough School of Global Affairs \$12,905,048 | School of Architecture \$6,590,017 |
| Arts \$15,058,211 | Office of Research \$10,192,782 | Hesburgh Libraries \$3,417,010 |

GIFTS TO PROFESSORSHIPS AND DIRECTORSHIPS

By Fiscal Year/In Millions/Endowed Gifts Only

| | | |
|---|-------|----------------|
| Graduate School \$1,503,431 | 13/14 | \$15.42 |
| Provost–Undergraduate Studies \$611,745 | 14/15 | \$16.48 |
| First Year of Studies \$311,123 | 15/16 | \$17.12 |
| | 16/17 | \$26.65 |
| | 17/18 | \$27.49 |

Presidential Priorities



Odalis Gonzalez '21

"If not for the financial aid from the University and its amazing benefactors in the President's Circle, I would never have had the chance to open the door to a new life. Thank you for helping give a first-generation college student from a small town a chance to follow her dreams and live an experience that will forever change her for the better. I will forever be thankful for the opportunity to attend the university of my dreams without financial restraint."

President's Circle Scholarship Recipient

President's Circle

“The world needs more Notre Dame in it,” say Perry ’87 and Sue Dellelce, two members of the Notre Dame family keeping the Irish spirit strong in their native country of Canada. “Notre Dame is a recognizable name and brand worldwide, but its true purpose, and what makes it such a special place, is not always articulated outside the United States and certainly not well enough in Canada. This is why Sue and I continually spread the Notre Dame mission in Canada,” Perry says. “I am deeply grateful for all of the opportunities the University has provided me—spiritually, personally, and professionally—and we are honored and privileged to be able to give back to this amazing institution.”

Over the years, the Dellelce family has strengthened financial aid through the endowment of three MBA fellowships in the Mendoza College of Business: one in memory of Perry’s mother, Diane; one honoring Frank Reilly, former dean of the College of Business, and his wife, Therese; and one

with the MBA Class of ’87. In addition to an estate gift and their membership in the President’s Circle, Sue and Perry have supported Notre Dame Athletics and the Fighting Irish Hockey program through the Dellelce Irish Hockey Shop and the Perry and Mark Express Zamboni, which was named in partnership with Perry’s friend and classmate Mark Brostowski.

Perry and Sue both feel that the President’s Circle has helped them engage on a deeper level with fellow members and leaders of the Notre Dame community. “We are aware of the value of unrestricted funds, and we have the utmost respect for Father John,” the couple explains. “It is wonderful to provide him with the opportunity to move campus priorities forward.”



The Dellelce family from left: Nicholas, Sue, Taylor, and Perry ’87



Willett family from left: Alice Kate ’19, Kent ’16, Sue, Daniel ’18, and Nick ’75



MacDonell family from left: Eldred ’84, Keith ’17, Patrick ’13, Liz ’84, Alec ’14, and Keegan ’22

President's Circle

“Come spring 2022, every member of the MacDonell family will have a Notre Dame degree. Eldred ’84 and Liz ’84, who met as students, and their four sons have all called this campus home. Today, through their dedicated membership in the President’s Circle, the MacDonells are happy to give back to the place that has been a constant for them throughout their lives.

“We know that budgets are drawn up in advance,” explain the MacDonells, “and the President’s Circle allows Father Jenkins to take care of pressing issues that arise during the course of the year or to address the issues he feels need the most attention.”

The family hopes that the students who benefit from their giving will pay it forward. “We receive statements on how the funds from the President’s Circle members are allocated,” say the MacDonells, “and there is so much good done with the money that the impact is tangible. One of the things Father Jenkins consistently likes to strengthen is financial aid, and since we think Notre Dame is a very special place, we are happy to help other students attend this great University.”

Cavanaugh Council

“For Nick ’75 and Sue Willett, joining the Cavanaugh Council of the President’s Circle was an ideal way to reconnect with Notre Dame after many years. “Getting involved with the Cavanaugh Council allowed us to become fully reacquainted with the University, its current leadership, and how we could best help students in their undergraduate careers as they prepare for life after the Dome,” the Willetts explain.

Having all three of their children attend Notre Dame led Nick and Sue to realize

just how critical student internships can be for securing work after graduation. They have since become strong supporters of the Career Center, the mentorship program, and the summer internship program in California, where they reside. “We want to help students take full advantage of their education and get to the finish line with a job,” says the couple. “A lot of these kids cannot afford to accept an internship; rent eats up all of their earnings, and they need to make some money to fund the rest of their academic year. We feel blessed to be able to help so many students by funding their internships.”

“At Notre Dame, we are driven by a whole-hearted commitment to uniting two indispensable and wholly compatible strands of higher learning: academic excellence and religious faith ... we must send forth graduates who will be intellectual and moral leaders for our time.”

Internationalization



Gabrielle Brookins '19

"My study abroad experience really showed me that despite any prior travel, there is so much more of the world I have yet to see. I was lucky to have this opportunity during my time at Notre Dame. Studying abroad has helped me learn so much about myself and grow as a person. I feel more confident in myself and open to the unknown and unexpected. I hope to travel back to Brazil and to many more places in my future."

NDI study abroad experience in Rio de Janeiro, Brazil



Klau family from left: Kevin '96, Erin '96, Richard, Molly, and Rick with Rev. John I. Jenkins, C.S.C.

Klau Center for Civil and Human Rights

For Rick and Molly Klau, philanthropy is a family affair. “We believe strongly in giving back,” Rick says, adding that the couple seeks to lead by example, inspiring their children, grandchildren, and later generations to make giving part of their lives.

The Klaus began their relationship with Notre Dame when their son Kevin '96 was an undergrad, and his marriage to classmate Erin (Gallagher) '96 only strengthened the connection. Rick and Molly have dedicated their time and resources to many University initiatives, including volunteering with the Gigot Center for Entrepreneurship (now part of the IDEA Center), serving on the Hesburgh Libraries Advisory Council, and creating a scholarship and two Endowments for Excellence.

Called to seek even more impactful ways of serving those less fortunate than themselves, the family began a process of discernment. “We truly felt the presence of the Holy

Spirit guiding our consideration and deliberation,” Rick says. Those deliberations resulted in the creation of the Klau Center for Civil and Human Rights to advance the inherent dignity of all human beings.

Now a constituent member of the Keough School of Global Affairs, the Center for Civil and Human Rights was founded in 1973 by Rev. Theodore M. Hesburgh, C.S.C., as a way of carrying on the work he had helped begin while serving on the U.S. Commission on Civil Rights.

“The Center’s fundamental focus is to bring scholarship, research, and advocacy to the area of civil and human rights, all informed by Catholic social teaching,” says Rick. “This endowment is a way of putting our faith into action, married with core values our family embraces. In the long term, we hope to motivate students, academics, and practitioners around the world to challenge the status quo wherever the oppressed and underserved need a voice.”



Ashi and Tejal Parikh

Parikh Family Endowment for Excellence for Notre Dame International

A lot of learning happens outside of the classroom in this day and age,” says Ashi Parikh, “and we want students to have the opportunity to be more aware of the global world, to be exposed to different worldviews and cultures.” In order to give more students this kind of international experience, Notre Dame parents Ashi and Tejal Parikh established the Parikh Family Endowment for Excellence for Notre Dame International (NDI). Currently, 75% of students study outside the United States with NDI during their undergraduate careers. The Parikhs hope that their gift will lift that number even higher.

“Our hope is that when students study abroad, they will experience the culture, not just study there,” they explain. “Everyone views life through a different lens, and the more you travel, the more lenses you have available to you.” Developing broader worldviews will allow students to bring more variables into their thinking, leading to better, more informed decision-making as they take on future roles in leadership and service.

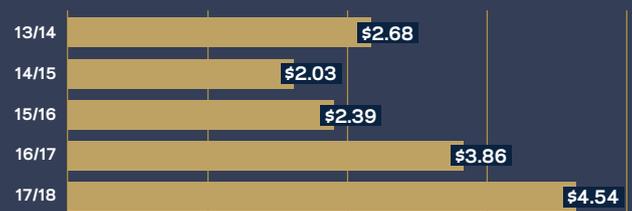
“We do not want students to miss out on a life-changing experience for lack of resources,” Ashi says.

Financials

“We teach human dignity best by serving it where it is most likely to be disregarded, in the poor and abandoned.”

Rev. Theodore M. Hesburgh, C.S.C.

GIFTS TO NOTRE DAME INTERNATIONAL
By Fiscal Year/In Millions/Endowed, Expendable, and Capital



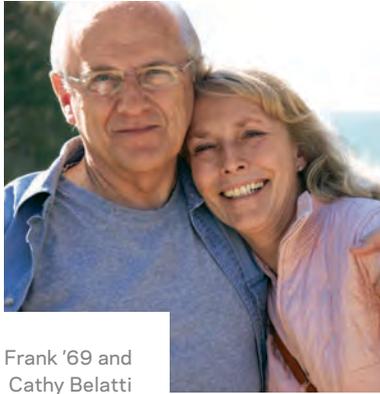
Financial Aid



Lester Polty '20

"As a low-income student, one of my greatest worries was funding my education. However, God blessed me with an unparalleled support system here at the University, and I am so grateful to have been selected as the first recipient of the Hank Aaron Chasing the Dream Scholarship. Receiving this scholarship has afforded me opportunities I never thought possible and has propelled me forward academically, personally, and professionally. Through this support and investment in my future, I have been able to continue chasing my dreams."

Lester Polty '20, middle, the first Hank Aaron Chasing the Dream Scholarship recipient, pictured above with Frank Belatti and Hank and Billye Aaron



Frank '69 and Cathy Belatti



Dr. Rania Mohammed (middle), the first recipient of the Okanlami Family Fellowship, pictured with Dr. Feranmi Okanlami (left) and Dr. Bunmi Okanlami (right)

Okanlami Family Fellowship

In 2008, after building an accomplished career as a pediatric physician, Dr. Bunmi Okanlami earned an Executive MBA from Notre Dame. Her son Feranmi, also a physician, followed suit in 2015 when he graduated from the University's Entrepreneurship, Technology, and Innovation (ESTEEM) master's program. "We both benefited personally and professionally by pursuing degrees outside of the medical field," says Bunmi. "It made us better advocates for our patients, giving us knowledge and tools for innovation we could apply toward solutions in medicine. We decided that we wanted to provide other health care professionals the same opportunity."

Together, Bunmi and Feranmi established the Okanlami Family Fellowship, offering support to health care professionals serving medically underserved areas in their pursuit of a degree through ESTEEM.

"I have to give ESTEEM a lot of credit for a lot of the opportunities I've had," says Feranmi. "I conceptualize things a different way. I go after opportunities more. I'm always thinking about how I can do the next thing. It's that entrepreneurial spirit that ESTEEM has helped to nourish."

The fellowship's first recipient, Dr. Rania Mohammed, has taken her ESTEEM education back home to Ethiopia, where she strives to improve the health care system through her work as a hospital administrator. Bunmi has visited Rania multiple times, helping to evaluate the hospital's pediatric programs and train its staff in pediatric critical care.

"The ESTEEM program has opened doors and broadened perspectives," says Bunmi, "and we are excited to be able to impact health care professionals and systems all around the world."

Hank Aaron Chasing the Dream Scholarship Endowment

Frank Belatti '69 has a Notre Dame story that began long before his birth. His grandfather, an Irish immigrant to the United States, dreamed that his grandson would one day join the Fighting Irish at the University of Notre Dame. Frank's mother relayed the message, and he was inspired to pursue his grandfather's vision, applying to the University at the age of 11. In return for his application, the Admissions Office sent a brochure and a note encouraging him to apply again after graduating high school.

That brochure hung on Frank's wall for the next seven years. As time passed, expectations grew. When the day came to reapply, Frank feared that he might receive a negative response. So, after filling out the application, he left it under his bed. Later, when he had decided to attend another university, Frank's mother called him in tears. He had been accepted to Notre Dame. She had found the application and mailed it herself.

His grandfather's dream had come true. In order to thank his parents for their inspiration, sacrifice, and belief in him, Frank later endowed two scholarships, one in each of their names. He takes great pride in knowing that these scholarships in memory of his parents will continue to give immigrants and their children the gift of a Notre Dame education for

generations to come. "When you create a perpetual scholarship," Frank says, "the signed agreement states that 'for as long as there is a Notre Dame, this scholarship will be in place.' It is a humbling feeling to know that you have given to something that will extend beyond your lifetime."

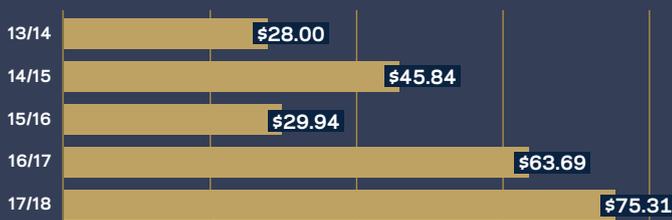
Frank's support of financial aid has only grown since establishing those first endowments. Most recently, he created the Hank Aaron Chasing the Dream Scholarship in honor of his dear friend and business partner: Major League Baseball legend Hank Aaron. "Hank is a remarkable individual who always tries to help people," Frank says, "and we wanted to create a permanent program in recognition of his enormous athletic and personal achievements and in honor of his love for Notre Dame."

"Investing in the future of young people provides copious dividends," Frank says, "and my hope is that each recipient will pay it forward someday." In August, after watching two of his sons attend Notre Dame, Frank saw his first grandson move to South Bend to become a "Fighting Irishman" himself. "The dream my grandfather had many years ago," Frank continues, "has impacted more people than he ever could have imagined."

Financials

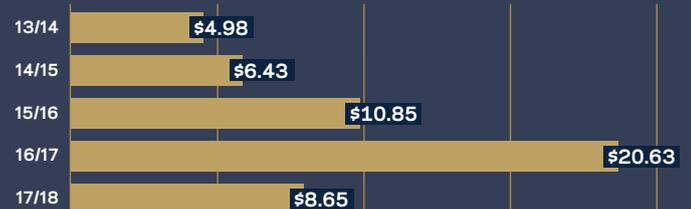
GIFTS TO UNDERGRADUATE SCHOLARSHIPS

By Fiscal Year/In Millions/Endowed and Expendable



GIFTS TO GRADUATE FELLOWSHIPS

By Fiscal Year/In Millions/Endowed and Expendable includes Business, Law, and Graduate School



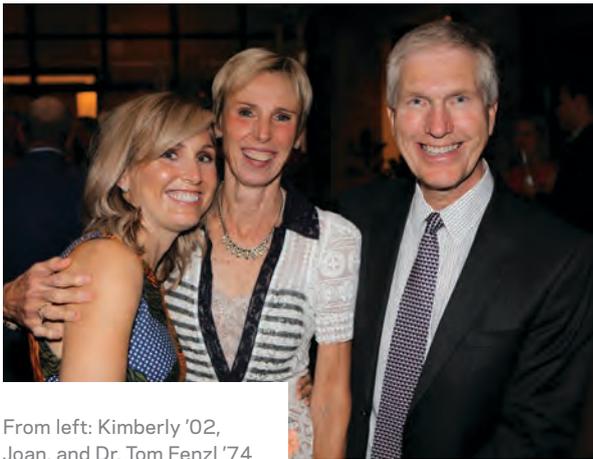
Annual Giving



Michelle Casas '21

"As the first person in my family to graduate high school and receive a higher level of education, being at Notre Dame means a tremendous amount to my entire family. An education is one of the greatest gifts in life, and it is a reality for me today because of you. I promise to make the most of my time here and give back to others, like you have given to me. Go Irish!"

Sorin Society Scholarship Recipient



From left: Kimberly '02, Joan, and Dr. Tom Fenzl '74

Sorin Society

Tom '74 and Joan Fenzl have been loyal members of the Sorin Society since 1991. When he arrived on campus his freshman year, Tom did not feel prepared for the academic and social challenges of University life. Yet, with the help of his campus community and a talented math tutor—a graduate student from Ireland—he made it through, and the lessons he learned along the way enabled him to thrive in medical school.

The Fenzls give to the Sorin Society because they know that a supportive environment is a critical part of student success. According to Tom, Sorin “does a great job of enhancing the student experience, providing financial aid, and meeting the greatest needs of the University and, ultimately, the students. My hope is that through our giving, we are helping another student at Notre Dame succeed. I’m happy to have the opportunity to give back to the place that gave so much to me.”

Rockne Athletics Fund

I believe that quality individuals can become quality student-athletes,” says Dave Mancinelli. “If you are committed to something like academics and athletics at Notre Dame, you can excel in every other part of life, and I want to help as many students on that journey as possible.”

Dave considers himself an alumnus in spirit. This year marks the 40th anniversary of his first visit to campus, and while he admits that his love for Notre Dame began with football, today his relationship with the University goes deeper. “Notre Dame is so much more to me now,” he explains, “and I have the Rockne Athletics Fund to thank for that. I now have Notre Dame friends all over the country, I have been exposed to every sport offered at the University, and I look forward to all of the events Rockne hosts throughout the year.”

Every time Dave is on campus, he meets at least one student-athlete who thanks him for making their Notre Dame experience possible. “Everyone should know that you don’t have to be a sports fan to support the Rockne Athletics Fund,” he says. “It is about much more than that. It’s about investing in these amazing students and their futures. It’s about the people you meet, and about being a bigger part of such a special place. Plus, all of the events are well worth your time!”



Dave Mancinelli and his son, David



Alex Lebedev '18

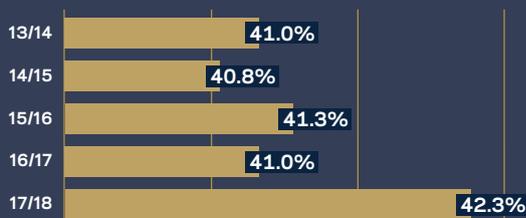
Men’s Tennis, Rockne Athletics Fund Scholarship Recipient

“Thank you, Rockne Athletics Fund members, for all you do, and for all you provide to student-athletes at Notre Dame. It’s been a wonderful experience for me and my teammates on the tennis team these last few years, and I’m sure I speak for the many other athletes I see around campus every day! Hopefully one day I’ll be able to give back and help other talented athletes attend such a fine university!”

Financials

UNDERGRADUATE ALUMNI PARTICIPATION RATE

By Fiscal Year

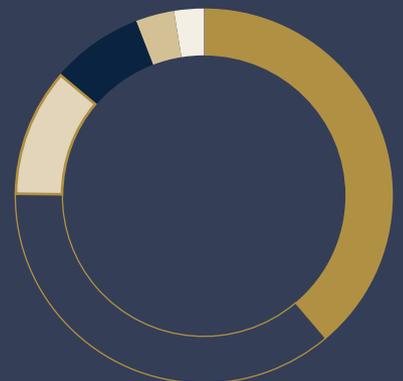


ANNUAL GIVING DESIGNATIONS

Fiscal Year 2017–18

Total: \$57,090,400

- Sorin Society (inclusive of Corby Society) **\$22,131,637**
- Notre Dame Fund **\$4,531,958**
- President’s Circle **\$20,812,128**
- Law School Annual Fund and Order of St. Thomas More **\$1,888,439**
- Rockne Athletics Fund and Expendable Grants-in-Aid **\$6,275,503**
- Graduate Business Programs and John Cardinal O’Hara Society **\$1,450,735**



Athletics



Justin Plaschka '18

"I want to show my gratitude and appreciation for the donations to the University that have allowed a student like me to attend such an amazing school. Your generosity has not only allowed me to thrive in the pool, but also graduate with a degree in marketing from the University of Notre Dame. You have had such a significant impact on turning me into the person I am today."

Grant-in-Aid Recipient, Men's Swimming & Diving



Luli and Jim '81 Montagano surround their daughter, Alessandra, and her new husband, Nick Bilardello, outside St. Patrick's Cathedral at their wedding in May 2017

Montagano Family Baseball Grant-in-Aid

“Growing up in Elkhart, Indiana, it was always my dream to attend Notre Dame,” says Jim Montagano '81, “and in the spring of 1977, I had the good fortune of receiving an athletic scholarship to play baseball at Notre Dame.” During his time on campus, Jim’s parents became devoted fans and supporters of the baseball program. His mother, Mary, was even made an honorary Monogram recipient for her many contributions.

Years later, the Montagano family was touched by tragedy when Jim and his wife, Luli, lost their 9-year-old son, Tony, as a result of a car accident. Their faith was significantly tested. Many nights after work, Jim would make the three-hour drive from Detroit to South Bend to pray at the Grotto, knowing that his

family needed God’s wisdom, strength, and support. “After many hours spent in prayer and self-reflection in the pews at the Basilica and numerous candles lit at the Grotto, our family grew stronger than ever,” says Jim. “I can honestly say that Our Lady’s impact was ‘tender, strong, and true.’”

In honor of Tony, Jim and Luli established the Montagano Family Baseball Grant-in-Aid. Sustaining the family’s tradition of benefaction toward the program, their gift helps ensure that Irish Baseball can continue to recruit top talent and support student-athletes.

“Notre Dame is an amazingly powerful place,” Jim says, “and we are thankful to be able to give back to the baseball program that helped shape me and to the place that brought us through our greatest loss.”

John Hatherly–Joe Piante Head Track and Field Coach

John Hatherly '82, who came to Notre Dame on a track and field scholarship, says, “As someone who would otherwise not have been able to afford to attend a college such as Notre Dame, I continually reflect on the unparalleled education and guidance I received while attending the University.”

The individual who made the greatest impact on John during his undergraduate days was Joe Piante, now-retired head coach of the men’s cross-country and men’s and women’s track and field programs. Over the course of his 39 years at Notre Dame, Coach Piante put a tremendous amount of work into building up these sports on campus.

As a way to honor his former coach and strengthen the sport and University he

loves, John and his wife, Christina, chose to establish an endowment for the John Hatherly–Joe Piante Head Track and Field Coach, providing long-term stability and resources for the program. Endowed track and field coaching positions are rare, making the Hatherly family’s gift a truly distinctive gesture.

“As someone who has been fortunate to achieve some success in life, I felt it was deeply important to give back to my alma mater, as this university helped shape me and ultimately put me on the path to where I am today. Christina and I feel blessed to be able to endow this position, and naming it for Joe Piante felt like a very natural and appropriate way to honor his shining example as someone who, for over 30 years, dedicated his life and talents to shaping other athletes like me.”



Hatherly family from left: Celine, Sean, Christina, and John '82

Financials

GIFTS TO ATHLETIC GRANTS-IN-AID

By Fiscal Year/In Millions/Endowed and Expendable



GIFTS TO ATHLETICS

Fiscal Year 2017–18

Total: \$90,070,798

- Capital \$68,467,692
- Endowment \$14,362,748
- Expendable \$7,240,358



Planned Giving



Prayer of Rev. Theodore M. Hesburgh, C.S.C.

Come Holy Spirit, fill the hearts of your faithful and kindle in them the fire of your love. Send forth your Spirit and they shall be created. And You shall renew the face of the earth. O God, who by the light of the Holy Spirit did instruct the hearts of the faithful, grant that by the same Holy Spirit we may be truly wise and ever enjoy His consolations,

Through Christ Our Lord,
Amen.



Chuck and Debbie Finkbiner

Morelli family from left: Lola, Mike '93, Sofia, Andrea '96, and Dominic



Morelli Family Center for Social Concerns Endowment for Excellence

Mike '93 and Andrea '96 Morelli believe in Notre Dame's mission—its commitments to education and research, to the development of the whole person, and to upholding the principles of the Catholic Church. “We both grew so much academically and spiritually by attending the University that we wanted to give back financially,” the couple explains.

The Morellis chose to include Notre Dame in their estate plans with a bequest to establish the Morelli Family Center for Social Concerns Endowment for Excellence. As an undergraduate, Andrea participated in a summer service project through the Center. It was a touching experience that inspired her and her husband to support the Center's work.

“This bequest allows the University to plan for the future, provides tax advantages for us, and will continue growing as our assets grow,” Mike says. “We believe Notre Dame can be a world leader in the area of social justice, and our hope is that the University can leverage this gift to help as many people as possible.”

Finkbiner/Hanrahan Endowment for Excellence

Chuck and Debbie Finkbiner have chosen to support Notre Dame over the years because of its tradition of excellence in education, athletics, and ethical leadership. “With its 176-year history of devotion to Jesus and Our Lady, this is an institution that aligns with our values,” the couple says. “Though neither of us are graduates, we are devoted friends of Notre Dame who wholeheartedly believe in the mission and vision of this great University.”

Among the many ways the Finkbiners have chosen to show their support is through a planned gift. Their future bequest to establish the Finkbiner/Hanrahan Endowment for Excellence will provide for

the long-term upkeep and preservation of the Basilica of the Sacred Heart. “With this planned gift,” the Finkbiners explain, “the University will be able to ensure that the Basilica and the Grotto of Our Lady of Lourdes are forever part of the landscape and spiritual life of this campus, which is very important to us.” In addition to their future endowment, Chuck and Debbie are annual supporters of the Center for Ethics and Culture in its work to address moral and ethical leadership. “We also support the Rockne Athletics Fund annually,” Chuck says, “as it helps to ensure that the student-athletes have the resources to continue striving for excellence on and off the field. Coach Rockne has always been an

inspiration to me, whose humble excellence I have tried to emulate in business—always reaching for excellence, many times failing, but never settling for less than the best.”

Throughout their many years of giving, Chuck and Debbie have turned to prayer for guidance on how and where to allocate funds. “Prayer led us to Our Lady's University,” the couple says. “Like Notre Dame, we dream boldly. We see a future where this institution continues to do good in the world. We are blessed to be part of the story being written every day on campus and around the world. We are at peace knowing that our impact through this great University will live on for generations to come.”

Financials

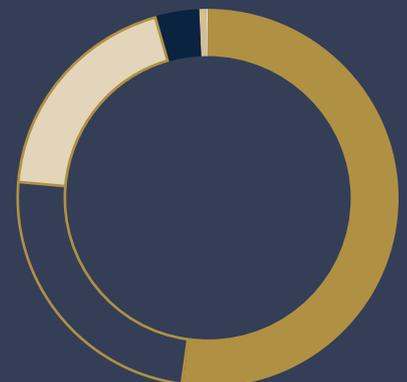
GIFT PLANNING SUPPORT By Fiscal Year/In Millions



GIFT PLANNING CASH TOTALS Fiscal Year 2017–18

Total: \$100,635,366

- Bequests \$52,441,020
- Charitable Gift Annuities \$633,514
- Donor Advised Funds \$24,376,242
- Other \$82,528
- Trusts \$19,338,616
- IRA Charitable Rollovers \$3,763,446



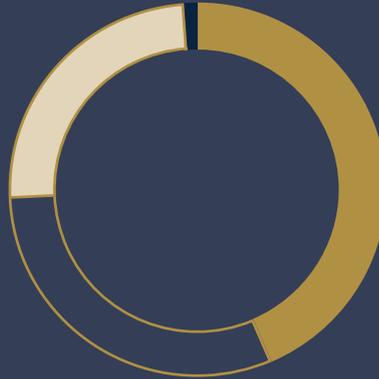
Financial Overview



GIFT DISTRIBUTION
Fiscal Year 2017–18

Total: \$515,725,888

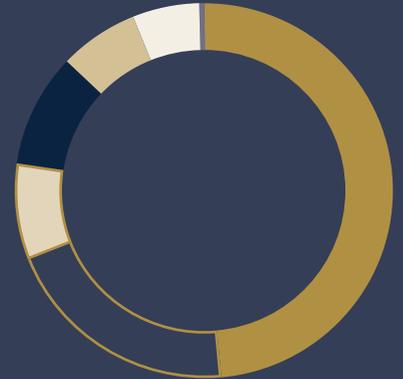
- Endowment
\$224,734,869
- Capital
\$157,977,122
- Expendable
\$127,051,464
- Gifts-in-Kind
\$5,962,433



SOURCES OF CASH RECEIPTS
Fiscal Year 2017–18

Total: \$515,725,888

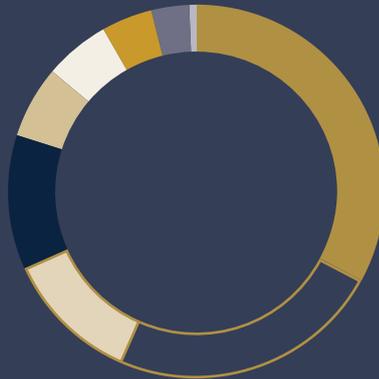
- Alumni
\$250,214,730
- Foundations
\$105,758,216
- Corporations
\$43,045,726
- Non-Alumni Parents
\$50,275,052
- Friends
\$34,890,954
- Other Organizations
\$29,496,060
- Congregation of Holy Cross and Other Religious Organizations
\$2,045,150



ENDOWMENT GIFTS
Fiscal Year 2017–18

Total: \$224,734,870

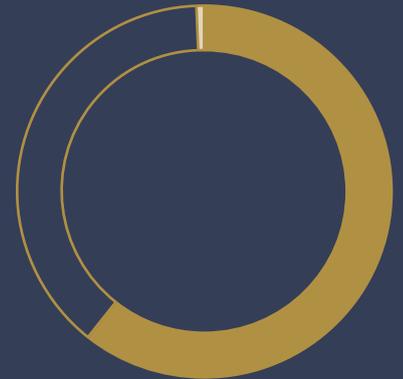
- Scholarships
\$73,640,514
- Undesignated Endowment
\$53,322,790
- Academic Program Support
\$26,562,944
- Professorships
\$26,048,141
- Department Discretionary Funding
\$14,000,280
- Other Endowment
\$12,632,111
- Rectorships and Coaches
\$9,790,264
- Fellowships
\$7,296,060
- Directorships
\$1,441,766



CASH RECEIPTS BY GIFT TYPE
Fiscal Year 2017–18

Total: \$515,725,887

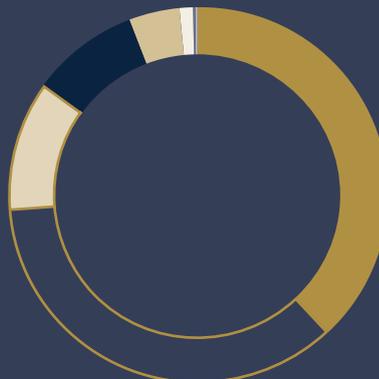
- Pledge Payments
\$312,900,906
Cash gifts directed to existing commitments
- Outright Gifts
\$199,484,476
Cash gifts not connected to a pledge
- Matching Gifts
\$3,340,505
A corporate or foundation cash gift that matches an employee gift



EXPENDABLE GIFTS
Fiscal Year 2017–18

Total: \$127,051,465

- Academic Program Support
\$48,075,541
- Unrestricted
\$45,588,307
- Department Discretionary Funding
\$14,360,535
- Other Expendable
\$11,617,405
- Scholarships
\$5,482,048
- Fellowships
\$1,438,564
- Directorships
\$250,000
- Professorships
\$239,065



Financial Overview

CASH RECEIPTS BY FISCAL YEAR

By Fiscal Year



Corporate, Foundation, and Matching Gifts

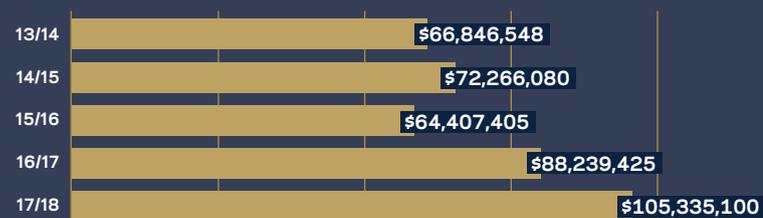
CORPORATE SUPPORT

By Fiscal Year



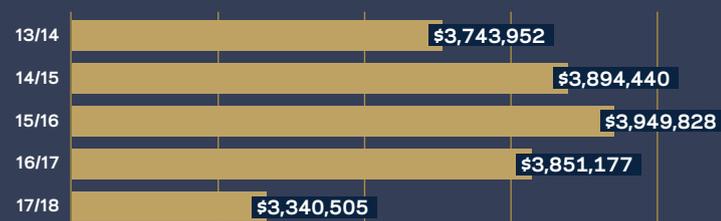
FOUNDATION SUPPORT

By Fiscal Year/Includes Family Foundations

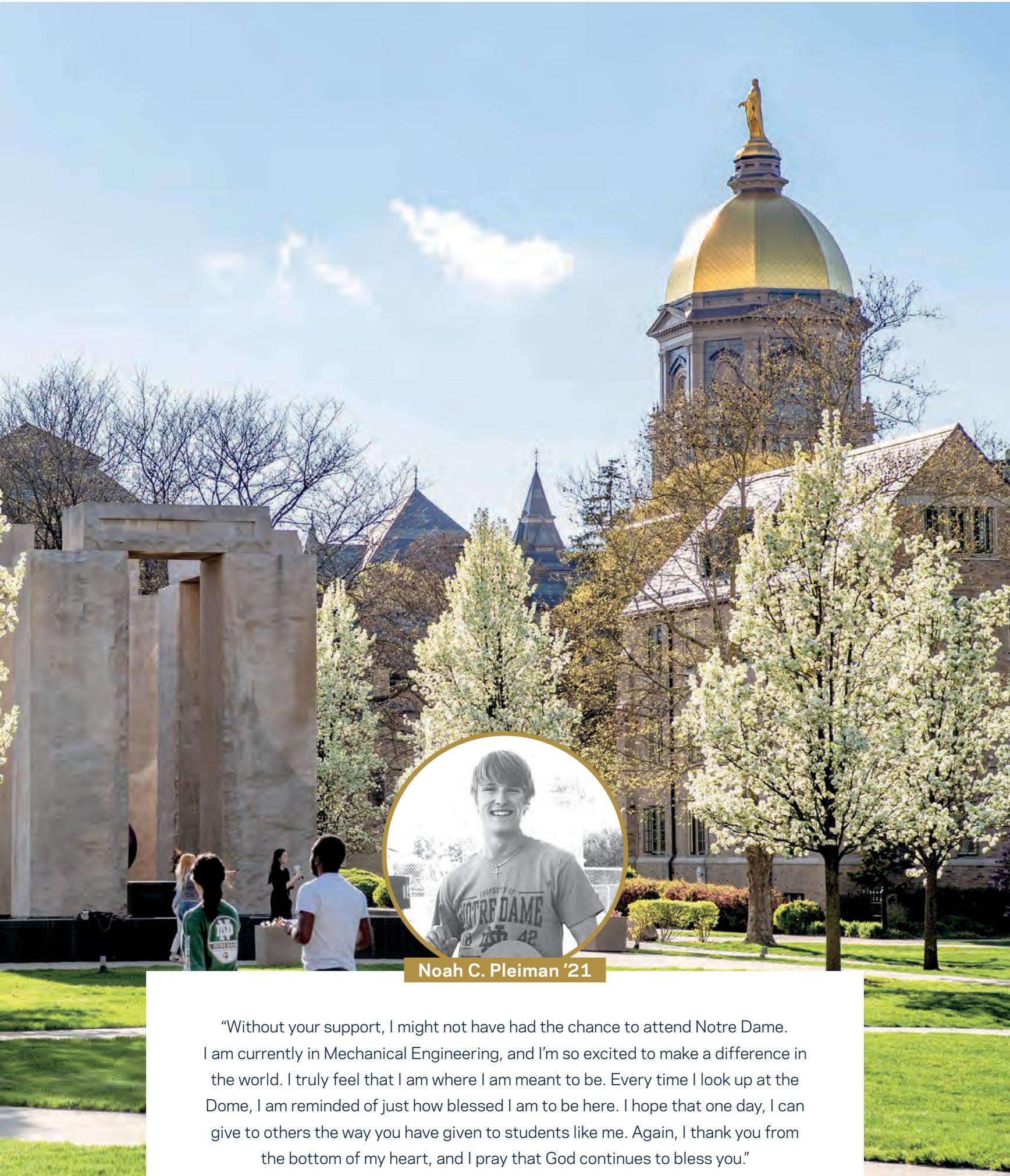


MATCHING GIFT TOTALS

By Fiscal Year



In fiscal year 2017-18, the cost of fundraising was 10 cents of each dollar raised.

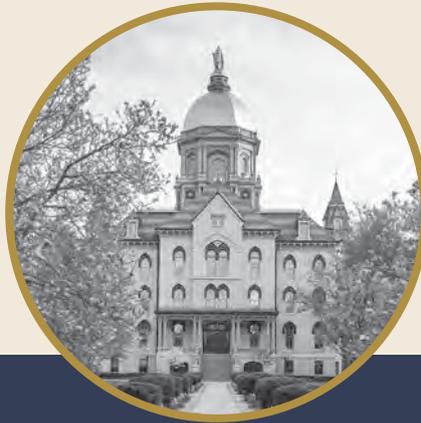


Noah C. Pleiman '21

“Without your support, I might not have had the chance to attend Notre Dame. I am currently in Mechanical Engineering, and I’m so excited to make a difference in the world. I truly feel that I am where I am meant to be. Every time I look up at the Dome, I am reminded of just how blessed I am to be here. I hope that one day, I can give to others the way you have given to students like me. Again, I thank you from the bottom of my heart, and I pray that God continues to bless you.”



The 175th Notre Dame Trail Pilgrims



**Notre Dame, our Mother
Tender, strong, and true
Proudly in the heavens
Gleams thy gold and blue.
Glory's mantle cloaks thee
Golden is thy fame,
And our hearts forever
Praise thee, Notre Dame.
And our hearts forever
Love thee, Notre Dame.**



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MAC in FIVE

Donor Society Stewardship

Mac in Five is a series of five weekly emails positioned as a stewardship touch-point for McMaster University's most loyal and generous supporters. The project is a bite-sized learning program through which we share knowledge on topics supported by McMaster researchers. The inaugural theme was on healthy aging research, followed by New Year's resolutions.

The goals of this project are to 1) provide a meaningful and worthwhile stewardship touch point for our leadership donors, 2) engage our leadership donors in online bite-sized learning about a relevant subject matter, 3) provide a benefit for President's Club members who are unable to attend special events, and 4) provide an opportunity to showcase the research undertaken at McMaster University.

The open and click-through rates have been consistently high for this project.

President's Club members – opens 49% - 60% - click through 13%

Gilmour Society members – opens 41% - 54% - click through 11%

Gilmour is our loyalty society.

The work for this project – writing, design, email deployment – is done in-house. We were also able to feature some graduate student researchers, along with our faculty researchers, in the second iteration, which has allowed us to connect the work of McMaster students to this initiative as well.

What's Your McMaster Persona? National Philanthropy Day Stewardship

For National Philanthropy Day in 2017, we built a five-question quiz titled “What is your McMaster Persona?” We released the quiz using our email and social media channels as a thank-you stewardship piece, and we were thrilled with the response. Not only did we have 1,800 alumni complete the quiz (tracked through our email), but we also had almost as many people complete the quiz from social shares (from us and from people sharing their results). For the results, your persona was either Academic, Fanatic, Traditionalist, or Naturalist. We included our donors as well as our alumni non-donors, who we informed it was National Philanthropy Day, we had created a token of thanks for our donors, but we wanted to include them in the fun, too.

Our goal for this project was to creatively steward our alumni and donors and stand out from the pack on a day with heavy traffic of fundraising communications from many organizations to their donors. A lot of schools create a video for Philanthropy Day. We have done one for many years. Our metrics were not compelling the previous year, so when we sat down to strategize for National Philanthropy Day 2017, we decided to throw out the video idea and try something new.

While the open rate for our email was slightly lower than 2016 – 23% (17,003) vs 25% (17,396) – the click-through rate was significantly higher – 3% (2,372) vs 1% (952).

Our engagement with the quiz was a total of 3,329 unique completions (1,811 from email, 589 from our social shares, 929 from user shares). This was much higher than our video views the previous year (774). As well, we had three (trackable) social shares of the video in 2016 and more than 500 social shares of the quiz in 2017.

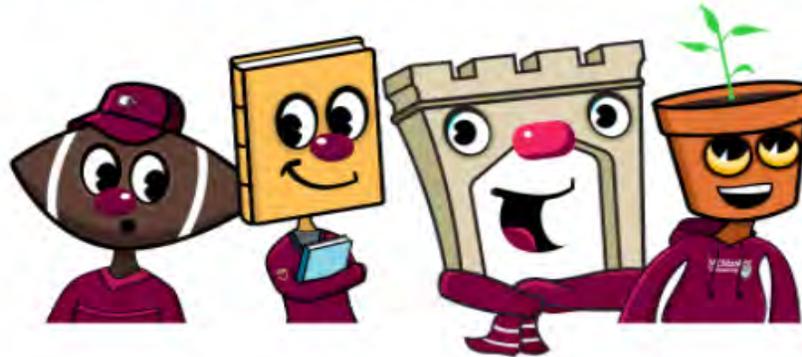
The work for this project – writing, design, email deployment – was done in-house. We used a survey tool called Typeform which we already pay to use for our post-event surveys.

You can try the quiz here: <https://mcmasteralumni1.typeform.com/to/kv4aYh>

What's Your McMaster Persona? National Philanthropy Day Stewardship



What's your McMaster Persona?



You know McMaster is a special place.

We know it's made even more special by your donor support.

Today, on National Philanthropy Day, we want to say an enthusiastic *thank you* – for your support of McMaster and your investment in the power of education.

As a small token of thanks, we've created a short, interactive quiz, which we hope will give you a moment of levity and McMaster nostalgia in your day. It's just a few questions and you can feel free to share it with your McMaster pals if you wish.

So, it's time to find out: what is YOUR McMaster persona?

Find out in two minutes

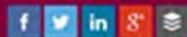
Thank you for being a McMaster donor. It means the world.



You're an ACADEMIC.

You love McMaster. You knew your profs on a first name basis and know that the scale was up to 12, not just 10. Seeing McMaster in the news fills you with a sense of pride. You can repeat your student number by heart, love the smell of books and have a favourite pen. You have those McMaster memories that feel like they were yesterday.

SHARE YOUR RESULTS:



McMaster Alumni Retweeted

Ben Chapdelaine @BenChapdelaine8 · 15 Nov 2017

According to @McMasterAlumni #nationalphilanthropyday quiz, my McMaster Persona is pretty accurate. What is yours? bit.ly/2murdQ6



MAC in FIVE

Donor Society Stewardship

Healthy Aging Research Series



MAC in FIVE



Aging never felt so good.

5 Weeks • 5 Professors • 5 Lessons • 5 Minutes a day

Course: Healthy Aging

There is one thing we can say for certain: every morning we wake up a little older and a little wiser. This is the inspiration behind our inaugural **Mac in Five** course. Curated by our top professors and researchers, over the next 5-weeks you will have the opportunity to learn more about the research conducted in [Healthy Aging](#) right here on campus. Each lesson will only take approximately five minutes to complete. We are thrilled to share this exclusive program with you, our most generous and loyal President's Club donors.

Every Wednesday throughout the month of November a new lesson will be sent to your email. Our professors will share their research, assign further (optional) reading, and perhaps even an assignment.

Please enjoy the video below to meet some of the professors you will learn from this week.



MAC to FIVE



Lessons from the oldest of the old.

5 Weeks • 5 Professor • 5 Lessons • 5 Minutes a Day
Course: Healthy Aging • Lesson #7 of 9

Would you rather live a long life in poor health or a short life in good health? For most of us this seems to be the trade-off but for the select few who become "supercentenarians" (those living to > 110), they seem to have the best of both worlds. Intriguingly, these oldest of the old are usually of sound mind and physically active until their death, and avoid many of conditions or diseases that almost seem to be an inevitable part of old age such as cardiovascular disease, metabolic disorders or dementia. Most of us aspire to an old age like the supercentenarians, which is active and healthy but when ill-health makes its inevitable appearance, the decline is rapid but brief. So how do they do it? Genetics seems to play a role, but there is no magic gene that makes us live longer, nor is there a particular diet, exercise or pill that ensures that you'll live into the next century. Interestingly, we've recently learned that having a healthy immune system may be necessary for long and healthy life.

One of the most provocative studies of the role of the immune system in longevity comes from the study of Hendrikje van Andel-Schlöper who was, briefly, the oldest woman in the world. She died of cancer at 115 and donated her body to science. She was remarkable in many regards but from an immunological perspective, she was exceptional because at the time of her death her circulating white blood cells came from only two hematopoietic stem cell clones, as opposed to the thousands or tens of thousands one would expect in a younger adult. Since a diverse repertoire of white blood cells is required to repair damaged tissues and seek out potentially cancerous cells, this loss of stem cells may, ultimately, have caused her death. The oldest old have another interesting immunological feature - low levels of inflammation, which seem to help them resist chronic inflammatory diseases like cardiovascular disease and dementia for longer.

So what can those of us who have not won the genetic lottery do to live long, healthy lives? Although there are some pre-clinical trials in mice and epidemiological data in humans that suggest it will be one day be possible to extend the years of healthy living by taking a pill, we are not there yet. Instead, we can lower our inflammation and extend the years we live in good health by exercising, eating well, maintaining a healthy body weight, and having a robust social network. We may not have what it takes to be a supercentenarian, but we can make the years that we have be the very best that they can be.

Suggested article for further learning: [New Scientist](#)



Dr. Dawn Bowdish
www.mcgill.ca

Dr. Dawn Bowdish is an Associate Professor at Western University where she studies microbial (especially) and immunological contributions to healthy (or ill) homeostasis of the upper respiratory tract and how they interact to help or hinder disease pathogenesis such as *Streptococcus pneumoniae*. Since the transition to the power of molecular genetics and genomics and GWAS, we have gained a lot of insight to explore, so in the case where we do, we share that with you.

MAC in FIVE



Here's a New Year's resolution for you: Don't call it exercise - call it play.

3 Walks • 5 15-second • 5 Leetons • 5 Minutes a Day
Course: New Year's Resolutions • Lesson #2 of 5

This week packs a double punch. McMaster kinesiologists Martin Gibala and Barbara Fenesi encourage you to stretch your conception of exercise and reach for the notion that it could (and should) be fun.

Martin Gibala:

As a society, we've done such a good job of engineering activity out of our lives. Just try finding the stairs in a hotel or shopping mall. You have to actively resist this and build activity into your day.

We know that one of the most common reasons for not exercising is lack of time. So, our research at McMaster is focused on finding time-efficient activity strategies that will help people get fit, regardless of age or gender. Our message is about giving people more choices that are grounded in good science.

There's a new concept called [exercise snacking](#) – breaking up long periods of sedentary behaviour with short periods of activity. There's evidence to show that engaging in shorter, more frequent bouts of activity throughout the day may actually be better for you – your blood sugar and blood pressure – than a single continuous workout. And [shorter efforts can be more enjoyable](#), so you're more likely to stick with it.

Three points to get you started:

- **You can be active anywhere.** Some of our recent research uses a very practical activity: [climbing stairs](#). We need to change the notion that you have to "go somewhere" to exercise. When I'm travelling, I only need some stairs and a six-foot-square space for some body-weight style intervals (like pushups and burpees) to get in a good workout.
- **It's not only cardio training.** You need to sprinkle activity into your day that involves muscle strengthening as well – something as simple as 10 [air squats](#). Remember that one of the predictors for whether you will need assisted living is: Can you get up off the toilet?
- **Interval exercise doesn't have to be all-out.** That's not suitable for everyone. There's evidence that "interval walking" is better for you than continuous walking. That means, pick up the pace for a while so you're breathing a little harder, and then back off. This type of [interval walking](#) has been shown to improve fitness, body composition, and blood sugar control in diabetics, better than steady-state walking.

Barbara Fenesi:

Remember when we were children and we would go outside and play? We didn't think of it as "exercise" but it was. As adults, we have this notion that we must be serious and we must buy a gym membership and go five times a week. We set unrealistic goals and we feel intimidated by the culture of super-fitness that we see around us.



**Michigan
Technological
University**

Your Impact. **Our Future** →



MICHIGAN TECHNOLOGICAL UNIVERSITY IMPACT REPORT 2018





ONLY AT MICHIGAN TECH!

Meet Abigale Hayes. Abigale will begin her first-year 400 miles from her hometown of Lake in the Hill, Illinois. She says she's excited to embark on her new life at Michigan Tech because she will have the opportunity to meet new people, but worries about how much she will miss her family. Abigale plans to major in engineering management.

Meet Ross Michaels. Ross is a recent Tech graduate who began his first semester at the University of Michigan's Medical School this fall. He says, "Where else could I have led a research project on liver fibrosis; watched autopsies; designed a device for the insertion of a myocardial pacemaker via a minimally invasive procedure; published a paper detailing a 3-D printed device we designed and made accessible to the entire world to help diagnose childhood malnutrition; married my high school sweetheart; pole vaulted and learned to throw a discus, shot-put and javelin; coached high school football and track; and saved my best friend's father's life on a bike trail in the middle of the woods?"

The fall brings new faces, new beginnings, and boundless opportunities for many of Michigan Tech's students and alumni.

Abigale will join more than 1,200 new first-year students that comprise Michigan Tech's 2018-19 entering first-year class. Their average ACT score is 27.2. They represent 31 states, five countries, and makeup 15 percent of our total student body. This group is one of the most diverse ever in terms of race, age, and gender.

Ross and the other members of his graduating class of 1,756 promise to put their Michigan Tech degrees to good use. Seventy-seven percent of our graduates will go to work full-time with an average starting salary of \$60,000, 2 percent have plans to join the armed forces, and 12 percent will continue their postgraduate education.

At Michigan Tech, our alumni don't just give for the sake of giving—they give for the sake of paying it forward.

In turn, we challenge our students to not just think about what they want to do with their lives, but more importantly, what impact they want to have with their lives.

Contained within, is a sampling of how your philanthropy has everyday impact on students like Abigale and Ross.

Thank you for your belief in our mission and support of our programs and students.

Sincerely,

Dr. Richard J. Koubek
President, Michigan Technological University
and Michigan Tech Fund

WE THANK YOU.



At Michigan Tech, **92** percent of undergraduate students receive financial aid. Of those, alumni and friends support **985** undergraduate students with scholarships. Because of you, our donors, students receive an education, discover new possibilities, and transform the world. Here's how your gift has made a difference to students:

I have participated in many things at school such as broomball, Winter Carnival, hockey games, and exploring the great outdoors that lay all around the school. I even learned to ski on Mont Ripley. It's also been the place where I have met many lifelong friends who have made the whole experience even better. All of the great opportunities I have had would not have been possible for me without the kindness and generosity of people who have donated to this scholarship.

Rebecca R.

Donors like yourself are the reason students like me are able to pursue our dreams and make a career and life for ourselves.

Christine C.

Once more, I greatly appreciate your generosity and dedication towards supporting my generation's education. Many students could not afford a Michigan Tech education without the support of donors such as yourself. People like you inspire me to support students in the future when I am capable of doing so!

Alden G.

It means so much to me to have received this scholarship. I didn't know how I was going to pay for my last semester at MTU and then I received this blessing. Thank you so much for empowering me and supporting my education. I want to change and better the world, and being able to afford to complete my education has allowed me to get one step closer to that dream. Thank you again. I hope to one day be able to give back to a student the way you have given to me.

Erin R.

Thank you again for your generosity. It is greatly appreciated and goes a long way towards making college more affordable. I am so lucky to have a great Husky family.

Ashley B.

Thank you again for your generosity. I greatly appreciate it and without generous donations like yours, I would not be able to attend Michigan Tech and receive the world-class education it provides.

Anthony C.

Thank you for your generosity! With the help of this scholarship, I have been able to fulfill my dream of applying science and math to solve real-world problems.

With your kindness, I have been able to obtain an amazing education and meet so many wonderful people. In the future, I am going to sponsor a scholarship for young women like myself who are majoring in the STEM field.

Lauren K.

I have tried my hardest to keep my student loans to a minimum during my time here, and your mindful contribution has helped me do that. There have been times where I didn't know if I'd be able to afford my tuition for a semester, but with your help I've been able to carry on and continue my dream of graduating.

Nick W.

BENEFITING STUDENTS. GIVING GENEROUSLY.

BILL JACKSON '58



Excellence in education rests on a three-point foundation: top-quality students, faculty, and facilities. William "Bill" G. Jackson and his wife, Gloria, supported them all during their 40-plus years of giving to Michigan Tech.

The Jacksons made their first gift in 1973, 15 years after Bill graduated with a BS in Electrical Engineering, and continued to contribute. They made their first major gift in 1998, establishing the William and Gloria Jackson Endowed Scholarship for electrical engineering majors.

The Jacksons second major gift, in 2007, was inspired in part by Bill's career. In addition to earning an engineering degree, he took classes in engineering administration at Michigan Tech, which served him well as he went on to establish the cable television company CableAmerica. The William and Gloria Jackson Endowed Professorship supports "an exceptional scholar and teacher whose expertise and activity bridges the disciplines of computer science, electrical and computer engineering, and business entrepreneurship."

In 2013, the Jacksons made their final major gift, funding the William G. Jackson Center for Teaching and Learning, located in the Van Pelt and Opie Library, and an array of technological improvements throughout campus.

Sadly, Bill passed away on March 1, 2018. He has received multiple honors from Michigan Tech, including the Distinguished Alumni Award, but his most lasting recognition will be the success of the thousands of students who continue to benefit from his generosity.



JACOB PIETI JACKSON SCHOLARSHIP RECIPIENT

"Back in high school, I knew I wanted to be a part of big projects with large, tangible products, so I decided to major in civil engineering, with the goal of getting my PE license and becoming a project manager. Michigan Tech was an obvious choice, both because I'm from Calumet and because my dad and grandpa both came here. College is more expensive than it was in their day, but I've been fortunate. Scholarships have made a huge difference in my education. They removed financial stress and set me up for a better future. When I'm established, I'll be likely to support a scholarship as a way of passing on the generosity of the donors who helped me."

ENTREPRENEUR. TECH ADVOCATE. \$2 MILLION DONOR.

DR. FRANKLIN '60 & LORRAINE ST. JOHN



LORRAINE AND FRANKLIN

Franklin St. John was not just the first person in his family to go to college. He was the first to graduate from high school. "If I hadn't been close to Michigan Tech, I don't know what I would have become," he said. "One of the neighbor boys in L'Anse graduated in 1955 in metallurgy, so I thought maybe I could be a metallurgist too."

It was thin soup, but nourishing enough to launch a successful life. St. John did well in high school, earning a scholarship and his own BS in Metallurgy in 1960.

He parlayed that degree and two others—an MBA and an MS in Industrial Engineering—into a wide-ranging career as a chief metallurgist in steel mill, company vice president, and, finally, entrepreneur. "Since I got out of Tech, I haven't had a job I didn't like," he says.

He began his latest venture, HerbaSway, along with his wife, Lorraine, in 1996. The company makes and markets liquid herbal concentrates, many of them based on traditional Chinese medicine.

"I took a lot of chances when I went out into the business world and made a lot of decisions," says St. John. "Over half of them were bad, and I lost a lot of money, but I made money, too." Now, he enjoys giving some of it away, especially to the university that made it all possible.

St. John has endowed two scholarships to support Baraga County students attending Michigan Tech and has established the Franklin St. John Endowed Chair in Materials Science and Engineering, an honor held by the current chair of the department, Stephen Kampe. That endowment marked Michigan Tech's first million-dollar gift. In recognition of both his philanthropy and his professional accomplishments, St. John has been named a member of the Academy of Materials Science and Engineering and was awarded an Honorary Doctorate of Engineering in 1999.

"The materials science department changed my life," he said. "It's a give-back thing. If it weren't for my degree, I might be working in the woods."



DR. STEVE KAMPE

CHAIR, MATERIALS SCIENCE AND ENGINEERING DEPARTMENT
HOLDER OF THE ST. JOHN ENDOWED POSITION

"Dr. St. John's endowed professorship creates an opportunity to implement a wide-variety of high-impact projects to promote the image, reach, and capabilities of the Department of Materials Science and Engineering. One of these activities includes sponsorship of MakerMSE™, an entrepreneurial pathway where students can propose to develop, from conception through production, an artifact or product using the department's notably unique processing labs and facilities. The endowment provides, for example, the initial investment to cover the costs of the tooling and prototyping necessary to establish a proven and working standard operating procedure. It is a way to remove some of the financial roadblocks which often inhibit creativity and innovation. The results have been fantastic and a lot of fun, too!"

CONTINUING THE LEGACY. SUPPORTING WOMEN IN BUSINESS.

DR. DAVID LYTH '73



ALINA HARMALA AND DAVID

David Lyth will never forget the moment he met Joyce Caylor. "Back in 1968, there were only about 300 women at Tech, and one of them was talking to my roommate," he says. Never one to let an opportunity slip away, David did the only sensible thing: "I walked up and inserted myself into the conversation."

A great friendship evolved into love. David and Joyce earned business degrees and went on to get married, build successful careers, and share a rich, fulfilling life together. David is now a professor of industrial and manufacturing engineering at Western Michigan University, while Joyce held a number of high-

level corporate posts and started two businesses. Then, in 2009, she was diagnosed with brain cancer. Before she passed away in 2014, they decided to set up a scholarship to help young women. So David funded the Joyce Caylor Lyth (JCL) Scholarship to benefit young women from the UP who wanted to major in accounting but didn't have a lot of resources. In addition, he launched the Pioneering Women in Business (PWB) Annual Scholarship, which has attracted support from multiple donors.

Joyce combined a successful career in business with high ethical standards and a keen sense of justice, David says, and he hopes that those qualities are passed down to her scholarship recipients. He has written a biography of his late wife, which he shares with the scholarship recipients. "It's important to me that these women know who Joyce is," he explains. "In a way, they are like Joyce's daughters, because they are continuing the legacy of this wonderful woman."

ALINA HARMALA

JCL AND PWB SCHOLARSHIP RECIPIENT

"Just to be considered for the Joyce Caylor Lyth and the Pioneering Women in Business scholarships is a rare privilege, but to be selected for both has been a great honor. Like Joyce, I've been interested in business since high school; the accounting classes made sense to me. And as a Yooper growing up in Calumet, I knew about Michigan Tech's great business program. It didn't make sense to even consider another school.

Business Professionals of America (BPA) inspired my interest in the world of business, and as a Tech student and accounting major, I volunteered at regional and state BPA conferences. Since graduating, I have accepted a position as a staff accountant at ThermoAnalytics in Calumet, which gives me an opportunity to achieve two of my goals: first, to apply Joyce's values of hard work and ethical conduct in the workplace, and second, to continue to make my home in the beautiful Upper Peninsula."

EDUCATING FUTURE LEADERS.

JOYCE '70 AND RICHARD '70 TEN HAKEN



JOYCE AND RICHARD

There are three pillars to a successful life, says Richard Ten Haken: family, faith, and education. Michigan Tech provided that third pillar for both Richard and his wife, Joyce. For the past 20 years, the couple has shown their appreciation by giving annually to the University, and through their estate plans. Their focus has been the School of Business and Economics (SBE), though they also support a variety

of other Michigan Tech efforts, such as Summer Youth, the clock tower, and the husky statue.

The Ten Hakens both earned accounting degrees in 1970 and built successful careers, Joyce as a CPA and Richard as a pilot. They are paying that success forward by funding the annual Joyce and Richard Ten Haken Scholarship and have contributed to the Dean of SBE Recruiting Scholarship and the

Sam Tidwell Center. "Richard and I have been so blessed, and we want to give back, to give students a chance to achieve their goals," says Joyce. "I feel strongly that people who want to go to college should be able to go to college."

They also tailor their giving to promote the overall health of the SBE. Their two fellowships, the Richard and Joyce Ten Haken Faculty Fellow in Business and the Richard and Joyce Ten Haken Faculty Fellow in Accounting/ Finance, help attract and retain quality faculty. In addition, they have helped launch an effort to build a new facility for the School. "To be a successful scientist or engineer, you need to know about business," says Richard. "You need to understand how to market your ideas. We want to improve the ability of the business school to educate all Michigan Tech students."

The Ten Hakens are members of the Hubbell Society, the McNair Society, and the SBE Academy of Business, and are 20-plus year members of the Presidents Club.



SBE TEN HAKEN PROFESSORS

"My research focuses on using data analysis to help auditors issue better opinions, since wrong opinions can be very costly, both for the company and for investors. We rely on machine learning and other advanced computing techniques, and the Ten Hakens' gift has allowed me to support a research assistant to analyze Big Data, as well as two teaching assistants.

Thus, the Ten Hakens are not only helping my research, they are also indirectly providing scholarship support to three Michigan Tech graduate students. None of this would be possible without their help, and I'm honored and grateful for their support."

—Dr. Dan Eshleman, Richard and Joyce Ten Haken Faculty Fellow in Business



"To pursue my research on the strategies high-tech companies use to lower their tax burden, I needed access to a very large, expensive data set. The Ten Hakens' giving not only covers that cost, it also supports my three research assistants and has funded several trips to Appleton, Wisconsin, which have allowed our students to network with professionals in major accounting firms. Their support has been absolutely critical, and I can't thank them enough."

—Peng Guo, Richard and Joyce Ten Haken Faculty Fellow in Accounting

SAYING THANKS. GIVING BACK.

ROSS '60 AND MARY ANNE ROEDER



MARY ANNE AND ROSS

Ross and Mary Anne Roeder have always felt that college life should involve more than labs and classrooms. So about 15 years ago, when Michigan Tech's football program fell victim to state budget cuts, they were among the dedicated cadre of alumni who helped bring it back from the brink, and they have remained key supporters. "We believe that football—that all sports—are a big part of the college experience," Ross says.

Ross attended Michigan Tech in the 1950s, changing his major from

engineering to business before earning degrees from Michigan State and later UCLA. "Tech was 100 percent engineering and science at the time," he remembers. "Since then, more sports have been added, as well as performing arts. It's given Tech more diversity—women's sports have been a great addition."

To appreciate all that college life has to offer, however, you must first go to college. Until Ross enrolled at Michigan Tech, no one in his family had attended a university, and later

he learned he was not unique. In his former role as president of the Michigan Tech Fund Board of Trustees, he was impressed by how many Tech alumni were also the first in their families to get college degrees. At a time when college costs are rising all over, the Roeders want to make sure today's young people have the same opportunity.

"We are both passionate about education, and we both had the opportunity to get a good education," says Mary Anne. "We feel it's important to help talented students without our family resources to achieve the same things we did." They focus this aspect of their Tech giving on the School of Business and Economics, where Ross acquired the fundamentals of an education that would launch a career leading highly successful businesses. Their Ross Roeder Endowed Scholarship recognizes business students with leadership and entrepreneurial skills.

"I've always had a fond feeling about Tech and had lots of friends there," says Ross. "This is one way to say thanks."



JIMMIE CANNON

ROEDER SCHOLARSHIP RECIPIENT

"I initially came to Michigan Tech to play football, but I stayed for the awesome experiences. I've been president of the Black Student Association, a member of the Undergraduate Student Government, and youth pastor in my church, plus I was honored to receive the 2017 Percy Julian Award for promoting diversity. None of that would have been possible without support, and the Roeders' scholarship in particular has been a blessing. They have helped me attend college and pursue my dreams.

I am now completing a double major in accounting and MIS and sitting for my CPA, so being a public accountant is a logical next step. But I'm also considering pursuing a law degree, which would put me in a position to serve others. I believe in a selfless lifestyle, and I strongly believe that good comes to those who do good."

PROVIDING RESULTS. ADVANCING STUDENTS. **RON '60 AND ANN MARIE HARMA**



RON AND ANN MARIE

Ron Harma had parlayed three Michigan Tech degrees and his own hard work into a stellar career, both as an international consultant and as an executive at Cleveland Cliffs, and he and his wife, Ann Marie, wanted to say thanks.

In five short years, he had earned bachelor's and master's degrees in minerals processing, plus a BS in Engineering Administration. Those degrees proved invaluable, and the Harmas aimed to channel their giving to students following a similar path. "We wanted to support undergraduates in a meaningful way, so we thought of endowing a scholarship," says Ron. "But the need was actually greater in other areas, especially professional development."

So, the Harmas established the Ron and Ann Marie Harma Endowed Minerals Processing Undergraduate Research and Professional Development Fund to bring minerals processing students and companies together.

"The mining community is a fairly tightly knit group, and it's important for these undergraduates to get to know some of the key players in the business," Ron says. The

endowment pays for travel to technical and professional meetings of the Mining Engineering Society. "Once they get in the building, they have a chance to make good contacts, establish relationships, and get jobs."

The endowment also supports undergraduate research projects. "They often don't go to graduate school, and this lets them work on small research projects of their own, which they will have to do on the job," Ron explains. "They are appreciative of our support. It makes me feel very good. I'm glad to find that it's getting to the right place and providing a valuable result."



DR. PRADEEP AGRAWAL CHAIR, CHEMICAL ENGINEERING DEPARTMENT

"It's hard to overstate the value of Ron and Ann Marie's support for students minoring in minerals processing. Here's just one example: Last year the Harmas' giving paid travel expenses for four undergraduates attending the 2018 SME [Society of Mining, Metallurgy & Exploration] Annual Conference and Expo in Minneapolis, where they were awarded second prize for their poster presentation. That was a terrific experience for them, plus it was a great opportunity to connect with employers and see what's happening in their field all over the country.

We especially appreciate the fact that the Harmas have given us the freedom to use their gifts in targeted ways to promote student success. Thanks to their support, we also pay for all our students' annual memberships in SME. For 19- and 20-year-olds, the sense of professionalism that comes from this is simply priceless."

SERVING OTHERS. ENCOURAGING BROTHERS. **PAUL SZCZESNY '82**



PAUL SZCZESNY AND JAKE KESSLER

As one of nine children, Paul Szczesny, always knew that his parents wouldn't be able to write any big checks to pay for his education. But the family pitched in as best they could to get him through Michigan Tech. "My sister

and brother-in-law helped out, and my mom would send me \$10 a week," he remembers. "That was a lifesaver."

Paul enjoyed Tech, but Greek life took his experience to another level. "In the middle of my

sophomore year, I got involved with Sigma Tau Gamma," he says. "When I joined the fraternity, it became my home."

After earning a bachelor's degree in chemical engineering in 1982, Paul remained active in the fraternity, both at the national level and serving for decades as housing manager and financial advisor to Michigan Tech's Sigma Tau Gamma chapter. Then he began to think about establishing a scholarship fund.

The result was the Paul G. Szczesny Endowed Scholarship, which has given over two dozen \$500 awards, with preference to fraternity members majoring in chemical engineering. He also co-founded the Sigma Tau Gamma Endowed Scholarship with another Sig Tau, Jim Bernier '73, and supports it annually. "Now we are encouraging other alumni to give," he says. "We all received a tremendous benefit from Tech and the fraternity, and I'd like to see more of us giving back."

JAKE KESSLER

PAUL SZCZESNY SCHOLARSHIP RECIPIENT

"Paul Szczesny is by far the most involved alumnus and advisor of Sigma Tau Gamma, and to receive a scholarship that implies that I exemplify even a few of his qualities, is a great honor. He has never stopped giving back to the fraternity, which has inspired me to maintain my involvement with Sigma Tau Gamma long after I leave Michigan Tech.

Paul never lets us forget our values, including community service, and I plan to adhere to those values for the rest of my life. I'm a construction management major, and after I graduate I plan to use my degree in developing countries to help build infrastructure—schools, hospitals, whatever is needed."

FUNDING STUDENT TRAVEL. ADVANCING DISCOVERIES.

DR. BILL ROSE



BILL WITH STUDENTS

During his 41 years at Michigan Tech, Bill Rose did everything he could to get his students to places where they could be immersed in science. For many geology graduates, those trips were the highlight of their Michigan Tech education.

"I always took students with me on trips," says the emeritus geology

professor. "That was my priority. After all, the best geoscientists have seen the most rocks."

Travel is life changing. It can lead advanced research, new discoveries, maybe advanced degrees. "We went all over the world, looking at volcanoes, doing research, and going to meetings,"

he says. "I usually took more students with me than I had money for."

Not all students could afford to travel, however. So when Bill retired in 2011, he decided to do something about that. "My dream was to create a quarter-million-dollar fund for student travel," he says.

He launched the Geoscience Student Travel Endowment Fund with a personal donation of \$100,000 to the Department of Geological Engineering and Science, a good start but not enough. "I wanted to get it matched, so I wrote a letter to all my former students," reminding them of how much travel had meant to their own education.

"They loved their trips, and they gave," says Bill. What's more, they haven't stopped. "We still get contributions from alumni."

DR. LIZZETTE A. RODRIGUEZ IGLESIAS

"Before I came to Michigan Tech, I was able to participate in the student trip of a lifetime, visiting volcanoes and meeting volcanologists, all orchestrated by Bill Rose. So when I applied to graduate schools, Tech was my first choice. Right away, Bill organized a trip to Central America, which led to my dissertation and my first peer-reviewed publication. It was the first of many incredible trips, and I learned more every time. Bill taught us how to do international field work, emphasizing the importance of collaborating with local groups. I became a better student and human being because of those experiences.

After joining the faculty of the University of Puerto Rico, I followed Bill's example, organizing trips to volcanic regions and always including students. They love it just as much as I did. So, when Bill asked me to contribute to the endowment, I said yes. There is no better way for me to give back to Michigan Tech."

—Lizzette A. Rodríguez Iglesias, Associate Professor and Director, Department of Geology, University of Puerto Rico—Mayagüez Campus

FISCAL YEAR 2018



Total endowment as of June 30, 2018: \$115.3 million

- Endowed departmental support—\$18.0 million
- Endowed chairs and professorships—\$26.4 million
- Endowed scholarships and fellowships—\$70.9 million



1,061

people have given to Tech every year for the past 10 years

This year 197 donors gave to endowed scholarships and 668 donors gave to annual scholarships

\$1,503,556

received for existing endowed and annual fund scholarships in FY 2018



5 NEW NON-SCHOLARSHIP ENDOWED FUNDS

including professorship and fellowship funds totaling \$1.5 million

15 ENDOWED SCHOLARSHIPS WERE CREATED AND 17 ANNUAL SCHOLARSHIPS WERE ESTABLISHED



\$1,565,925 given to 692 students to help them with their education



ANNUAL GIVING—\$15.1 MILLION donated in FY 2018



11,845 SCHOLARSHIP DONORS (TOTAL)

892 ACTIVE SCHOLARSHIP FUNDS

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 philanthropy merits the respect and trust of the general public, and donors and prospective donors can have full confidence in the not-for-profit 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 that their gifts will be used for the purposes for which they were given.
5. To receive appropriate acknowledgement and recognition.
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10. To feel free to ask questions when making a donation and to receive prompt, truthful, and forthright answers.

The Donor Bill of Rights was created by the Association of Fundraising Professionals, the Association for Healthcare Philanthropy, the Council for Advancement and Support of Education, and the Giving Institute: Leading Consultants to Non-Profits.



YOUR GIFT IMPACTS GENERATIONS

You pay it forward every day to our students with your generous gift. When you support Michigan Tech, you make an impact and an investment in students to create a just, prosperous, and sustainable world. Your generosity rewards intellect, creativity, and tenacity. You take action and lead courageously. You transform lives. You provide generations of impact. And Michigan Tech thanks you.

Your investment this year helped keep Michigan Tech strong and makes it possible for us to share the following:

- **\$60,000** AVERAGE STARTING SALARY
- **92** PERCENT PLACEMENT RATE
- IN 2018, **THREE FACULTY NAMED NSF EARLY CAREER DEVELOPMENT PROGRAM (CAREER) RECIPIENTS**
- **15th** HIGHEST EARLY CAREER PAY IN THE NATION
- **\$72.5** MILLION IN UNIVERSITY RESEARCH EXPENDITURES
- **No. 25** IN THE NATION AMONG COLLEGES AND UNIVERSITIES FOR STEM (SCIENCE TECHNOLOGY, ENGINEERING AND MATHEMATICS) BY *FORBES*



    mtu.edu/giving

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VASTLY INDISPENSABLE

Impact Report



The
Marshall University
Foundation®



Vastly Indispensable...

That is what you are to our students. Through scholarships and internships, you are providing educational opportunities with a hands-on learning approach for students to enter the workforce prepared to succeed.

That is what you are to Marshall University. Through your support to programs, professorships and facilities, the university is able to expand its curricula, recruit and retain award-winning faculty and teach students in state-of-the art learning environments.

That is what Marshall is to Huntington, West Virginia. Through partnerships to integrate the two communities and expand the campus into downtown spaces, students feel at home in Huntington and are searching for ways to serve their community and remain local after they graduate.

IN 2017-2018 
ACADEMIC YEAR, OVER

1,850



SCHOLARSHIPS

were awarded to more than **1,400 different student recipients** in

excess of **\$4.1**
MILLION DOLLARS.



“Your (donor) support to Marshall is vastly indispensable to Huntington because it is giving me the chance to change this community.

I am determined to change the lives of students with disabilities within the community and my donors are funding this dream.”

- Maddy Parker, elementary special education and political science



Maddy Parker

"I chose to attend Marshall because it has been in my blood since I was a child," said Maddy Parker. "My entire family attended and both of my parents work on campus. I feel as if I have spent most of my life on campus, so when it came to deciding, there was no other option for me to consider."

Maddy is a junior majoring in elementary special education and political science. She hopes to attend law school and study disability law.

"I hope to practice for a few years and then begin to make my way into politics as a policy advisor for disability reform," she said.

As a double major, Maddy said she believes her professors are the best part of her programs because they embrace her atypical career goals and help her prepare for her next chapter in life.

"They created a curriculum that will be best for me to do my job," she explained, crediting Dr. Kathy Seelinger from the College of Education and Dr. Jamie Warner from the College of Liberal Arts for always answering questions and forcing her to think "out of the box." Maddy is most looking forward to learning the legislation behind creating a safe environment for individuals with disabilities.

Not only does Maddy balance two separate course loads, she is active in several extracurricular activities as well. Serving as the student representative on the Faculty Senate Assessment and Academic Calendar committees, she is also a member of the Student Government Association, Kappa Delta Pi, Presidential Ambassadors, Herd of Love and Student Justices. Scholarships allow her the opportunity to stay focused on her majors and to be involved at the university.

“My scholarships are vastly indispensable because they allow me to pursue opportunities outside of the classroom to extend my learning without having to worry financially,” she said.

She said she hopes alumni continue to give back and help the Sons and Daughters of Marshall.

“They were in our position at one time and they know how challenging money is for college students,” she explained.

Her hope is that in 10 years the university will have a law school and still holds the feeling of family. As for Maddy, the feeling of family at Marshall is literal. She now shares the tradition of Marshall with her family and can participate in their conversations of their favorite memories.

“You are vastly indispensable to Marshall because you are allowing students to chase after their dreams so they can go out into the world and change it for the better. By students chasing these dreams, they are taking a piece of Marshall with them wherever they go. As a donor, you are spreading the tradition and history of Marshall to the world.”

**AVERAGE
AID IS
\$7,194**



Marshall University's privately funded scholarship recipients from the 2018 Scholarship Honor Brunch.



56%

OF STUDENTS ARE RECEIVING SCHOLARSHIPS

71%

ARE RECEIVING FINANCIAL ASSISTANCE OF SOME KIND

11%

LESS DEBT ON NATIONAL AVERAGE THAN OTHER PUBLIC UNIVERSITIES



“Your support to Marshall is vastly indispensable because it brings people to Marshall and gives them the chance to study at a beautiful, engaging university with students, faculty and professors who all truly care about their interests and encourage and inspire them to pursue their passions.”

- Corey Jones, theatre production and video production



Corey Jones

"Alumni should give back because it gives the next generation of students the chance to succeed," said Corey Jones, a junior from Alderson, West Virginia. "College costs are a massive burden but giving someone the opportunity to pursue an education and a passion is truly a special opportunity."

The recipient of three privately-funded scholarships, Corey is grateful for each one: the Ashland Inc. Foundation John Marshall Scholarship, the Brian Angle Leadership Award, and the J. Kaye Trippy Scholarship in the Fine Arts.

"My scholarships are vastly indispensable because they give me the chance to pursue an education in a field that I wholeheartedly love, without the constant stress and burden of finances hanging over my head," he said. "It also gives me access to a top-notch education and real-world experience through the opportunities at Marshall University. They mean the world to me. Donors that care to give back give an opportunity to the next generation of students - they truly give everyone an opportunity to excel."

Double-majoring in theatre production and video production, Corey said he chose to attend Marshall for many reasons.

"The small campus size made getting to my classes a breeze, while the class size in my majors helped ensure that I got the attention I needed to succeed," he said. "The friendliness of the students and faculty at Marshall made a huge impact on me every time I visited and made it seem a little more like home with each visit."

Now that Corey has spent some time at Marshall, he loves the people - socializing, meeting new individuals daily and never being too far from friends. Ideally, he said he would like to continue his education and receive a master's degree in theatre production.

"I love the people I study with," he said. "They all have such vibrant, colorful personalities. I also love the professors and the buildings that we get to work in. The Joan C. Edwards Performing Arts Center is a huge building with the ability to create entirely new worlds on a stage. The Visual Arts Center also never fails to amaze me, constantly displaying breathtaking artwork made by art majors of various disciplines, each with a burning passion to tell a story or convey their message. I also love that I get to express myself artistically and challenge myself every day, and for that opportunity, I am grateful."

As someone who loves to learn, Corey said he is excited to expand his knowledge of anything his major has to offer.

"I love being able to challenge myself and explore new opportunities that I previously have never encountered," he said.

This past summer, Corey had the opportunity to participate in a theatre internship at a partnership with Vassar College in Poughkeepsie, New York, and New York Stage and Film. The opportunity allowed developing artists to create works without the pressure of the city. As a carpentry intern, Corey built sets and installed them once they were painted.

As part of the internship, students were allowed to take classes in other areas of theatre to learn about daily jobs. Corey took advantage of this learning opportunity and completed a lighting class and production management course.

"There were so many wonderful people from all over the United States and each of them is passionate about creating theatre and improving their skill sets," he said. "Additionally, they are encouraging and made me strive to do my best. I have improved my skill set a lot."

He said he believes one of the most valuable parts of this internship was making connections that are hard to make when you are isolated from big theatre hubs.

"I was excited to do theatre when I started but working and being treated like a professional instills me with a new confidence in the skills I have learned at Marshall," Corey said. "Additionally, I feel like it has helped give me direction. My internship reaffirmed all that I love about doing theatre and made me confident in the field I chose."



Your dedication to students, to Marshall and to Huntington is vastly indispensable because you are helping each one thrive. Your passion is evident and it is because of you that Marshall can embark on a new era of excellence and help both students and the community prosper.

You are vastly indispensable.





My scholarships are vastly indispensable because they allow me to continue my education and experience opportunities through college that I can't get elsewhere.

The network I have built through my years at Marshall will help me be successful in the years to come.

I wouldn't have that confidence without the support of my scholarships because I wouldn't be able to afford this experience on my own.

My scholarships make pursuing my dreams possible.”

- Hannah Petracca, marketing



Hannah Petracca

"I chose to attend Marshall because of the environment and the people. I met people on my first tour of Marshall that completely changed the way I viewed college. I fell in love with the campus and truly felt like my ambitious heart could thrive there," explained Hannah Petracca.

The junior marketing major serves as the Student Body Vice President for the 2018-2019 academic year. She hopes to work as a project or product manager and eventually work her way up in a company to become the chief executive officer.

Hannah is confident her professors are equipping her with a skill set to do so.

"They have truly given me every opportunity I've had at Marshall and encouraged me along the way. I learn so much from them, both academically and professionally," she said. "It is so refreshing to know that I am more than a number in my classroom; my individual success matters."

A recipient of the Thomas Dunfee Memorial Scholarship, the Brad and Alys Smith Family Scholarship, the PROMISE Scholarship and the A. Michael Perry Scholarship, Hannah said she is grateful for the support they provide.

"These awards mean so much because without them, I probably wouldn't be in school," she said. "I would like to thank the founders of these scholarships; you all have made it possible for me to receive a college education and thrive at Marshall University."

In addition to serving as the Student Body Vice President, Hannah is a member of the Student Government Association and Marshall chapter of the American Marketing Association. She actively participates in Campus Collective, a campus ministry, and is

a Presidential Ambassador. Hannah's favorite thing about Marshall is the family feeling and sense of community.

"From students to professors, to administration, we are invested in one another's success. We support each other through our endeavors, just as a family should," she said. This is why Hannah said she believes alumni should give back.

"When you attend Marshall, you become a member of a family. Why wouldn't you want to give back to the institution that has given you the gift of this family? I look forward to the day when I am able to give Marshall even half of what it has given me," she said.

"You are vastly indispensable to Marshall because you are the driving force behind thriving students. You give students the opportunity to not only get an education but also find their passions and pursue them. Without your contributions, Marshall students wouldn't have the opportunity to receive the one thing no one can take from them; an education."

Enrollment in
ACADEMIC YEAR
2017-2018
was 13,259.





The
**Marshall University
Foundation®**

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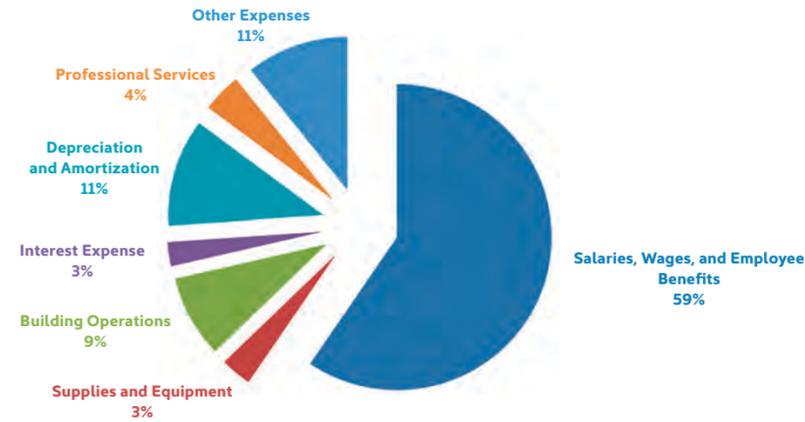
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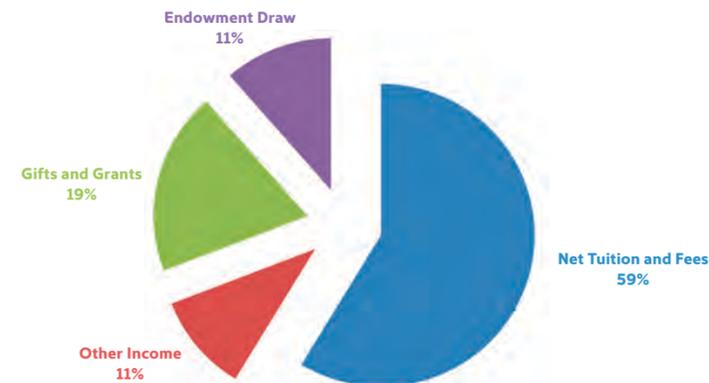


2017-18 financial summary

NEC Expense Distribution



NEC Revenue Sources 2018



400,000

Books, scores, and audio recordings available in the Blumenthal Family Library

“

I would like to personally thank you so much for your generous donation! Thanks to this scholarship, I am taking full advantage of the courses NEC has to offer, including the liberal arts minor. Because of the extra aid this scholarship is providing me, I am able to pursue both my passion for classical voice as well as my passion for theater! I'm so very grateful for all of your support!

—MARIA GIOVANETTI, '19 VOCAL PERFORMANCE



“

I would like to say thank you so much! You gave me so much confidence about my music study. It helps me to keep working harder. I want to become a great pianist in the world. Also, I would let everybody know that NEC is the best conservatory in the world.

—BOYI FA, '20 PIANO PERFORMANCE

“

I am beyond grateful for your generous donation toward my education. The investment you've made has made an enormous impact. I truly cherish this scholarship and will continue to use it as motivation to persevere in my studies and in my performances.

—AMANISHAKETE COLE-FELDER, '19 MM CLASSICAL VOICE



“

Thank you so much for your generous gift! Without this scholarship, I wouldn't have been able to attend NEC, so it means the world to me to have the financial support to make this possible. Thank you again for your kindness and support—I can honestly say that I wouldn't be here without you.

—DEANNA BADIZADEGAN, '20 GD VIOLA



Highland Street



thank you.

On behalf of the NEC community, we are delighted to share highlights from another remarkable year. We are deeply grateful for the involvement of our committed trustees, alumni, donors, and institutional partners who support the work of the Conservatory and the future of music.

Your philanthropy is a crucial investment that ensures our ability to offer a world of possibilities to our students: mentorship from esteemed faculty, exposure to transformative programming and visiting artists, access to world-class concert facilities, and countless opportunities to perform on campus and in the greater Boston community and beyond. The generosity of our donors helps make the extraordinary happen every day.

We look forward to another year ahead.

With gratitude,

Thomas Novak
Interim President

Kathleen Kelly
Vice President, Institutional Advancement

SAVE THE DATE:

**PRESIDENT ANDREA KALYN'S INAUGURATION
FRIDAY, APRIL 26, 2019**

NEC CHIPS Highlights

- 27 Saturday coachings**
- 20 Friday sessions**
- 5 Monday sessions**
- 4 Masterclasses**
- 2 Chamber Festival performances**
- 2 Jordan Hall performances**

"A once-in-a-lifetime experience for the young musicians"

NEC Prep's Chamber Music Intensive Performance Seminar (CHIPS) offers select advanced students an unparalleled chamber music experience, with an emphasis on enhancing technical skills and performance at a high artistic level. Twelve students are selected into the program and placed into three string quartets where they will have the opportunity to grow long-term as a group.

Inspired by the success of the Preparatory School's Morse Quartet, the CHIPS program was created to expand that work, thanks to the generous support of Robert and Jane Morse.

Each CHIPS quartet is given access to unique rehearsal space on NEC's campus, an additional rehearsal time every week, and extra coaching by members of NEC's esteemed faculty and visiting guests. An important part of the program includes a weekly joint dinner where students not only get to know one another, but often continue musical discussions about the quartet literature led by Merry Peckham, chair of the Chamber Music Department. The quartet performs in recitals at NEC and the greater Boston community, as well as potential international performance opportunities.



"This program gives these young musicians a taste of being in a professional quartet. They focus on developing their rehearsal styles and performing as a group," explains

Rebecca Bogers, Dean of the Preparatory School. "The 'on the road' experience of touring and special coaching from professional musicians is really a once-in-a-lifetime experience for the young musicians."



"By supporting NEC, we know that we are supporting great artists"

Liza and Tim Sullivan's daughter first auditioned for the NEC Prep Children's Chorus when she was five years old. "We could see from an early age that she inherited my grandfather's musical genes and we wanted to harness her energy and send her somewhere that strives for excellence," said Liza.

"The chorus has helped her grow, and not just as an artist. The choral directors choose challenging material so that the kids can rise to the occasion. They are learning how to sing in a group, how to be supportive and listen to others to make the whole better. My daughter has sung in different languages: German, Yiddish, and different African dialects."

As the Sullivans watched their daughter grow in the Preparatory School, they became more involved with NEC at an institutional level. "We have attended the gala for a few years, and this year, I was asked to be on the gala marketing committee—it is so fun. And knowing that this event supports scholarships and how important that is for educational institutions makes it truly rewarding," said Liza.

NEC works with students of all ages to develop creative skills that will enable them to succeed in whatever career path they follow. "By supporting NEC, we know that we are supporting great artists and hope that when they graduate, they are a happier, more dynamic person who can appreciate and inspire the world in much richer ways."

NEC150, our annual fundraising gala, was a record-breaking event, raising over \$1 million for scholarships. Nearly \$10 million in scholarship support has been raised in the last 10 years for deserving students at NEC.

"Music has been good to me."

A renowned musician, Fenwick Smith was second flute of the Boston Symphony Orchestra for almost 30 years and principal of the Boston Pops. He was also a member of the New England Woodwind Quintet and founding flutist of the Boston Chamber Music Society.

NEC's faculty is a strong, committed community of educators who invest their time, talent, and expertise in our students. Fenwick Smith was no exception. During his distinguished tenure at NEC, he was a devoted studio instructor and chamber music coach. In 2001, he received the Laurence Lesser Award for excellence in teaching. Mr. Smith's annual Jordan Hall faculty recital was widely acknowledged as the start of Boston's fall concert season.

"As a Quaker, Fenwick lived a very simple life," said Janet Corpus, a long-time friend. His gift to NEC attests to both the simplicity of his life and his generosity. Explaining his decision, Mr. Smith said, "Music has been good to me."

"Fenwick's gift was a way of giving back to the art, profession, colleagues, and institution that were so much a part of his rich experience," she said.

Smith's gift will continue his legacy of musical excellence. Providing unrestricted support to NEC, it will enable current and future students to pursue that same excellence in their musical careers.

NEC will continue to celebrate Smith's extraordinary musicianship every September with the annual Fenwick Smith Tribute Concert. We are sincerely grateful for his many contributions to NEC and the incredible impact his gift will have on the NEC community for years to come.





NORTHEASTERN
JUNIOR COLLEGE
Foundation

2018 IMPACT REPORT

2018 HIGHLIGHTS

Northeastern had our Higher Learning Commission accreditation visit in October 2018. We successfully met all 23 criterion!

The NJC Volleyball team and the Women's Golf team are both Region IX Champions for 2018!

Northeastern Junior College Adult and Community Education (ACE) Center was recently recognized by the Colorado Department of Education (CDE) Office of Adult Education Initiatives as one of the top Adult Education programs in the state.

The Wrestling team is currently in the Top 10 teams in the country!

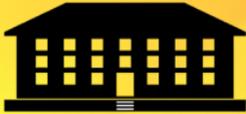
We had 402 NJC students on the Honor Roll!

133 NJC STUDENTS RECEIVED FOUNDATION SCHOLARSHIPS!

\$122,613
In scholarships given by the NJC Foundation!



On the Horizon...
Branch Campus in Yuma, Colorado



EXPANSION OF THE APPLIED TECHNOLOGY CAMPUS




Kathy Reinhardt
Executive Director of the NJC Foundation
970.521.6603
kathy.reinhardt@njc.edu
ES French Hall #215
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Jesse Quinlin
NJC Foundation Coordinator
970.521.6777
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Jack Annan
Executive Director of the NJC Alumni Association
970.521.6690
jack.annan@njc.edu
Walker Hall #217



You participated

5,451 Total Alumni Donors

Every gift— of any size — made by alumni helps OWU in multiple ways:

- Alumni giving is a factor in college rankings
- When OWU does well, the value of an OWU degree remains strong
- Strong alumni participation in giving helps attract and retain the best students and faculty



| | | |
|--|--------|--------------|
| Alumni with gifts up to \$99 |> | 1,312 |
| Alumni with gifts \$100 - 499 |> | 2,393 |
| Alumni with gifts \$500 - 1,841 |> | 1,005 |
| Alumni with gifts \$1,842+ |> | 741 |

To see full lists of all donors to all funds in our 2017-18 fiscal year, please visit owu.edu/donorreport.

You invested in our students

Scholarships and Financial Aid

We believe all students should have access to the global possibilities of an OWU education. That's why 99.3% of students receive financial aid. Whether through long-term investments of endowments for scholarships, or gifts to the Annual Giving program, simply put: your gifts change students' lives for the better.



During our 24-Hour Bishop Match for Students, 621 donors gave \$435,237 to help our students

\$37.3 million
progress

\$50 million
campaign goal

Scholarships and Financial Aid

You thanked your professors

Investing in our Faculty

We know our professors can change lives. Including yours. Permanent investment through endowments supporting the campaign help us prepare to recruit the next generation of outstanding faculty, as one-third of our current professors will reach retirement age in the next decade. Anyone can make a gift to establish an endowment in honor of a favorite professor, or you can thank a professor by making a gift to their department, as 416 people did last fiscal year!



\$13.08 million progress

\$25 million campaign goal

Recruit and Retain the Best

\$3.53 million progress

\$12 million campaign goal

Innovation: New and Enhanced Programs

You transformed the campus

Capital Improvements & Upkeep

Capital improvements make up \$43 million in campaign priorities, including \$10 million for new residential facilities, while gifts to the Annual Fund help support daily upkeep, from fresh paint to refurbishing, including summer work at University and Edgar halls, Beeghy Library, and several fraternity houses.



Butler A. Jones House of Black Culture



Gillespie Honors House



Small Living Unit Duplexes

\$27.72 million
progress

\$43 million
campaign goal

Capital Improvements

You thought global

OWU Connection

Whether through research opportunities, internships, or travel-learning, your support helped OWU students get the real world experience they'll need to pursue fulfilling careers.



\$17.91 million
progress

\$35 million
campaign goal

OWU Connection

You cheered

Team OWU \$450,337 Raised

Your support for athletics helped with everything from jerseys to team meals to travel to tournaments. Our student-athletes put your support to good use this year.

The iconic Branch Rickey Arena opened in 1976 and is home to the men's basketball, women's basketball, and women's volleyball teams, and, soon, men's wrestling. A full renovation of the arena will include bleachers, lights, floor, scoreboard, sound system, and heating/cooling system.



Cirrus Robinson '20 successfully defended her national championship in the high jump at the NCAA Division III indoor championship meet in March and took tops at the outdoor championship in May.

\$306,000
progress

\$3 million campaign goal

Branch Rickey Renovation

You got involved Volunteer to Make the CASE

Alumni engagement — whether through volunteering, attending an event, or simply staying in touch — is one of the goals of our campaign. In addition to giving, there are many ways — small, medium, and large — to Make the CASE.



| | | |
|---|---|--------------|
| People signed up for OWU Alumni Network to help career development | ▶ | 1,100 |
| Postcards written to admitted students to help Admission | ▶ | 1,400 |
| Alumni who attended a social event | ▶ | 6,173 |
| Total alumni donors engaging through giving | ▶ | 5,451 |

Visit owu.edu/makethecase

Thank you for your success

\$4,990,078 Annual Giving Program

Total Gifts

| | | |
|----------------------|--------|-------------|
| Ohio Wesleyan Fund |> | \$3,961,172 |
| President's Circle |> | \$457,160 |
| Team OWU |> | \$450,337 |
| Academic Departments |> | \$121,409 |

Total Donors

| | | |
|----------------------------|--------|-------|
| Ohio Wesleyan Fund donors |> | 7,384 |
| Team OWU donors |> | 958 |
| Academic department donors |> | 416 |
| New alumni donors |> | 380 |

Donor Name

YOUR IMPACT

Endowment Report

*January 1, 2017 -
December 31, 2017*



ODU
EDUCATIONAL
FOUNDATION
EST 1955



A NOTE OF *Thanks*



Endowed gifts play a fundamental role in the continued growth and evolution of Old Dominion University. Your enduring support of our students, faculty, research, programs and a culturally-rich environment is helping us build a stronger university that is home to innovative thinking, groundbreaking discoveries, and limitless growth. The impact of your gifts can be felt every day throughout our community and world. An endowment creates a lasting legacy.

Each year we report on the profound impact that your philanthropic investment has had on the University. This past year was again a good year for the endowments of the University and its Foundations. The endowments grew by over 16%, increasing in value by almost \$35 million over the past year. Our total investment pool topped the \$250 million mark - the highest value in University history. Investment performance was strong last

year, and our intermediate term performance at 7.6% for five years exceeded of 7.2% annual goal.

The Foundation's Investment Committee will continue to pursue its goal of structuring an investment program to provide future generations of Monarchs enhanced and substantial private financial support. With the help of donors like you, we will be able to meet that goal. This report provides a summary of figures from January 1, 2017 - December 31, 2017 and the market values, contributions and disbursement for your fund(s).

We are extremely grateful for your continued involvement. On behalf of President John Broderick, our students, and our faculty and staff, I thank you. Through your philanthropic support, you are helping to shape the future of this great University.

This is our legacy in the making.

Sincerely,

Alonzo C. Brandon '85
Executive Director, Foundations

646 Individual funds make up the ODU endowment.

Each is established by a dedicated and generous donor or group of donors for a specific purpose.

Endowed Funds Support:

Scholarships / Professorships / Student Internship Opportunities / Student-Faculty Collaborative Research Projects / Student Opportunity Funds Facilities / Awards / and more

↑ ODU's endowment as of December 31, 2017

\$240.9m

↑ Transferred to the University from the Foundations

\$9,596,963

↑ By alumni, parents and donors during 2016 - 2017 fiscal year

8,920 Total Gifts

↑ Endowment Assets

As of December 31, 2017



Contact Information

Meredith Hamlet

Director of Donor Relations

757-683-3126 • mhamlet@odu.edu

4417 Monarch Way, 4th Fl, Norfolk, VA 23529

ENDOWED FUND *Financial Information*

Endowment Name

Activity Report

01/01/17 to 12/31/17

Report Recipient

ownername

Endowment Account Number

fundnumber

Endowment Summary

summarystate

Financial Summary

Contributions from 01/01/17 to 12/31/17: contrib

Market Value as of 12/31/17: endowvalue

Spendable income for 2017-2018: spendable

2017-2018 Recipient(s):

recipient1
recipient2
recipient3
recipient4
recipient5
recipient6
recipient7
recipient8
recipient9
recipient10

A GUIDE

To Understanding Your Endowment Activity Report

Market Value

Market value equals the cumulative total of gifts received, adjusted by the realized and unrealized gains or losses, and spending.

Spendable Income

Calculated as 4% of a twelve quarter moving average on market values as of September 30th

OUR FUNDRAISING INITIATIVE

*For Every Monarch.
For Hampton Roads.
For the World.*

Our goal is to raise \$250 million to fund Scholarships, Student Success, Academic Enhancements and Athletics. Through deepened investment, we can continue to offer the best educational value in the Commonwealth, and further expand the boundaries of our global reach.



ODU
EDUCATIONAL
FOUNDATION
EST 1955





YOUR POWERFUL IMPACT

The OSU Endowment | July 1, 2017, to June 30, 2018



Oregon State University
Foundation

Markets rise and fall, but an education lasts a lifetime.

And you have created something that lasts always: an endowed fund at Oregon State University.

Thank you for helping Oregon State move forward with confidence, providing life-changing experiences for students and advancing knowledge to create a better future. Your generosity is strengthening OSU now and will continue to do so for generations to come.

While this report contains a few examples, you and your fellow donors are touching the lives of countless students and professors—countless because your impact is still just beginning.

A Broad Impact: Endowment Designation

As of June 30, 2018

The principal of each endowment gift is invested to generate a steady, reliable flow of funds to support the university's greatest priorities and donors' greatest passions. These gifts benefit the entire OSU experience.



RESEARCH

2%



FACILITIES

1%



PROGRAMS

36%



FACULTY

28%



SCHOLARSHIPS

33%



Gifts for Study

The Impact of Endowed Scholarships

“There’s no way I could be here without scholarships.”

Alexis Williams grew up in an agricultural community in eastern Oregon, a town where one in five kids lives below the poverty line. In middle school she became interested in veterinary medicine and began to dream of going to college: something no one in her family had ever done.

“Our family always struggled with finances,” she says. “My parents encouraged me to work hard in my classes, and I dedicated myself to my studies. When I got my financial aid package from OSU, I was absolutely blown away. I remember telling my parents I had received these scholarships and I can actually go.”

“When someone gives to scholarships, they’re helping students become the people they have dreamed of becoming. That is a wonderful and powerful thing.”

ALEXUS WILLIAMS has received support from four endowed scholarships, including one established in 2003 from the estate of John W. DeMuth, Jr. In the last five years alone, this scholarship has helped 88 OSU students.

IN 2017-18, the university awarded **3,929 STUDENTS** with donor-funded scholarships/fellowships totaling:

\$11.1 million



Endowment Performance

July 1, 2017, to June 30, 2018

One-Year Total Return

As of June 30, 2018, Annualized
Net of 1.425% advancement fee

9.49%

5-year: 7.30% | 10-year: 4.49%

10-Year Performance

Over ten years, \$100 invested in the OSU
Foundation endowment would have grown to
\$154.45 if no disbursements were made.



Asset Allocation

As of June 30, 2018



Gifts for Teaching and Discovery

The Impact of Endowed Faculty Funds

“The endowed professorship provides great freedom for high-risk-high-reward efforts.”

Since Jonathan Hurst joined OSU in 2008, the university’s robotics program has emerged as a front-runner, ranked among the top four robotics programs in the nation. Hurst’s lab focuses on creating robots that can go anywhere people go. His team was the first to make a machine that reproduces human-like walking dynamics.

“Grants are very constrained and specific, with careful rules about how the money is spent. But it can be difficult to cover unexpected costs or take advantage of timely opportunities—such as an outstanding new Ph.D. student applying when existing funding is already spoken for,” he says.

“With the endowment, I am more free to explore an idea that I believe is extremely promising, but which may need some work to be able to convince others.”



JONATHAN HURST is one of two College of Engineering Dean’s Professors at OSU. The endowed professorship was created by an anonymous donor.

DONORS have created **145 ENDOVED POSITIONS** at OSU.
Each circle represents 10 faculty positions.



Impact and Growth

The OSU Endowment

Endowment Distributions

Funds disbursed to campus, 2017-18

\$19.25 million

Represents 4.25% of the OSU Foundation endowment's 12-quarter average market value

Endowment Growth

(In millions: includes OSU, OSUAA, and OSUF endowed funds.)



New Contributions to Endowed Funds

(Last five fiscal years)

| | |
|---------|-----------------|
| 2013-14 | \$19,435,483.62 |
| 2014-15 | \$26,275,374.85 |
| 2015-16 | \$24,527,713.87 |
| 2016-17 | \$18,146,804.51 |
| 2017-18 | \$26,487,518.89 |

Gifts for Service and Innovation

The Impact of Endowed Program Funds

“I can now go into my future with a larger perspective.”

Last March, 31 OSU students spent their spring break in Puerto Rico, helping a school recover from Hurricane Maria. Auna Godinez, a senior in renewable materials, was particularly interested in the trees uprooted by the devastating storm. She came to understand that local residents knew this tropical wood was potentially valuable, but utilizing it wasn't easy. There was simply no way to process it.

Transformational learning happens when students apply what they've studied to complex, real-life problems. Yet many of these hands-on learning activities have additional costs. Endowed programmatic funds widen the door of opportunity.

“I learned that it's going to take a lot more than what I can offer right now, but I would love to be one of the people to help bring light and support to this issue.”



AUNA GODINEZ took part in the service learning trip to Puerto Rico with help from the Thomas I. Haley Experiential Learning Fund. Other endowed programmatic funds at Oregon State support colleges, departments, the library, the arts, athletics, 4-H, Extension, the OSU Alumni Association, and much more.

Investment Committee

As of July 1, 2018

LEONARD APLET '76
(Committee Vice-Chair)
Portland, Oregon
*Senior Portfolio Manager
Columbia Management Company*

JON BETTENDORF '88
Beaverton, Oregon
*Principal
Quest Investment Management*

REBECCA CAMDEN '17 (HON.)
Corvallis, Oregon

ERIC HOFFMAN '79
Portland, Oregon
*Operations Manager
Hoffman Construction Company*

DOUG LAYMAN '87
Bend, Oregon

DUANE MCDUGALL '74
Lake Oswego, Oregon

DIANE PADDISON '81
Dallas, Texas
*Founder & President
4Word*

BOB ROTHSCHILD '65
Corvallis, Oregon

ERIC SCHOENSTEIN '88
(Committee Chair)
Lake Oswego, Oregon
*Managing Director – Portfolio Director
Jensen Investment Management*

DAVE THOMPSON
Portland, Oregon
*President & CEO
TEC Equipment, Inc.*

STEVEN ZAMSKY '90
Darien, Connecticut
*COO of Fixed Income Commodities
Morgan Stanley*