



UNIVERSITY OF NOTRE DAME

THE 2004-2005 STEWARDSHIP REPORT

ABOUT THIS REPORT

The Office of Stewardship Programs, in conjunction with the University of Notre Dame's Department of Development, publishes this annual report to illustrate the fundraising activities of the University during the previous fiscal year. The stories within highlight specific accomplishments of charitable giving to five primary funding priorities—endowed chairs and directorships, financial aid, the Libraries at Notre Dame, Endowments for Excellence, and unrestricted giving—while detailed financial charts offer a closer look at each priority. We hope you enjoy learning more about how your gifts have made a lasting impact on the Notre Dame family.

On the Cover:

Stained-glass window in Keenan–Stanford Hall Chapel. Photograph by Catherine DeRue.

TABLE OF CONTENTS

1 Letter from the President

THE PRIORITIES

2 Endowed Chairs and Directorships

4 Financial Aid

6 The Libraries at Notre Dame

8 Endowments for Excellence

10 Unrestricted Giving

THE YEAR IN REVIEW

12 Financial Overview

13 Gifts and Pledges

14 Corporate, Foundation, and Matching Gifts

15 Planned Giving Support

16 Notre Dame Trustee Supports the Price of Excellence

17 The Obligation of Stewardship



FROM THE PRESIDENT

It is not a stretch to say that, today, excellence is a hallmark as much as an expectation of Notre Dame. It was not always so. Our present world-class enterprise began with Father Sorin and his confreres who, in the University's founding days, struggled heartily as they engaged in the humble task of teaching their young pupils to read and write.

Yet even then, Father Sorin embraced a vision of *L'Université de Notre Dame du Lac* as a place of erudition and of the deepest faith. He wanted it to be—and knew then that it could be—a great university and a profound force for good in the world. And he was right.

Notre Dame is now among the nation's top 20 institutions of higher learning. Our alumni, faculty, and students have made important contributions to the sciences and humanities. A number of centers and institutes on campus are home to some of the most advanced research in the world. Moreover, Notre Dame continues to be a leading voice in and for the Catholic Church.

But, as Trustee Jay Jordan notes on page 16, such excellence comes at a price. Our price has always been the sacrifice, perseverance, and generosity of legions of men and women who have embraced a common purpose: to advance Notre Dame even beyond Sorin's grand vision.

As I embark upon my tenure as president, I draw strength and inspiration from your willingness to pay the price for excellence. Your support has helped to cultivate our current successes and will lend momentum as we seek to become better in all that we do—in undergraduate education and research, in athletics and outreach, and in our response to the calling to be God's faithful servants.

Ours is an awesome responsibility: to provide students with not only a superior education, but also a sense of purpose and duty so that they might use their knowledge in service to God and the world. It is this responsibility which motivates me and, I imagine, is part of what inspires you to share your time and resources so graciously. For the latter, I will always be indebted to you.

A handwritten signature in black ink that reads "John Jenkins, C.S.C." The signature is written in a cursive, flowing style.

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

President



At left: Valetictorian Enrique Schaerer addresses his classmates at the May 2005 commencement ceremony. Below: The new gates on Notre Dame Avenue beckon visitors to campus.

In 1971, Notre Dame had just four named professorships, one in each of the four colleges. Now, there are more than 200 named professorships and directorships at Notre Dame. This significant increase is directly linked to the University's increased academic stature over the past several decades, for these world-class teachers and scholars not only enhance the quality of a Notre Dame education, they attract other distinguished faculty and the most ambitious students.

In fiscal year 2004–2005, donors recognized the importance of these endowed chairs with over \$3.8 million in support for named professors and directors in the University's four colleges, the Law School, the School of Architecture, and its various centers and institutes.

Endowed chairs such as the Dorothy G. Griffin Chair in Modern American Literature, which is the first endowed professorship in American literature at Notre Dame, have a tremendous impact on the quality of the University's academic programs. And their impact will endure. The holder of an endowed chair will touch the lives of thousands of students during his or her tenure—students who will go on to touch thousands more as they assume leadership roles in their respective fields.

ENDOWED CHAIRS & DIRECTORSHIPS



THE DOROTHY G. GRIFFIN CHAIR IN MODERN AMERICAN LITERATURE



Dorothy Griffin (pictured left) always loved Notre Dame, though “in my day,” she says, “they didn’t take girls.” She often visited campus with her husband, James T. Griffin, a member of the Class of 1934.

After his death, she returned with the idea of making a gift in his name, impressed not only by the beautiful campus but also by the pride of the Notre Dame community. “It’s hallowed ground, as far as I’m concerned,” she says. Following this visit, she established the James T. Griffin Scholarship at the University. Since then, she has made many generous contributions that reflect her interests in language and literature.

Dorothy was graduated in 1934 from the State University of New York-Albany with majors in French and English. She taught both subjects at Draper High School in Schenectady, New York, before her marriage to Jim. By endowing a collection of French poetry in the Hesburgh Libraries, she has significantly improved Notre Dame’s course offerings in French language, literature, and culture. She has also given the Libraries a valuable coin collection, complementing the collection started by the Rev. Edmund P. Joyce, C.S.C. Additionally, through her leadership on the Advisory Council for the Snite Museum and numerous gifts in support of fine-art acquisitions, she has enhanced the University’s permanent collection with priceless works.

In her will, Dorothy had bequeathed a chair in modern American literature. It occurred to her, however, that she would like Notre Dame students to enjoy the benefits immediately, which they could if the chair were installed sooner.

In the fall of 2005, the Dorothy G. Griffin Chair in Modern American Literature—the first endowed chair in American literature at Notre Dame—became a reality. The English department is currently seeking a distinguished scholar to fill the Griffin Chair—an outstanding undergraduate teacher whose renown will attract exceptional candidates for graduate work in American literature to Notre Dame. The Griffin Chair is expected to further strengthen the University’s reputation in both American literature and modern poetry.

Dorothy recently celebrated her 91st birthday. Since her years as a schoolteacher, she has become a distinguished business woman, serving as president of her family’s company, Varflex Corporation, a manufacturer of electrical insulating sleeving. She goes to the office every day, reads voraciously, and continues to correct her employees’ grammar.

“It keeps me thinking,” she says.

CASH GIFTS TO ENDOWED CHAIRS

By Fiscal Year

| | |
|-------|--------------|
| 00–01 | \$10,958,348 |
| 01–02 | \$5,356,245 |
| 02–03 | \$3,583,128 |
| 03–04 | \$3,961,510 |
| 04–05 | \$3,854,087 |

GROWTH IN ESTABLISHED ENDOWED CHAIRS AND DIRECTORSHIPS

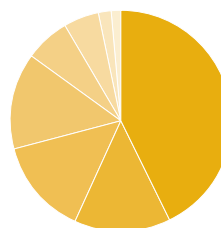
By Fiscal Year

| | |
|-------|-----|
| 00–01 | 207 |
| 01–02 | 208 |
| 02–03 | 210 |
| 03–04 | 210 |
| 04–05 | 213 |

DISTRIBUTION OF ESTABLISHED ENDOWED CHAIRS

As of June 30, 2005

| | |
|-----------------------------|----|
| College of Arts and Letters | 91 |
| College of Science | 30 |
| Mendoza College of Business | 30 |
| College of Engineering | 30 |
| Directorships | 14 |
| Law School | 11 |
| Other | 4 |
| School of Architecture | 3 |





At left: Scholarship and fellowship recipients gather in front of the Main Building to demonstrate an abundance of gratitude to their financial aid benefactors.

FINANCIAL AID — SCHOLARSHIP AND FELLOWSHIP ASSISTANCE

Scholarships and fellowships continue to be among the top funding priorities for Notre Dame — and benefactors continue to demonstrate their support of undergraduate and graduate students with generous contributions to financial aid.

Last fiscal year, 5,996 donors gave more than \$14 million for endowed and expendable undergraduate scholarships, and 1,764 donors gave \$2.5 million for endowed and expendable graduate fellowships.

For the last five years, the University has met the full demonstrated need of all admitted undergraduates. Last fiscal year, 1,459 undergraduate scholarships were awarded. The average, unduplicated aid from all sources currently totals \$22,612. However, because the typical package includes scholarships, grants, loans, and work-study income, students still graduate with an average need-based debt of \$18,500 to \$19,000 — down \$500 from last fiscal year. Graduate fellowships also draw from a variety of sources, with an average stipend ranging from \$9,800 to \$14,300, depending upon the college and program.

Parents, alumni, and friends of Notre Dame who give to financial aid, like Tom and Bridget Black, help cultivate a learning environment where fiscal concerns are secondary to intellectual pursuits, and where students are free to contemplate ultimate questions rather than compare aid packages.

THE TOM AND BRIDGET BLACK SCHOLARSHIP

When Tom Black ('76) left Buffalo, New York, for his freshman year at Notre Dame, money was tight. The son of a third-generation steelworker, only the David P. Kennedy and Notre Dame Club of Buffalo Scholarships made his four-year dream a reality. These were gifts he vowed to repay.

By establishing a scholarship at Notre Dame, Tom and his wife, Bridget, have accomplished this goal. Their gift will offer generations of students



the chance to receive the superior education Tom treasures—one that is rooted in a commitment to service and distinguished by the lifelong friendships formed in the residence halls.

The Blacks also wanted to give back to the community whose alumni club helped to make Tom's education possible. Each year, the Tom and Bridget Black Scholarship is awarded to a student from western New York State. The current recipient, Brian Wrona ('06), is not only from the area, he attended the same high school as Tom. According to Brian, that's not all they share.

"Like me, Mr. Black recognizes the unmatched excellence of a Notre Dame education," he says.

Brian, a senior majoring in finance, plays saxophone in the marching band. This fall, he was among the 27 students invited to enroll in the highly selective Applied Investment Management course. In this class, Brian will acquire valuable hands-on experience before embarking on a career in investment banking after graduation.

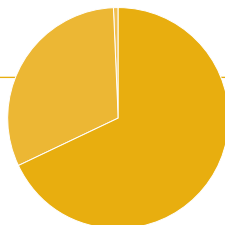
"This is just one of the many great opportunities I've been afforded by the Blacks, whose scholarship makes it possible for me to be a student at Notre Dame," says Brian.

Tom also remains grateful to those whose generosity allowed him to attend Notre Dame. "Because of them," he says, "my son can now have the same opportunities."

Ryan Black, a member of the Class of 2009, is pictured above with his parents.

SOURCES OF AID: GRADUATE \$86,991,854 Fiscal Year 2004–2005

- Fellowships and Grants \$59,099,925
- Loans \$27,291,060
- Work Study \$600,869



UNDERGRADUATE SCHOLARSHIP GIFTS

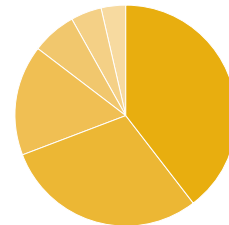
By Fiscal Year (Expendable and Endowed)

| | |
|-------|---------------|
| 00–01 | \$26,812,084* |
| 01–02 | \$25,529,346* |
| 02–03 | \$24,347,762* |
| 03–04 | \$19,062,428 |
| 04–05 | \$14,377,142 |

* Outside scholarships were included in these numbers

SOURCES OF AID: UNDERGRADUATE \$150,618,558 Fiscal Year 2004–2005

- University-administered Scholarships \$59,557,457
- Loans \$44,698,308
- Grants \$24,319,088
- Other Scholarships \$9,825,935
- ROTC \$6,795,804
- Campus Employment \$5,421,966



GRADUATE FELLOWSHIP GIFTS

By Fiscal Year

Includes MBA and Law (Expendable and Endowed)

| | |
|-------|-------------|
| 00–01 | \$4,802,208 |
| 01–02 | \$5,189,181 |
| 02–03 | \$3,022,039 |
| 03–04 | \$3,879,407 |
| 04–05 | \$2,509,378 |



At left: Second-year law student Jon Rosemeyer examines texts inside the Law Library of the Notre Dame Law School.

Academic libraries, thanks to increased emphasis on digitization, have become high-tech, interactive information centers, distinguished as much by their online presence and services as their physical collections of essential texts. Today, the Libraries at Notre Dame—comprising the main Hesburgh Library, its nine campus branches, and the Law Library—are accessible from students' dorm rooms and even from their hometowns around the world.

Donors have acknowledged the cost and importance of such technological advancements to a top-tier academic institution; last year, they gave nearly \$1.3 million to support Notre Dame's libraries.

Also especially important has been the enrichment of the Law Library, which is essential to the fulfillment of the Notre Dame Law School's mission to become one of the top law schools in the world. Key benefactions like John Mahoney's planned gift in honor of his brother, a labor law specialist, have significantly improved the collections of the Law Library, making possible advanced research and study in complex fields of legal scholarship.

THE LIBRARIES AT NOTRE DAME



THE ROBERT J. MAHONEY ENDOWED LAW LIBRARY COLLECTION IN LABOR LAW

The laws governing workplaces, unions, international labor agreements, and related topics are constantly expanding and changing. A prominent law library requires constant upgrading of labor law materials—including new electronic resources—in order to support scholarship in this complex and important field. The Robert J. Mahoney



Collection, created through a charitable bequest from the estate of John Patrick “Jack” Mahoney, Jr. ('38), supports that mission within the Notre Dame Law Library. It also honors a man who worked on behalf of laborers throughout his legal career.

Jack established the collection in honor of his brother, the late attorney Robert J. Mahoney ('40, '48 J.D.). Before entering law school at Notre Dame, Robert served in the U.S. Army in Italy, receiving the Purple Heart,

among other awards, and was honorably discharged in 1945. He went on to become a St. Joseph County deputy prosecutor and labor union leader, serving as president of Bendix Local No. 9 UAW-CIO in South Bend for three terms. He introduced the health care benefits contract that remains in use by the Bendix Aviation Corporation today.

Born in Ashtabula, Ohio, Robert lived in South Bend with his wife, Phyllis, for more than 50 years; they were devoted parishioners at St. Patrick's Catholic Church. He is remembered as a loving husband, father—to the Rev. Robert Mahoney, Maureen Harris, Kathleen Mahoney, Kevin Mahoney, and the late Melanie Barth—and grandfather. (Maureen, Kevin, and Kathleen are pictured above.) Robert was committed not only to the ethical practice of law but also to practicing his Catholic faith and providing a quality education for his children.

Jack Mahoney was a veteran of World War II and served in the Korean War as a Judge Advocate General (JAG). He remained in the reserves until retiring in 1972 as a colonel. In 1950, he opened a law practice in Ashtabula, his lifelong home, where he, like his brother, Robert, was a dedicated supporter of Catholic education and a passionate alumnus of Notre Dame.

LIBRARY CASH GIFTS

By Fiscal Year

| | |
|-------|-------------|
| 00-01 | \$2,588,175 |
| 01-02 | \$1,204,639 |
| 02-03 | \$1,560,810 |
| 03-04 | \$1,128,032 |
| 04-05 | \$1,287,601 |

GROWTH IN NAMED LIBRARY FUNDS

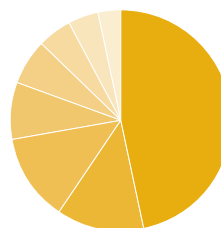
By Fiscal Year

| | |
|-------|-----|
| 00-01 | 146 |
| 01-02 | 154 |
| 02-03 | 167 |
| 03-04 | 169 |
| 04-05 | 180 |

NAMED LIBRARY FUNDS BY ACADEMIC AREA

As of June 30, 2005

| | |
|--|----|
| College of Arts and Letters | 84 |
| Unrestricted / General Library Endowment | 23 |
| Law Library | 23 |
| Other | 15 |
| Mendoza College of Business | 12 |
| College of Science | 9 |
| College of Engineering | 8 |
| School of Architecture | 6 |



At left: A newly installed recognition wall, located outside of the Provost's Office in the Main Building, honors those donors who have established an Endowment for Excellence at Notre Dame.



Supporting undergraduate research projects, innovative course development, internships, visiting lecture series, scholarly exchange programs and much more, the Endowments for Excellence program reflects the dynamism and creativity of the Notre Dame community—especially the donors who create these endowments.

Since the program's inception in 1997, Endowments for Excellence donors have contributed more than \$36 million to enrich the academic life of Notre Dame, creating 178 endowments across 18 departments, colleges, or centers. In April 2005, these donors were honored for their contributions at the program's inaugural recognition event, and a new Endowments for Excellence recognition wall was unveiled and blessed in the Main Building.

During fiscal year 2004–2005, donors contributed over \$1.6 million and created 19 new Endowments for Excellence. Such gifts make lasting contributions to every aspect of academic, community, and professional life at Notre Dame; they also touch many lives beyond the University and make a difference around the world. Often, they are personal reflections of their donors, addressing a cause or program close to their hearts. Others, such as the FedEx Endowment for Excellence, represent a partnership between like-minded institutions who share a mission, spirit, or common goal.

ENDOWMENTS FOR EXCELLENCE



THE FEDEX ENDOWMENT FOR EXCELLENCE IN ACCOUNTING AND FINANCE

FedEx Corporation's ethical business practices closely align with the approach of Notre Dame's Mendoza College of Business, and considering the company was the brainchild of a college student, its support of higher education seems natural. In 1965, Yale student Frederick W. Smith wrote a term paper on how the passenger route systems used by most airfreight shippers were economically inadequate.



He went on to suggest a system designed specifically for airfreight. By 1975, he had not only created a revolutionary business based on that undergraduate assignment, he had created a new industry. He had even coined a new verb: "to FedEx" a package is now interchangeable with "to ship it — fast."

Now one of the most recognizable brands in the world, FedEx has become known for ensuring transparency in its financial transactions and board-of-directors activities. Customers count on the reliability of the brand; employees depend

on it being a caring employer; and communities know that FedEx will be a good neighbor and a responsible corporate citizen. The company was also named one of "America's Best Charity Minded Corporations" by *Reader's Digest*.

While other corporations have become involved with the College of Business, FedEx has the distinction of creating the first Endowment for Excellence with a dual-disciplinary orientation. Enhancing the quality of both the accounting and finance departments with a focus on business ethics, the endowment supports fellowships and visiting professorships that will attract top-quality, credentialed faculty; student workshops with professors and consultants; guest lectures by distinguished authorities; and conferences or seminars that will bring industry experts to Notre Dame.

In 2004, FedEx's executive vice-president and chief financial officer, Alan B. Graf, Jr. (pictured above), traveled to Notre Dame to deliver the John Cardinal O'Hara lecture, titled "Building a Culture of Ethics in a Publicly-Traded Company." A shared commitment to ethical business practices isn't the only connection between Notre Dame and Graf: he is also a Notre Dame parent. His daughter, Carrie, graduated with the Class of 2005. He and FedEx's vice-president of internal audit, three-time Notre Dame parent Gene Bastedo ('73), were instrumental in facilitating this perpetual resource in the Mendoza College of Business.

CASH GIFTS TO ENDOWMENTS FOR EXCELLENCE

By Fiscal Year

| | |
|-------|-------------|
| 00-01 | \$3,206,838 |
| 01-02 | \$5,446,615 |
| 02-03 | \$1,710,509 |
| 03-04 | \$2,019,722 |
| 04-05 | \$1,615,978 |

GROWTH IN ESTABLISHED ENDOWMENTS FOR EXCELLENCE

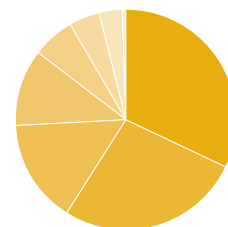
By Fiscal Year

| | |
|-------|-----|
| 00-01 | 83 |
| 01-02 | 108 |
| 02-03 | 124 |
| 03-04 | 159 |
| 04-05 | 178 |

DISTRIBUTION OF ESTABLISHED ENDOWMENTS FOR EXCELLENCE

As of June 30, 2005

| | |
|-----------------------------|----|
| College of Arts and Letters | 57 |
| Institutes and Centers | 48 |
| Other | 27 |
| Mendoza College of Business | 20 |
| College of Engineering | 11 |
| College of Science | 8 |
| Law School | 6 |
| School of Architecture | 1 |





At left: Presented by the Department of Film, Television and Theatre, Noel Coward's *Design for Living* was performed in the Regis Philbin Theatre in the Marie P. DeBartolo Center for the Performing Arts.

Unrestricted gifts, facilitated through the Annual Fund, are the lifeblood of Notre Dame's operations, with an impact as widespread as it is immediate. To illustrate: in one year, a \$10,000 unrestricted gift provides the rough equivalent of a \$200,000 endowment.

But smaller gifts of \$50, \$100, \$500, or \$1,000—the minimum annual gift required for membership in the Edward Frederick Sorin Society—also amount to a substantial contribution, helping to underwrite everything from the performing arts and undergraduate scholarships to technology upgrades and campus maintenance. A \$100 unrestricted gift contributes as much to the annual budget as a \$2,000 endowed fund. The collective impact of smaller gifts demonstrates that every gift counts, no matter the size.

In fiscal year 2004–2005, unrestricted giving to Notre Dame reached an all-time high of \$22.9 million, reflecting the excitement of alumni, friends, faculty, and staff as the University began a new era under the guidance of Fr. John Jenkins.

UNRESTRICTED GIVING



THE EDWARD FREDERICK SORIN SOCIETY

Honoring those who give a minimum of \$1,000 annually, the Edward Frederick Sorin Society is Notre Dame's largest source of unrestricted dollars. When Father Malloy assumed office in 1987, the Society was at nearly 3,000 members. By the time Father Jenkins took over last July, their numbers had exceeded 9,000. More than 2,000 of those donors give at the Founder's Circle level (\$3,000 annually), and 82 have established Legacy membership with annual gifts of \$10,000.



In the last fiscal year alone, Sorin Society members gave \$13,897,093.

But the bulk of that sum came from smaller—though no less important—gifts. Peter Kenny ('03) (pictured left) joined the Sorin Society in 2004 with a \$1,000 pledge.

A recent graduate working as a financial analyst for JPMorganChase's commercial banking division and living in New York, Peter, like many of his classmates, is beginning to pay back student loans and struggling to get on his feet. Still, his annual pledge works out to about \$19 a week, so he says if he brown-bags his lunch twice, he's got it covered.

"So many of us feel a void when we graduate," he continues. "If you become a donor, you are truly helping this place to be what it is. It's a whole new level of involvement, and it strengthens your love and connection."

In February 2004, Peter was among the hundreds of Sorin members invited to Notre Dame for the society's recognition weekend, which highlighted the new Marie P. DeBartolo Center for the Performing Arts and included special presentations by Father Malloy, Executive Vice-President John Affleck-Graves, several undergraduate and graduate students, and Sorin Society Chairman Bill Shaw ('67), University Trustee and CEO of Marriott International, Inc. One of the highlights for Peter was Affleck-Graves's presentation of the University's 10-year plan. "I realized how dependent Notre Dame is upon alumni and other benefactors," he says. "We young alumni will soon be on the front lines, and we will have to do our part."

ANNUAL FUND

By Fiscal Year / In Millions

| | | |
|-------|--------|--------|
| 00-01 | \$11.9 | \$23.1 |
| 01-02 | \$11.9 | \$23.1 |
| 02-03 | \$12.7 | \$25.9 |
| 03-04 | \$12.8 | \$27.2 |
| 04-05 | \$13.9 | \$28.2 |

- Sorin Society Cash Revenues
- Total Cash Revenues

ALUMNI PARTICIPATION RATE

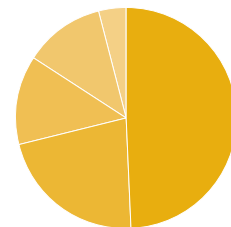
By Fiscal Year

| | |
|-------|-------|
| 00-01 | 50.1% |
| 01-02 | 48.7% |
| 02-03 | 50.9% |
| 03-04 | 50.4% |
| 04-05 | 50.0% |

ANNUAL FUND | \$28,186,567

Fiscal Year 2004-2005

- Sorin Society \$13,897,093
- Direct Mail \$6,152,004
- Other \$3,627,139
- Matching Gifts \$3,374,472
- Phone Center Pledge Payments \$1,135,859



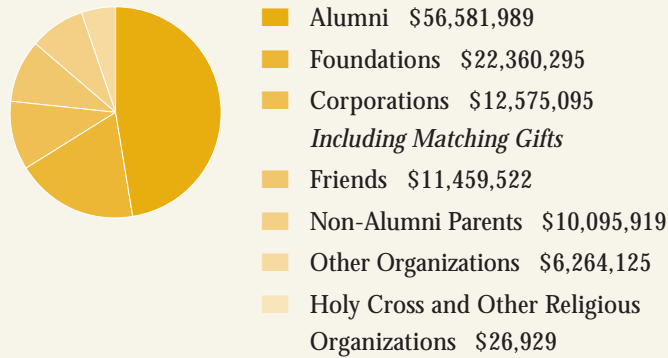
FINANCIAL OVERVIEW

Despite major changes anticipated at the highest levels of administration, charitable giving to Notre Dame remained strong in fiscal year 2004–2005; contributions totaled more than \$119.3 million.

While that figure falls short of the previous year’s \$173.6 million—which reflected an historic \$50 million bequest from Joan Kroc—new heights were reached in other areas of support. Pledge totals were among the highest garnered in the University’s history, and alumni participation remained characteristically robust, with the Class of 1955 breaking an institutional record—77.8 percent made a gift, totaling \$804,599.02, in honor of their 50th reunion.

SOURCES OF SUPPORT | \$119,363,874

Fiscal Year 2004–2005



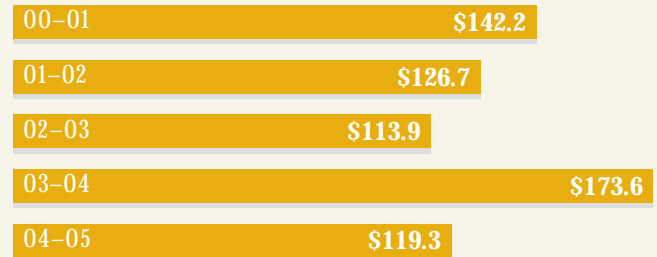
GIFT DISTRIBUTION | \$119,363,874

Fiscal Year 2004–2005



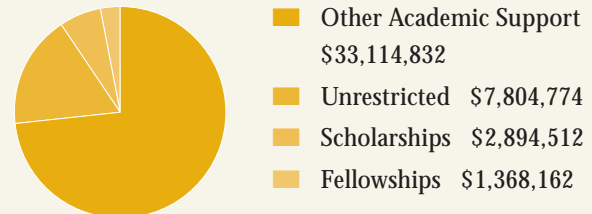
TOTAL DOLLARS RAISED

By Fiscal Year / In Millions



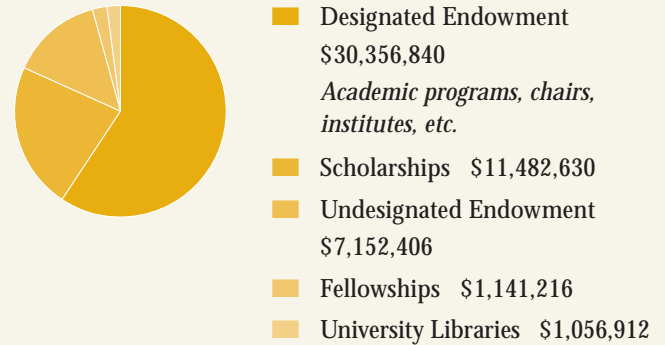
EXPENDABLE GIFTS | \$45,182,280

Fiscal Year 2004–2005



ENDOWMENT GIFTS | \$51,190,004

Fiscal Year 2004–2005

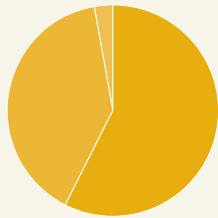


GIFTS & PLEDGES

Outright cash gifts totaled nearly \$69 million last year, and new pledge commitments of more than \$80 million also reflected excitement about Notre Dame's future. A record number of these new pledges were for amounts of \$10 million and more.

GIFT INCOME BY GIFT TYPE | \$119,363,874

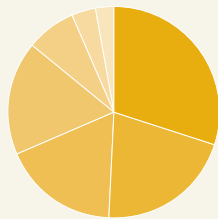
Fiscal Year 2004-2005



- **Outright Gifts** \$68,563,988
Cash gifts that are not connected to a pledge.
- **Pledge Payments** \$47,425,414
Cash gifts directed against existing commitments.
- **Matching Gifts** \$3,374,472
A corporate or foundation cash gift which matches an employee gift.

GIFT INCOME BY PROGRAM | \$119,363,874

Fiscal Year 2004-2005



- **Other Gifts and Pledge Payments by Individuals** \$35,782,796
- **Annual Fund** \$24,812,095
Excludes Matching Gifts
- **Planned Giving** \$21,191,790
- **Foundations** \$20,763,896
- **Corporations** \$9,064,123
- **Organizations** \$4,374,702
- **Matching Gifts** \$3,374,472



LEADERSHIP GIFTS (\$100,000+)

By Fiscal Year

| | |
|-------|-----|
| 00-01 | 192 |
| 01-02 | 166 |
| 02-03 | 153 |
| 03-04 | 170 |
| 04-05 | 163 |

LEADERSHIP PLEDGES (\$100,000+)

By Fiscal Year

| | |
|-------|-----|
| 00-01 | 95 |
| 01-02 | 76 |
| 02-03 | 103 |
| 03-04 | 69 |
| 04-05 | 120 |

CORPORATE, FOUNDATION & MATCHING GIFTS

Continued strong relationships with corporations and foundations resulted in \$34.8 million in gifts last year. Notre Dame's matching gift program was ranked first in dollar amount raised among all institutions in 2004, netting more than \$3.3 million from 655 companies.



CORPORATE SUPPORT

By Fiscal Year / Includes Gifts-in-Kind and Matching Gifts

| | |
|-------|--------------|
| 00-01 | \$12,835,226 |
| 01-02 | \$13,000,920 |
| 02-03 | \$14,661,325 |
| 03-04 | \$12,676,117 |
| 04-05 | \$9,064,123 |

FOUNDATION SUPPORT

By Fiscal Year

| | |
|-------|--------------|
| 00-01 | \$26,429,943 |
| 01-02 | \$26,326,640 |
| 02-03 | \$26,696,124 |
| 03-04 | \$22,702,327 |
| 04-05 | \$20,763,896 |

MATCHING GIFT TOTALS

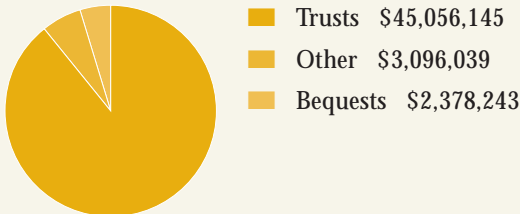
By Fiscal Year

| | |
|-------|-------------|
| 00-01 | \$3,656,229 |
| 01-02 | \$3,492,693 |
| 02-03 | \$3,364,750 |
| 03-04 | \$3,440,420 |
| 04-05 | \$3,374,472 |

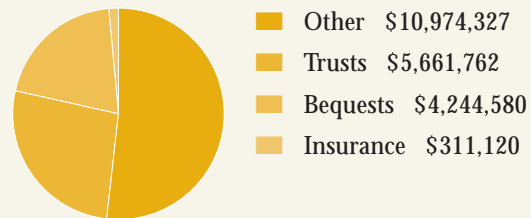
PLANNED GIVING SUPPORT

Planned giving continues to be an important source of funding for the University, contributing over \$21.1 million last year. A planned gift of \$40 million, announced in February 2005 by Notre Dame Trustee and alumnus Jay Jordan, was the second-largest ever committed to the University. New in 2005, charitable gift annuities—which provide charitable tax deductions and guaranteed lifetime income—generated \$6.3 million.

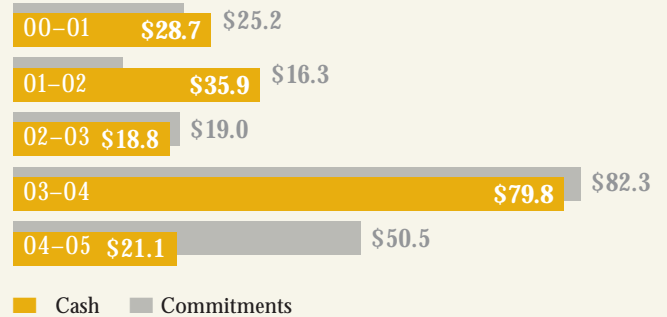
PLANNED GIVING
TOTAL COMMITMENTS | \$50,530,427
Fiscal Year 2004–2005



PLANNED GIVING CASH TOTALS | \$21,191,789
Fiscal Year 2004–2005



PLANNED GIVING SUPPORT
By Fiscal Year / In Millions





Notre Dame Trustee Supports the

PRICE OF EXCELLENCE

McKenna Hall erupted in prolonged applause when John W. "Jay" Jordan II ('69) made a surprise announcement to the Board of Trustees at their annual winter meeting: he planned to give \$40 million to Notre Dame, which would be the second-largest gift ever received by the University.

Jordan, who is the founder of the Jordan Company, a private investment firm, and chairman and chief executive officer of the holding company Jordan Industries Inc., has already made many significant contributions to Notre Dame. With this planned gift, he surpassed Joan Kroc's lifetime donation of \$69.1 million to become the most generous benefactor in University history.

While the ultimate designation of the gift remains undecided, the Jordan name is already recognizable on campus. In addition to his leadership on the Board of Trustees and past chairmanship of the Advisory Council for the College of Business, Jordan was a principal benefactor for the Mendoza College of Business; the auditorium within

that building bears his name. He was also the principal benefactor for the new \$70 million Jordan Hall of Science, currently under construction on the eastern edge of campus, just north of the Joyce Center. The new home of the College of Science and the Preprofessional Studies Program will include 40 undergraduate laboratories, two 250-seat lecture halls, a multimedia lecture hall, classrooms, faculty offices, a greenhouse, herbarium, and an observatory. It is scheduled for completion in the summer of 2006.

Jordan sees these new initiatives as integral to Notre Dame's increased stature, not only within the academy, but throughout the world. "We are not just an academic institution," he says. "We represent the true values of life itself. In order for us to fulfill our responsibility as a leader in the cultural landscape and sustain our position among the world's top universities, we have to be excellent in every way, and excellence comes at a price."

Noting Jordan's continued leadership and past gifts, Notre Dame President Rev. John I. Jenkins, C.S.C., said, "Jay's unselfish devotion to his alma mater is remarkable. The commitment and insight that he brings to our Board of Trustees is a source of inspiration to all of us at the University. He can take great comfort in considering the generations of Notre Dame students who will reap the benefits of his contributions in so many ways."

Two of Jordan's three children have earned undergraduate degrees from Notre Dame: J.W. received a degree in finance from the Mendoza College of Business in 2001, and Jennifer received a degree in film, television and theatre from the College of Arts and Letters in 2003. He and his wife, Gretchen, live in Chicago.

In fiscal year 2004–2005, the cost of fundraising was 10 cents of each dollar raised. Over the last five years the average cost of fundraising has been 8 cents of each dollar raised.

THE OBLIGATION OF STEWARDSHIP

As a reminder of our obligation to effectively steward contributions made to Notre Dame, the University adheres to the following guidelines:

- All gifts should be acknowledged in a timely and personal manner.
- A contribution accepted with a restricted purpose must be used for that purpose.
- If the University finds itself unable to utilize a contribution for its stated purpose, this should be communicated with the donor so that an alternative usage can be arranged or the contribution returned.
- Whenever feasible, and especially with endowment gifts, annual “impact” reports should be given to the donor.
- Proper recognition should always be given to the donor, and public recognition must be approved by the donor.
- The value of any “substantial” benefits as a result of contributions must be reported to each contributor.
- Contributions will be accounted for using universally-accepted accounting standards, allowing for maximum efficiency and productivity of each gift.

Thank you for your enduring support
of the University of Notre Dame.



For more information, please call or write:

UNIVERSITY OF NOTRE DAME

Office of Stewardship Programs
1100 Grace Hall
Notre Dame, Indiana 46556-5612

574/631-8689 *telephone*

574/631-8325 *fax*