

# STEWARDSHIP REPORT

## 2019—2020



### 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.



# GIFTS TO THE ACADEMY

**Total: \$198,237,985**

- Office of the Provost  
**\$29,513,910**
- Keough School of Global Affairs  
**\$25,659,095**
- College of Arts & Letters  
**\$24,519,537**
- College of Engineering  
**\$22,839,438**
- Mission  
**\$22,084,594**
- Office of Research  
**\$19,775,881**
- College of Science  
**\$19,628,382**
- Mendoza College of Business  
**\$13,938,385**
- Law School  
**\$7,522,402**
- Arts  
**\$4,073,897**
- Hesburgh Libraries  
**\$3,205,961**
- Office of Internationalization  
**\$2,174,726**
- School of Architecture  
**\$1,848,287**
- Graduate School  
**\$697,066**
- Provost - Undergraduate Studies  
**\$480,124**
- First Year of Studies  
**\$276,300**

## Gifts to Professorships and Directorships

BY FISCAL YEAR/IN MILLIONS/ENDOWED GIFTS ONLY



Unless otherwise indicated all numbers reported throughout this publication represent cash received in fiscal year 2019 - 2020

## RYAN FAMILY LEGACY

In 1914, after witnessing rampant workplace injury and death during his time at the U.S. Bureau of Mines, John T. Ryan Sr. co-founded the Mine Safety Appliances Company. He felt that a life spent preventing such disasters would be well spent. In doing so, he made the world a better place while building a prospering business. When John "Jack" T. Ryan Jr. took over in 1953, he expanded MSA's impact to one of global proportions while carrying forward his father's commitment to ethical leadership.



Three generations of the Ryan family

Irene O'Brien—Jack's high school classmate—became a proud "subway alum" early in life watching her brother play Fighting Irish football in the 1930s. After her graduation from Carnegie Mellon in 1939, she and Jack married. Her enthusiasm for Notre Dame became their shared passion, one they would pass on to their children—John III '65 (later CEO of MSA), Irene (Trinity College '66), Michael '69, Daniel '71, Julia '75, and Bill '77.

The Ryans built friendships with Fr. Hesburgh and Fr. Malloy, and their relationship with the University flourished. Jack and Irene's generosity was the foundation of nearly 40 years of research technology innovation at the Hesburgh Libraries. While Jack served as a trustee as well as the co-chair of the Campaign for Notre Dame in 1975—which was Notre Dame's most successful fundraising effort to date—Irene became a major supporter of many University activities, including the globally-recognized Shakespeare programs.

Jack passed away in 1995. When Irene joined her husband at the gates of Heaven in 2004, her estate gifted the University with MSA stock, the dividends of which yielded tremendous support for the Hesburgh Libraries, a business ethics professorship, the creative directorship of the Notre Dame Shakespeare Festival, and more. The sale of that stock in 2017 provided for the continued impact of these funds, as well as for the creation of nine new endowments in areas including athletics, business, Irish Studies, and financial aid.

What began as an effort to reduce suffering and aid those in need has become a permanent family legacy at Our Lady's University, one that changes lives every day. Jack and Irene Ryan's story proves that one need not be an alum to exemplify the best of Notre Dame—the only prerequisites are a generous spirit, a faithful heart, and a dedication to serving God and one's fellow human beings in all parts of life.

### MARC JOHNSON '21

"When I find myself studying into the late hours of the night and enjoying every moment, I am so grateful to be studying at one of the nation's premier institutions. I have become part of a tight-knit community throughout the country, and in previous semesters I've been able to take on incredible opportunities to study abroad, tutor first-year students in physics, visit innovative companies like SpaceX, Northrop Grumman, and Raytheon, and more. I cannot express enough my gratitude to the Ryan Family for making it possible, through financial aid, for students like me to be welcomed into the Notre Dame family."



Marc Johnson '21 (right) with friends

# KAREN KUENSTER SCHOLARSHIP FOR HESBURGH WOMEN OF IMPACT

"If I could go back and redo my college experience, there is nowhere else I would choose to go," says Karen Kuenster '77. "Notre Dame has been an important part of my professional and personal life." Karen belongs to the first generation of Notre Dame women—hers was only the second graduating class to include female students. She went on to obtain a law degree, and afterward made partner at both Baker McKenzie and Deloitte in Chicago.

Longtime supporters of the Sorin Society, Karen and her husband, Jim Osick, recently decided to make Notre Dame part of their will. Their bequest will one day establish the Karen Kuenster Scholarship for Hesburgh Women of Impact, designed to help female business students find their passion, love what they do, and take hold of every opportunity to succeed.

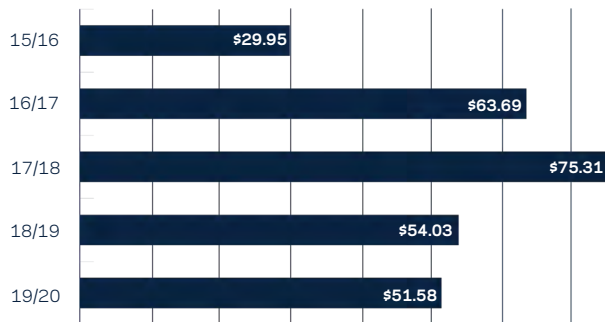


Karen Kuenster '77 & Jim Osick

"It is so important for women to lift one another up, especially in the business world," Karen says. "This scholarship allows me to invest in the women of Notre Dame through the gift of an education. When I was a student, I was the recipient of financial aid, and I'm thrilled to be able to give back in this way."

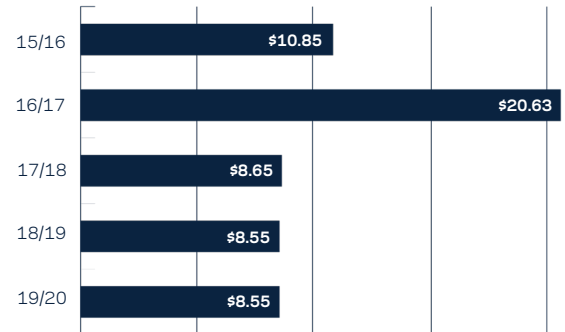
## GIFTS TO UNDERGRADUATE SCHOLARSHIPS

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



"I am thankful for the privilege of being a Hesburgh Women of Impact Scholar. As an electrical engineering major, it's oftentimes easy to feel out of place with the gender ratios in my classes. However, I have taken advantage of many female-empowering opportunities offered at Notre Dame. I am actively involved in two all-female clubs: the Society of Women Engineers and HerCampus, where I hold a leadership role on the executive board. I have a lot of respect for the women who came to Notre Dame before me, and I am grateful to them for paving the way for students like me."



CALLIE KING '23



# PULTE INSTITUTE FOR GLOBAL DEVELOPMENT

In 1994, Fr. Don Vettese, Jesuit priest and founder of International Samaritan, invited Bill and Karen Pulte to visit Guatemala City. There they were horrified to witness the state of housing faced by those dwelling on the outskirts of an immense garbage dump—hundreds of families reduced to living in dirt-floor shacks built from found materials. Malnutrition and disease were rampant.



Bill Pulte

It was no coincidence that the Pultes were asked to visit the site of such dire and dangerous poverty. Bill, a master builder, was a native of Detroit—a city with its own history of housing woes—who had spent six decades growing Pulte Homes, today the PulteGroup, a successful construction and real estate company. He recognized immediately the need for shelter and began a series of charitable endeavors that would provide housing, a nursery, and other key resources for those living on the landfill's edge.

Though Bill passed away in 2018, his family of 14 children, 27 grandchildren, and numerous great-grandchildren carry on his legacy of active philanthropy. In 2019 the Pulte Family Charitable Foundation established a partnership with Notre Dame to expand a global network of researchers, students, innovators, and professionals dedicated to creating effective and lasting solutions to break the cycle of poverty. The Foundation's benefaction spans a number of campus departments and institutes, including the Pulte Institute for Global Development, the Keough School of Global Affairs, the Wilson Sheehan Lab for Economic Opportunities, iLabs, the Fighting Irish Initiative, financial aid, and more. Today Our Lady's University stands ready to uplift communities worldwide, thanks to the extraordinary generosity of the Pulte family.

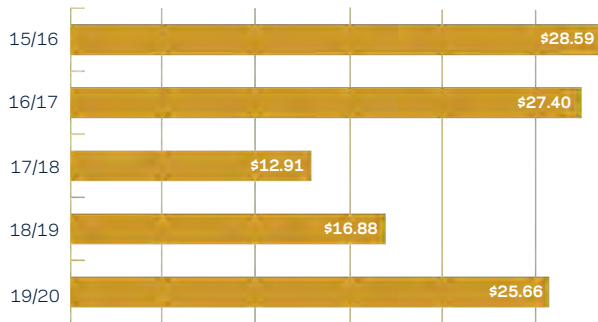


NICOLAS SALADINO '21

"Working with the Pulte Institute has been an amazing experience that has provided me with opportunities I would never otherwise receive on campus. Being able to conduct research internationally has given me a global perspective. I will always cherish the days I spent in Colombia bringing clean water to the people of Arcabuco. It was a time of great personal growth and academic development, and being able to positively impact the local community was incredibly fulfilling."

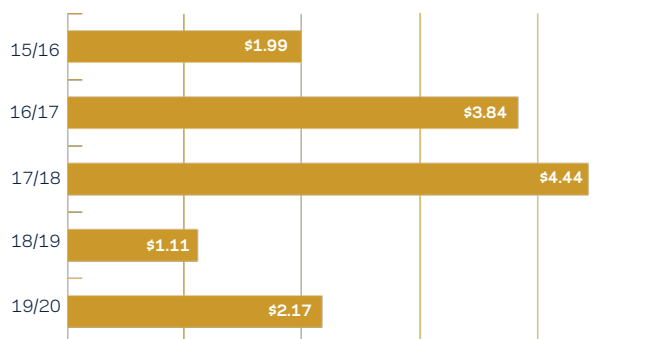
## GIFTS TO THE KEOUGH SCHOOL OF GLOBAL AFFAIRS

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



## GIFTS TO NOTRE DAME INTERNATIONAL

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



# LILLY ENDOWMENT INC.



**Lilly Endowment Inc.**  
A Private Philanthropic Foundation

Since 2007, Lilly Endowment Inc. has supported six select Indiana community and economic development initiatives designed to build collaboration between local organizations, educational institutions, and related groups to enhance the prosperity of a given region.

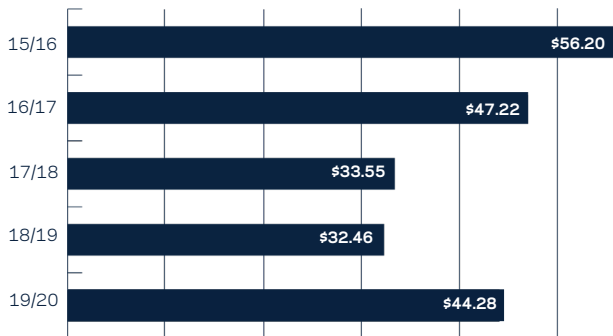
In April 2019, the Labs for Industry Futures and Transformation (LIFT) Network became the most recent of these. LIFT brings together the University of Notre Dame and the South Bend-Elkhart Regional Partnership (SBERP) to unlock the region's potential as a center for the kind of high-tech manufacturing, entrepreneurship, and data services that will drive tomorrow's economy. Lilly Endowment's grant has shifted these efforts into high gear.

When the award was announced, Notre Dame President Rev. John I. Jenkins, C.S.C., expressed gratitude for Lilly Endowment's "encouragement of the fundamental rethinking that is often needed to respond to new challenges and changing circumstances."

LIFT has been busy using the grant funding to jump-start key areas of its mission. Chief among them is iNDustry Labs at Notre Dame, the University's dedicated platform for collaboration with regional industry and institutional partners. iNDustry Labs serves local businesses and their employees with strategic insights, access to talent, and technical resources to help them thrive in the digital age of industry.

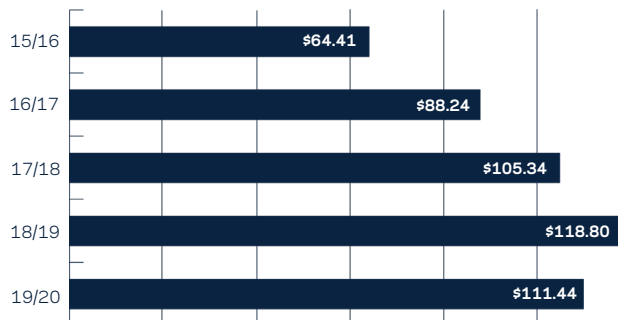
## CORPORATE SUPPORT

BY FISCAL YEAR/EXCLUDES CORPORATE FOUNDATIONS AND MATCHING GIFTS/IN MILLIONS



## FOUNDATION SUPPORT

BY FISCAL YEAR/INCLUDES FAMILY FOUNDATIONS/EXCLUDES MATCHING GIFTS/IN MILLIONS



A unique team with senior industry experience and a multidisciplinary cohort of faculty has been recruited to lead implementation of the platform. LIFT funding is also expanding the University's capabilities in advanced analytics, mechanical engineering, advanced materials, and industrial design, among other fields.

This winter, the first phase of the Engineering Innovation Hub will open in Cushing Hall, an \$11M state-of-the-art facility set to develop innovative product solutions for industry partners and to provide project-based learning opportunities for students and the broader community. LIFT funds have been matched through the generous support of University benefactors including the Barabi family, the Little family, the Tom Reilly Endowment for Excellence, and the President's Circle. In addition, several members of the Notre Dame alumni community have been valuable sources of counsel through the planning and execution of the LIFT initiative.

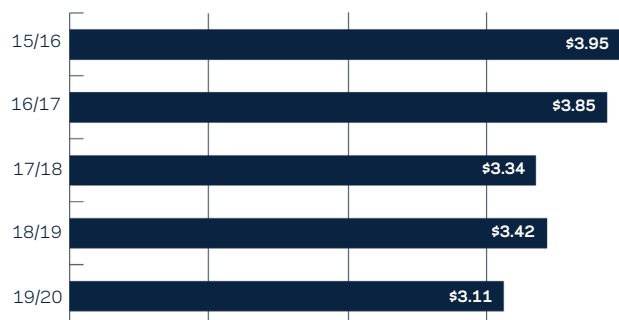
LIFT is a truly regional initiative. In addition to activity at Notre Dame, LIFT has provided critical funding to expand the region's innovation infrastructure, leveraging \$50 million of additional capital investment supporting operations including the Ivy Tech iFlex Lab, the Elkhart Area Career Center, and the St. Joseph County's Community Learning Center.

Notably, the network's capabilities were directed toward relief efforts in the early days of the COVID-19 crisis—a large-format laser cutter was purchased and used to create much-needed personal protective equipment for healthcare workers and other essential personnel. Going forward, the equipment will allow manufacturing partners to craft specialized components and perform rapid prototyping of new products, further accelerating the pace of innovation.

"All of us share a common, hopeful vision for our region's future," Fr. Jenkins said. "We who live and work in the region know that a quiet transformation is underway, and that the Lilly Endowment grant is a powerful catalyst for a brighter, more resilient future."

## MATCHING GIFT TOTALS

BY FISCAL YEAR/IN MILLIONS





# KEN AND JOYCE ADAMSON GRANT-IN-AID FOR NOTRE DAME WOMEN'S BASKETBALL AND NOTRE DAME FOOTBALL

Though Ken Adamson '60 played football at Notre Dame, Joyce Adamson explains that her own dedication to Irish Athletics goes back further than her marriage. "I loved Notre Dame football long before I ever met Ken while I was a student at Saint Mary's College," she laughs. "Growing up in a Catholic family in the midwest meant you were raised to love this school and cheer for the Irish on football Saturdays."



Joyce and Ken Adamson '60 with their grandchildren, Elizabeth '17 and Kenny '15

The Adamsons have long blessed the University with their philanthropy, but their recent decision to include generous bequests to Notre Dame in their estate plan ensures that their legacy will endure for generations to come. Joyce's passion for music translated into planned gifts supporting the performing arts and the Glee Club, while Ken's history made establishing a grant-in-aid for Notre Dame Football a clear choice. Another future gift—a grant-in-aid for Women's Basketball—was inspired by Elizabeth '17, their second grandchild to graduate from the University—who served as manager for the team as an undergraduate.

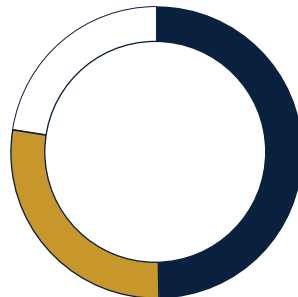
"We always wanted to make Notre Dame the 'fourth child' in our estate because it has given us so much over the years," says Ken. "We also know that our gift will be stewarded well. It's an honor to provide a Notre Dame education for these hardworking, disciplined student-athletes and to boost the University's rich arts tradition. We hope that the students who benefit will one day be able to pay it forward in some way."

## GIFTS TO ATHLETICS

FISCAL YEAR 2019-20

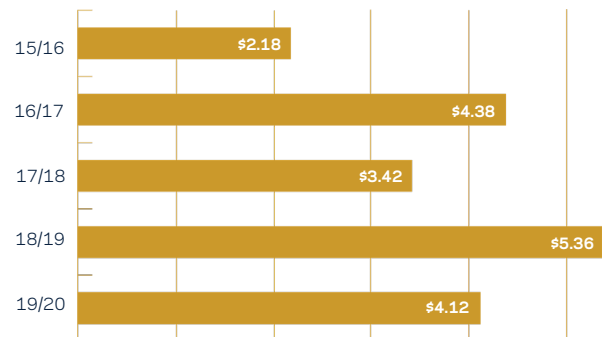
**Total: \$46,025,235**

- **CAPITAL**  
\$22,926,420
- **ENDOWMENT**  
\$12,723,223
- **EXPENDABLE**  
\$10,375,592



## GIFTS TO ATHLETIC GRANTS-IN-AID

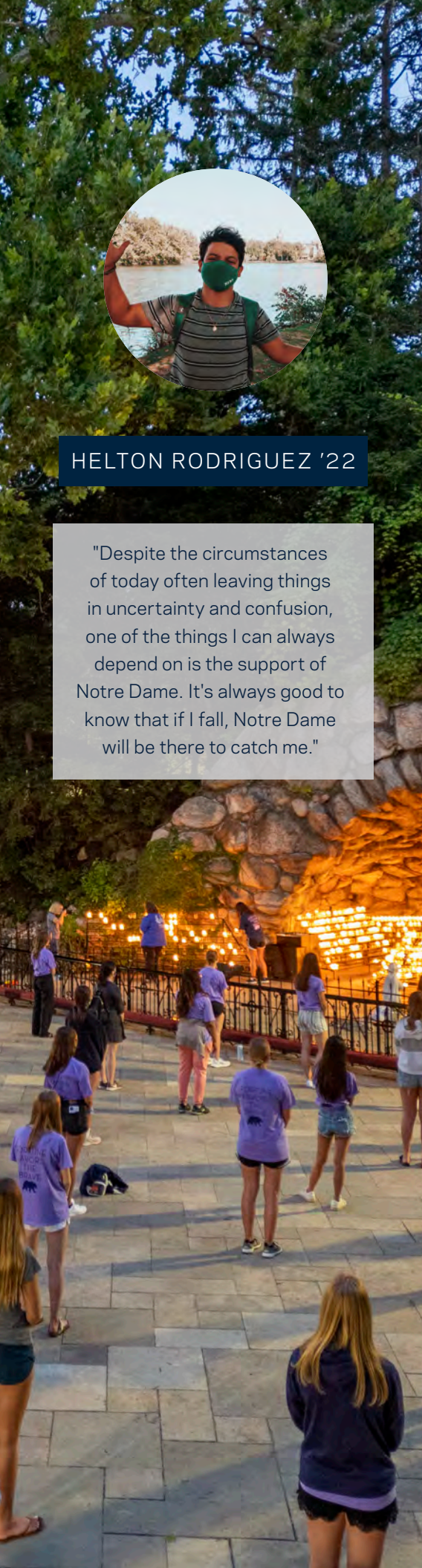
BY FISCAL YEAR/IN MILLIONS/ENDOWED AND EXPENDABLE



**COACH NIELE IVEY**  
Karen & Kevin Keyes Family Head Coach,  
Women's Basketball

"Athletic grants-in-aid are a key resource in making it possible for talented student-athletes to attend Notre Dame and compete for the Fighting Irish. Not only does this have a huge impact on the lives of the students, but it helps in building strong teams who benefit from having these individuals on board."





**HELTON RODRIGUEZ '22**

"Despite the circumstances of today often leaving things in uncertainty and confusion, one of the things I can always depend on is the support of Notre Dame. It's always good to know that if I fall, Notre Dame will be there to catch me."

## STUDENT EMERGENCY RELIEF FUND

Phyllis '80 and Jim Stone '81 and their steadfast generosity to Notre Dame is driven by the conviction that those who have reached to higher heights should "reach back and pull up those in need," just as so many others did for them.



*Phyllis '80 and Jim Stone '81*

The Stones met as students at Notre Dame. A backgammon lesson from Phyllis to Jim blossomed into a love that has endured ever since. For Jim, the opportunity to attend Notre Dame was made possible through a football scholarship, while for Phyllis, a Notre Dame education was made possible by donors to financial aid, whose kindness the couple has never forgotten. One such individual proved particularly memorable. When Phyllis faced an outstanding balance standing in the way of her participation in Commencement exercises, Father Hesburgh himself stepped in to clear that final roadblock on the path to graduation. "I know how it feels to hear that someone cared enough to reach out and help, and in my case it happened to be Father Ted, which will always be so special," Phyllis says. In supporting financial aid, she and Jim are able to share that feeling with new generations of students.

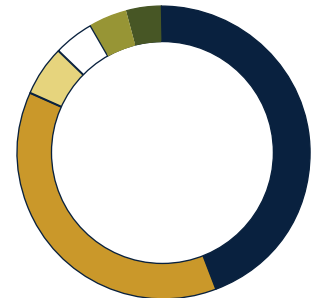
Today, Phyllis—as a member of the Board of Trustees—emphasizes the importance of Notre Dame's newest major aid initiative, the Student Emergency Relief Fund, 100 percent of which directly benefits students whose financial aid status has been adversely affected by the global pandemic. Phyllis and Jim provided foundational support for the fund. "We were really impressed with how quickly the University stepped up to help students who were faced with challenges completing their spring semester remotely due to Covid-19.," says Phyllis. "The call to contribute felt like a request from family, not a solicitation. Jim and I think of contributing to this fund as a potluck dinner. If every member of the Notre Dame family brings one dish to the table, there will be more than enough for everyone."

### GIFTS TO STUDENT LIFE

FISCAL YEAR 2019-20/ENDOWED, EXPENDABLE, CAPITAL & GIFTS-IN-KIND

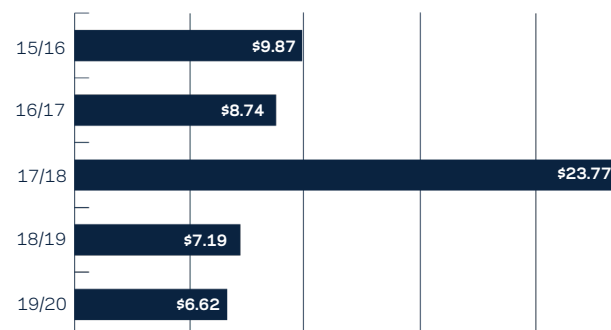
**Total: \$6,619,394**

- Alumni **\$2,937,329**
- Foundations **\$2,475,853**
- Parents **\$376,949**
- Friends **\$289,090**
- Organizations **\$272,449**
- Corporations **\$267,724**



### GIFTS TO STUDENT LIFE

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





# LEITTEN FAMILY SCHOLARSHIP



The Leitten Family from left: Peter, Kevin '82, Christopher '17, Lisa, and Matthew

"There is a large contingent of homeschooled kids who are bright, talented, and resourceful that can positively contribute to the Notre Dame community, yet they are unsure how to effectively navigate the application process at the more prestigious universities across the country. As a result, these students and their parents simply forego the idea," says Kevin Leitten '82. Determined to make a difference, Kevin and his

wife, Lisa (SMC '83), created a charitable remainder trust providing for the Leitten Family Scholarship. The Leittens met when Kevin was at Notre Dame and Lisa was at Saint Mary's, and they have been steadfast supporters of Our Lady's University for their entire 35 years of marriage.

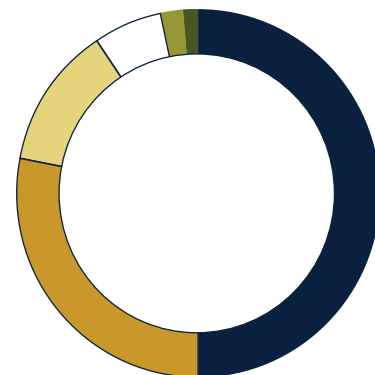
With this new gift, they hope to make the University more accessible to homeschooled students like their children. Their three sons were all accepted into private universities, have successful careers, and have lived and traveled all over the world; one is even a member of Notre Dame's Class of 2017. "We want to demonstrate that there is a way, we have done it, and we know it can work," explains Kevin. "Notre Dame is such a special place, and building a clearer path for these students is something we are convinced will add value to their lives."

## GIFT PLANNING CASH TOTALS

FISCAL YEAR 2019-20

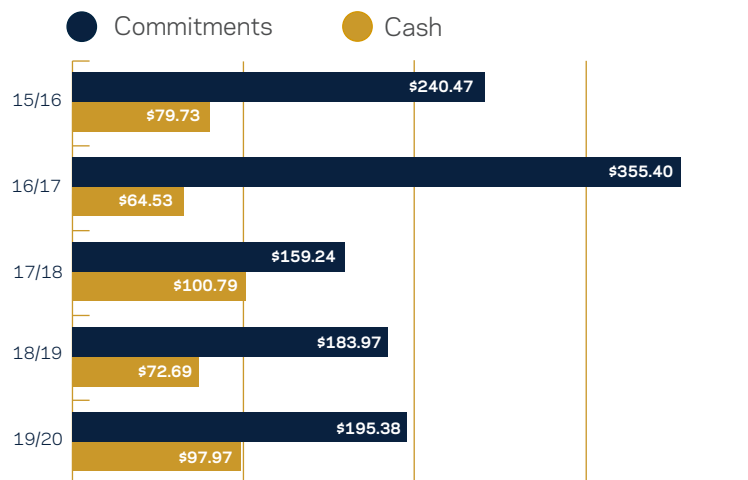
**Total: \$97,974,165**

- Donor Advised Funds **\$48,265,950**
- Trusts **\$27,506,712**
- Bequests **\$12,495,614**
- IRA Charitable Rollovers **\$6,658,384**
- Charitable Gift Annuities **\$1,705,749**
- Other **\$1,341,756**



## GIFT PLANNING SUPPORT

BY FISCAL YEAR/IN MILLIONS



"I am here today, attending my dream school, because of the generosity of the Notre Dame family. Financial aid made it possible for me and my sister to attend Notre Dame when we did not think it would be financially feasible. My time on campus has been enriching, formative, and eye opening, I am forever indebted and grateful!"

HELEN '22 AND AGGIE '21 LABOE



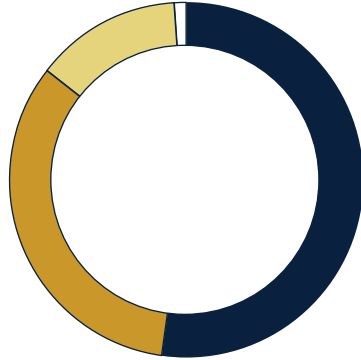
# FINANCIAL OVERVIEW

## GIFT DISTRIBUTION

FISCAL YEAR 2019-20

**Total: \$466,186,920**

- Endowment  
**\$243,766,595**
- Expendable  
**\$155,003,541**
- Capital  
**\$62,158,906**
- Gifts-In-Kind  
**\$5,257,878**

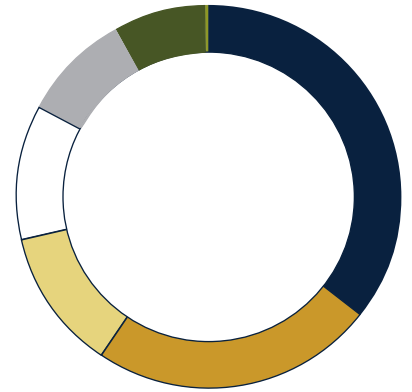


## SOURCES OF CASH RECEIPTS

FISCAL YEAR 2019-20

**Total: \$466,186,920**

- Alumni  
**\$165,007,001**
- Foundations  
**\$111,554,273**  
*Includes family foundations and matching gifts*
- Corporations  
**\$55,308,537**  
*Includes corporate foundations and matching gifts*
- Other Organizations  
**\$53,487,213**
- Non-Alumni Parents  
**\$42,907,259**
- Friends  
**\$37,758,963**
- Holy Cross and Other Religious Organizations  
**\$163,674**

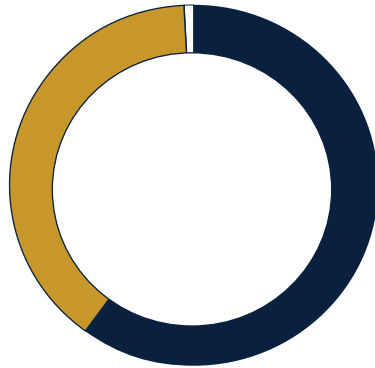


## CASH RECEIPTS BY GIFT TYPE

FISCAL YEAR 2019-20

**Total: \$466,186,920**

- Pledge Payments  
**\$280,424,015**  
*Cash gifts directed to existing commitments*
- Outright Gifts  
**\$182,652,811**  
*Cash gifts not connected to a pledge*
- Matching Gifts  
**\$3,110,094**  
*A corporate or foundation cash gift that matches an employee gift*

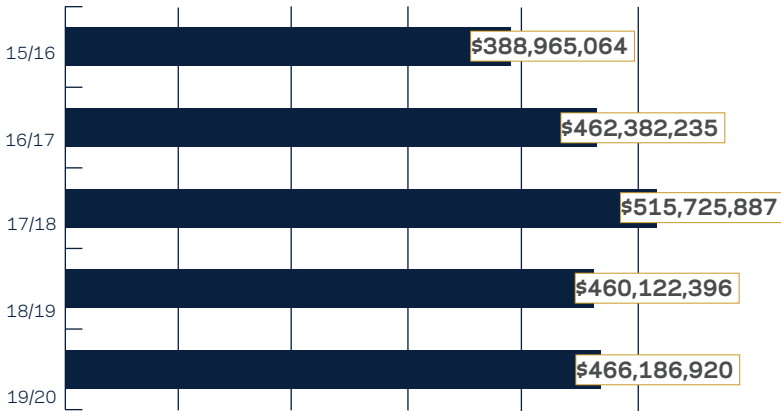




# FINANCIAL OVERVIEW

## CASH RECEIPTS BY FISCAL YEAR

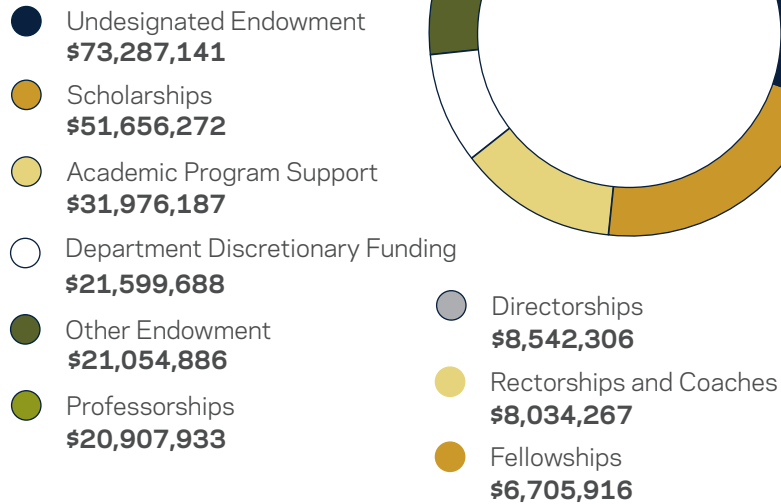
BY FISCAL YEAR



## ENDOWMENT GIFTS

FISCAL YEAR 2019-20

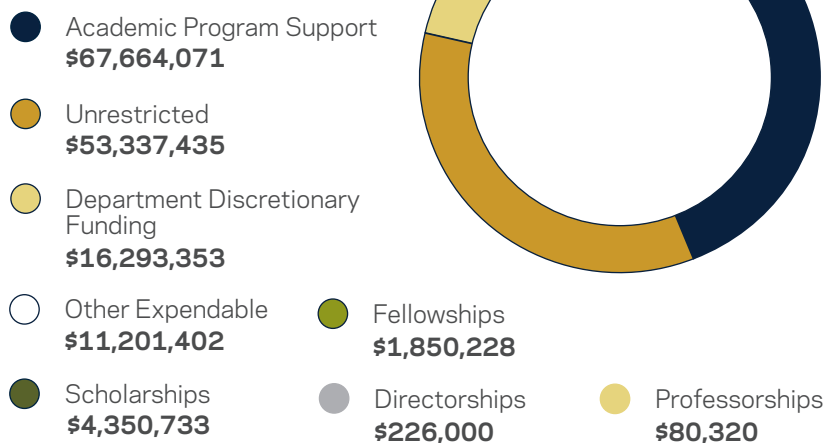
**Total: \$243,764,596**



## EXPENDABLE GIFTS

FISCAL YEAR 2019-20

**Total: \$155,003,542**



In fiscal year 2019-20 the cost of fundraising was 10 cents of each dollar raised.



"IN THE EARLY DAYS OF THE UNIVERSITY, OUR PREDECESSORS HAD TO CONTEND WITH GREAT CHALLENGES: A DEVASTATING FIRE, ECONOMIC UNCERTAINTY, AND EVEN A TYPHOID OUTBREAK THAT GRAVELY AFFECTED THE ENTIRE COMMUNITY.

IN EVERY INSTANCE, THE NOTRE DAME FAMILY SAW A CHANCE TO FIND HOPE AND INSPIRATION IN THE FAITH THAT FOUNDED THIS PLACE, AS WELL AS A REMINDER TO RELY ON GOD'S GUIDANCE AND THE PROMISE OF THE HOLY CROSS EDUCATIONAL MISSION.

THE DIFFICULTIES WE FACE TODAY ARE LIKEWISE AN OPPORTUNITY TO RESPOND WITH FAITH, HOPE, AND LOVE—AS WELL AS WITH THE COURAGE THAT COMES FROM KNOWING THAT WE ARE IN THIS FIGHT TOGETHER. THANK YOU FOR YOUR CONTINUED GENEROSITY IN SUPPORT OF ALL THAT WE DO HERE."

**-Rev. John I. Jenkins, C.S.C. -  
President**



UNIVERSITY OF  
**NOTRE DAME**

**Office of Stewardship & Donor Relations**  
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