



# UNIVERSITY OF NOTRE DAME

THE 2013-14 STEWARDSHIP REPORT





- 1 From the President
- 2 Scholarships & Fellowships
- 4 Professorships & Directorships
- 6 The Hesburgh Libraries
- 8 Endowments for Excellence
- 10 Annual Giving
- 12 Capital Projects
- 14 Gift Planning
- 16 Financial Overview

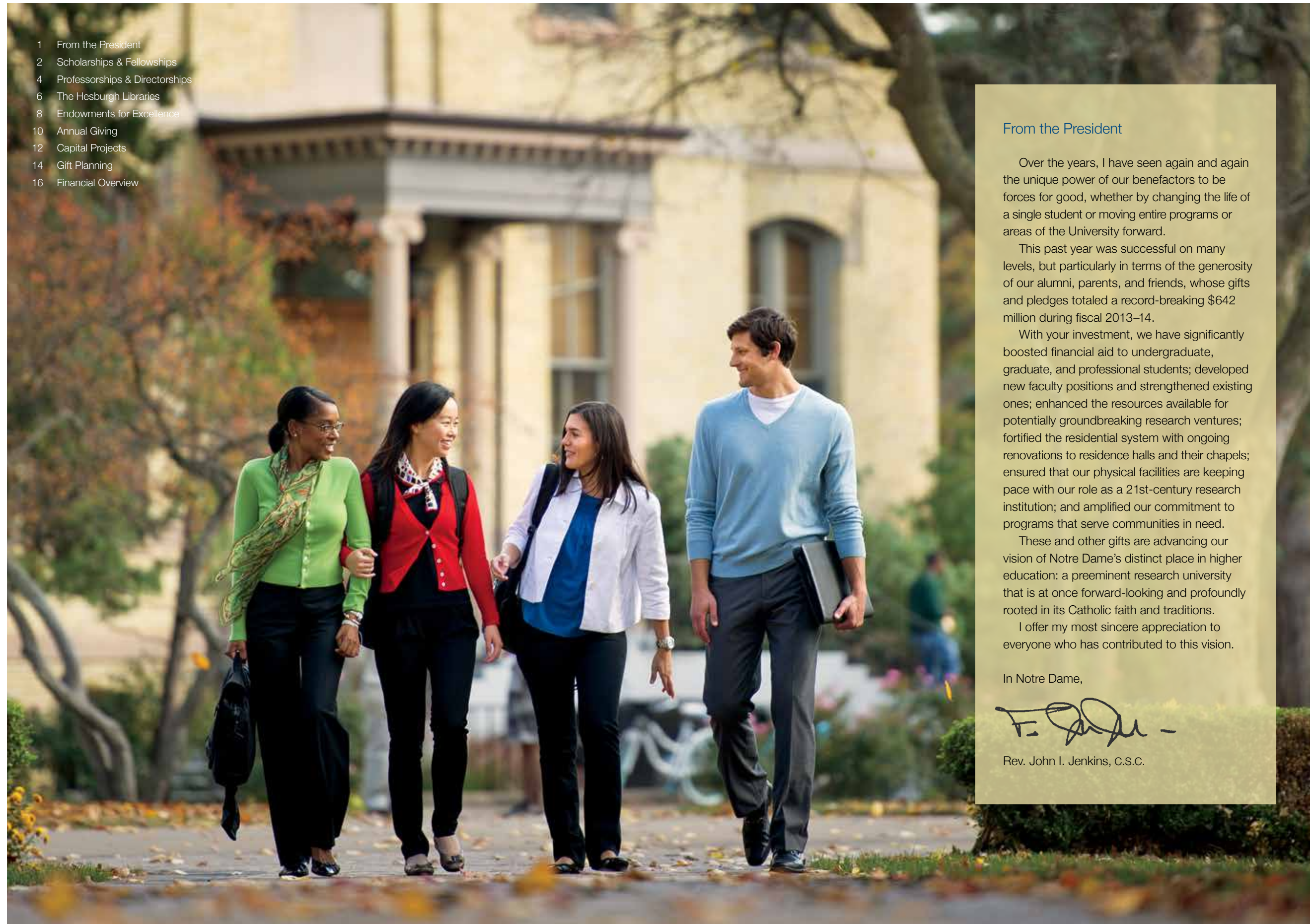
Your gifts matter. You matter.

That's why Notre Dame takes very seriously the Promise of Stewardship:

- Gifts will be acknowledged in a timely and personal manner.
- A gift accepted with a restricted purpose will be used for that purpose.
- Whenever feasible, and especially with gifts of endowment, annual reports will be shared with the benefactor.
- 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.
- Proper recognition will always be given to the benefactor; recognition of a public nature will first be approved by the benefactor.

**ON THE COVER:**

A statue of Rev. Edward Sorin, C.S.C., graces the center of campus. The University celebrated the bicentennial of its founder's birth on February 6, 2014.



### From the President

Over the years, I have seen again and again the unique power of our benefactors to be forces for good, whether by changing the life of a single student or moving entire programs or areas of the University forward.

This past year was successful on many levels, but particularly in terms of the generosity of our alumni, parents, and friends, whose gifts and pledges totaled a record-breaking \$642 million during fiscal 2013–14.

With your investment, we have significantly boosted financial aid to undergraduate, graduate, and professional students; developed new faculty positions and strengthened existing ones; enhanced the resources available for potentially groundbreaking research ventures; fortified the residential system with ongoing renovations to residence halls and their chapels; ensured that our physical facilities are keeping pace with our role as a 21st-century research institution; and amplified our commitment to programs that serve communities in need.

These and other gifts are advancing our vision of Notre Dame's distinct place in higher education: a preeminent research university that is at once forward-looking and profoundly rooted in its Catholic faith and traditions.

I offer my most sincere appreciation to everyone who has contributed to this vision.

In Notre Dame,

Rev. John I. Jenkins, C.S.C.





# SCHOLARSHIPS & FELLOWSHIPS

## Gifts to Undergraduate Scholarships

BY FISCAL YEAR / IN MILLIONS / EXPENDABLE AND ENDOWED

|       |         |
|-------|---------|
| 09/10 | \$36.38 |
| 10/11 | \$24.98 |
| 11/12 | \$24.38 |
| 12/13 | \$28.53 |
| 13/14 | \$28.00 |

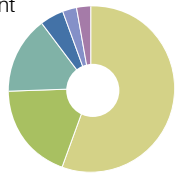


## Sources of Undergraduate Aid

FISCAL 2013-14

Total \$218,383,888

- University Scholarships \$121,867,039
- Loans \$40,946,977
- Grants \$33,506,900
- External Scholarships \$9,992,070
- ROTC \$6,423,618
- Campus Employment and Work-Study \$5,647,284



## The Melissa Cook Memorial Foundation Scholarship

The Melissa Cook Memorial Foundation Scholarship serves as a perpetual tribute to the late Melissa Cook and to her family's belief that from tragedy can spring hope for the future. Melissa, a 1994 Notre Dame alumna, died in 2002 when scaffolding from the John Hancock Center in Chicago fell onto her car. The scholarship, established by Melissa's mother and stepfather, Linda and Paul Demo, provides a full four years of tuition, room, and board to deserving students

who have demonstrated financial need.

A scholarship recipient herself—for softball—Melissa played third base, shortstop, and catcher for the Lady Irish, while earning a degree in accountancy. Her educational experience and the friendships she forged on the field and in her classrooms, dormitory, and larger campus community had a major influence in shaping the young woman Melissa would become.

In 2016, the first Cook Memorial Scholars will, like Melissa before them, graduate from the University of Notre Dame. The scholarship's current recipients

are John Gore and Eric Zidarich.

In addition to the scholarship, the Demos previously donated funds for the Melissa Cook Softball Stadium, which was dedicated in 2008.

**ABOVE:** The late Melissa Cook with her stepfather, Paul Demo, on the day of her 1994 graduation from Notre Dame.

**BELOW:** Cook Memorial Scholarship recipients John Gore (left) and Eric Zidarich.

## Gifts to Graduate Fellowships

BY FISCAL YEAR / IN MILLIONS / EXPENDABLE AND ENDOWED, INCLUDES MBA AND LAW

|       |         |
|-------|---------|
| 09/10 | \$13.41 |
| 10/11 | \$15.42 |
| 11/12 | \$12.75 |
| 12/13 | \$7.82  |
| 13/14 | \$4.98  |

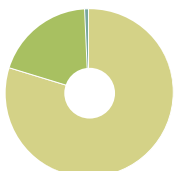


## Sources of Graduate Aid

FISCAL 2013-14

Total \$168,772,434

- Fellowships and Grants \$134,648,903
- Loans \$33,772,490
- Work-Study \$351,041



Financial aid benefactors understand keenly just how extensive the impact of such gifts can be, both for the student recipient and for the University. The nearly \$33 million contributed to scholarships and fellowships this year will go a long way toward reducing barriers to education for low- and middle-income students, decreasing student debt levels, and addressing the increased demand for aid—all the while attracting a diverse mix of high-achieving undergraduate and graduate students.













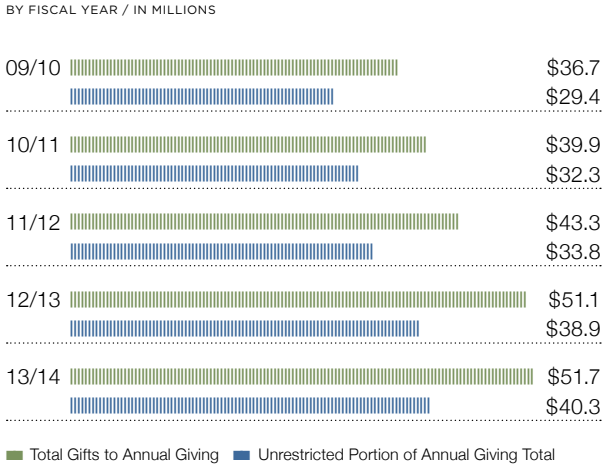




# ANNUAL GIVING



### Annual Giving Impact



### Inaugural Notre Dame Day Draws a Global Audience

A new tradition was launched this year, as the Notre Dame family connected in an entirely new way. Notre Dame Day, billed as a “global celebration” of Our Lady’s University, kicked off at 18:42 local time (6:42 p.m.) on April 27, 2014. The date honored that same day in 1879, when Father Sorin inspired the University to rebuild after a massive fire destroyed the original Main Building.

By way of streaming broadcast, social media, on-campus events, and participation from around the world, the Notre Dame

community shared stories and generously made gifts to their beloved University. The event drew more than 20,000 broadcast viewers from 83 countries, resulting in 18,000+ social media posts about #NDday and 4,049 donations totaling \$915,516.

The 29-hour broadcast, streamed live from LaFortune Student Center, featured interviews with and performances by Notre Dame celebrities, faculty, staff, and students. From the Bookstore Basketball courts to the top floor of the Hesburgh Library, roving reporters gave viewers real-time updates from campus. Members of the Notre Dame family were invited to watch, connect, give, and vote using online and mobile devices.

Notre Dame Day offered academic departments, institutes, and centers, as well as individual residence halls, athletic teams, and other programs, the opportunity to compete for “Challenge Funds” based on global donor participation and online viewing. Notre Dame students showed up in full force, competing against rival residence halls in trivia, tug-of-war, and the rallying of votes through social media.

“ProudtobeND” channels on Facebook, Twitter, and nd.edu continue the celebration of all things Notre Dame. The next Notre Dame Day is slated for April 27, 2015.



Annual Giving at Notre Dame represents the largest contingent of benefactors to the University, with gifts ranging from \$5 to \$100,000. These generous alumni, parents, and friends, who share a love for Notre Dame and a desire to make a difference, help to fund critical priorities throughout the University. In fiscal 2013–14, University donors contributed more than \$51 million to Annual Giving through the Notre Dame Fund and recognition societies.



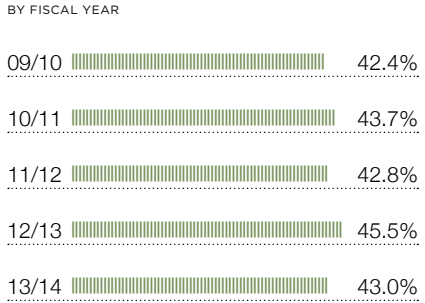
### Annual Giving Designations

FISCAL 2013-14  
Total \$51,706,442

- Sorin Society \$22,331,179
- President’s Circle \$12,063,070
- Restricted Annual Giving \$11,363,769
- Notre Dame Fund \$5,948,424



### Undergraduate Alumni Participation Rate







# CAPITAL PROJECTS



## Gifts to Capital Projects

BY FISCAL YEAR / IN MILLIONS

|       |  |          |
|-------|--|----------|
| 09/10 | ████████████████████                         | \$32.27  |
| 10/11 | ████████████████████████████                 | \$45.21  |
| 11/12 | ████████████████████████                     | \$33.83  |
| 12/13 | ████████████████████████████                 | \$36.67  |
| 13/14 | ██ | \$101.17 |

### A Revitalized Morris Inn

On September 1, 2013, the Morris Inn, a campus institution that has long served as the University's living room, reopened its doors after an extensive renovation. Originally built in 1952 with gifts from Ernest and Ella Morris, the facility quickly rose to prominence as *the* place for alumni, distinguished guests, and friends to experience the hospitality of the Notre Dame family firsthand.

Committed to keeping that tradition of service alive, Ernestine Raclin, the Morrises' daughter, together with her family and the Carmichael Foundation,

provided the lead gift for the renovation. "Our family has a long and deep emotional bond with Notre Dame and the Morris Inn," says Raclin. "We were very pleased to have an opportunity to ensure that the Inn continues to play a prominent role in the life of the University."

While the Inn's newly adopted Gothic-style architecture—reflecting the dominant campus style—and 65,500-square-foot expansion make for an arresting first impression, the interior, too, is rife with striking enhancements. The reimaged space now includes the pub Rohr's, a gift of Jim and Sharon Rohr; the Thomas H. Quinn Family Room; and the new William

and Mary Ann Smith Ballroom. The historic Sorin's restaurant, renewed through the benefaction of Alex and Kitchie McMurtrie, is now beautifully complemented by the Wind Family Fireside Terrace, an adjacent outdoor space donated by Larry and Cindy Wind.

The result is a welcoming and elegant living room, one poised to host and entertain Notre Dame family and friends for generations to come.

**ABOVE:** The Wind Family Fireside Terrace.



The need to create physical spaces that can support a university of this caliber continues to give rise to the thoughtful expansion and improvement of campus facilities. Capital donors this year gave a remarkable \$101 million, much of it earmarked for the new Campus Crossroads Project and the Morris Inn renovation, among several other exciting construction projects.

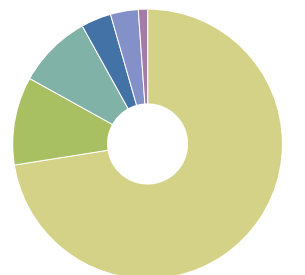


## Sources of Capital Support

FISCAL 2013-14

Total \$101,169,850

- Alumni \$73,452,539
- Parents \$10,796,465
- Foundations \$8,894,237
- Corporations \$3,597,934
- Friends \$3,372,787
- Organizations \$1,055,888

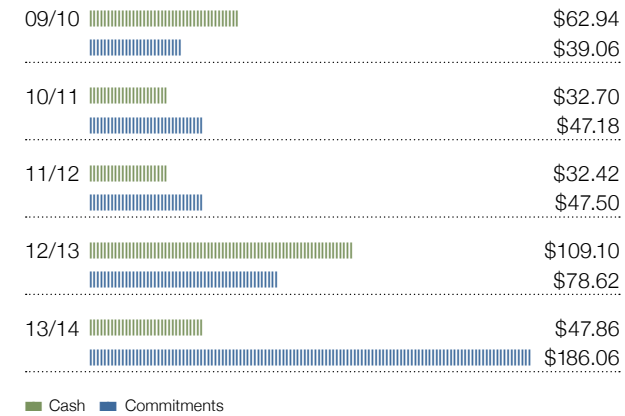






## Gift Planning Support

BY FISCAL YEAR / IN MILLIONS



### The Jim and Barbara Slack Charitable Remainder Trust

As loyal Domers, Jim and Barbara Slack have been avid supporters of unrestricted funds at the University since Jim graduated in 1974. Recently, the couple redoubled their commitment to Notre Dame, establishing a charitable remainder trust that would permit them to give back in a significant way after their deaths while also providing several attractive benefits in the present: a lifetime income stream, an immediate income tax deduction, and the opportunity to invest with the Notre Dame Endowment.

The next step was determining how to designate the remainder of the trust after their passing. That question was soon answered, however, when Jim recalled an article he had read in *Notre Dame Magazine* about Neimann-Pick Type C (NPC), a rare genetic disorder that primarily affects children and results in early death.

The article detailed the efforts of Notre Dame researchers and the Ara Parseghian Medical Research Foundation in finding a treatment. Moved by the plight of families shattered by NPC—and knowing that research on NPC and other rare disorders is often severely

underfunded—the couple designated their trust for the Center for Rare and Neglected Diseases. Jim and Barbara's hope is that, with their gift and others, the center can advance its mission of developing drugs, vaccines, and treatments that can offer real and lasting hope to individuals and families suffering from a host of devastating illnesses.

"That's a legacy we can be proud of," says Jim.

ABOVE: Jim and Barbara Slack.

# GIFT PLANNING

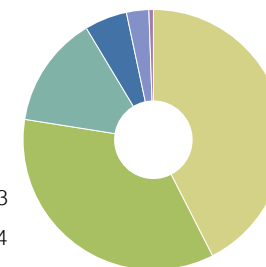


Benefactors again responded with enthusiasm and generosity to the *Love Thee Notre Dame* gift planning initiative. For the second year in a row, a new record was set, with more than \$186 million committed, including large increases in bequests and trusts. Giving to donor advised funds, IRA charitable rollovers, and charitable gift annuities more than doubled over the previous year.

### Gift Planning Cash Totals

FISCAL 2013-14

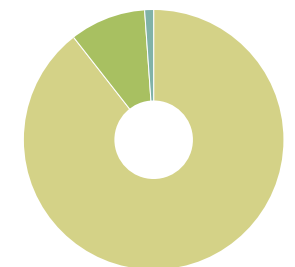
Total \$47,859,309



### Gift Planning Total Commitments

FISCAL 2013-14

Total \$186,063,530





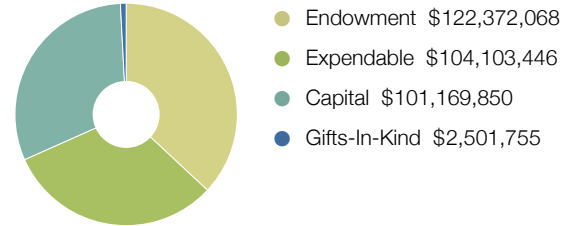
The University wishes to extend a most sincere thank you to all the individuals and organizations whose generosity made fiscal 2013–14 a year without precedent in Notre Dame fundraising. New gifts and commitments totaled \$642 million, surpassing last year's record by more than \$250 million—a feat that seemed all but unimaginable until a few months ago.

Cash receipts finished at roughly \$330 million, more than \$40 million above the record set in fiscal 2007–08. The excitement generated by the first-ever Notre Dame Day helped to push unrestricted giving above \$50 million. Likewise, Corporate and Foundation Giving exceeded expectations this year, generating \$23 million and \$49 million, respectively.

# FINANCIAL OVERVIEW

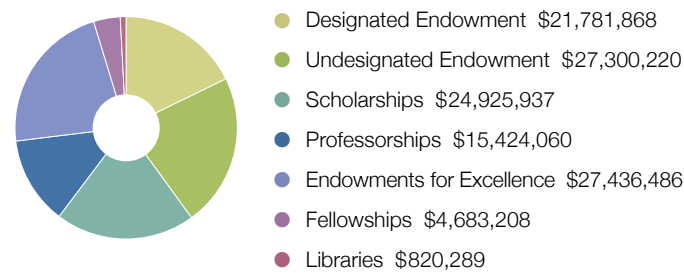
## Gift Distribution \$330,147,119

FISCAL 2013-14



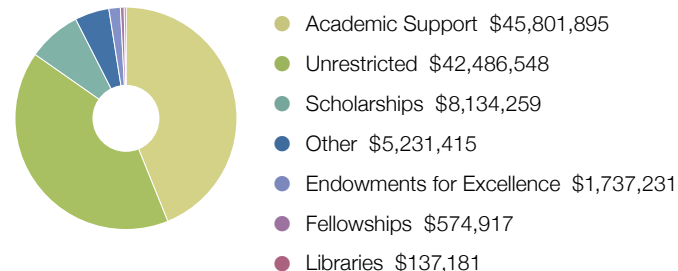
## Endowment Gifts \$122,372,068

FISCAL 2013-14



## Expendable Gifts \$104,103,446

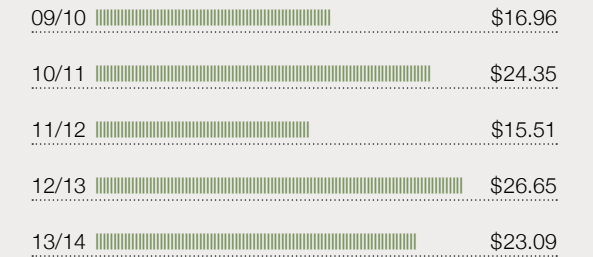
FISCAL 2013-14



## Corporate, Foundation, and Matching Gifts

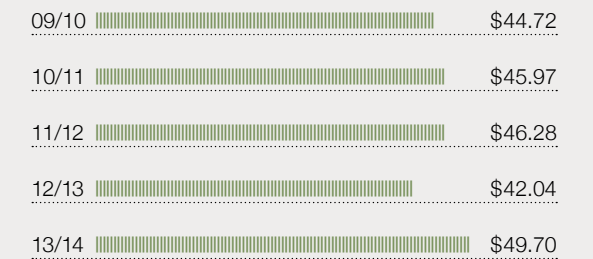
### Corporate Support

BY FISCAL YEAR / IN MILLIONS



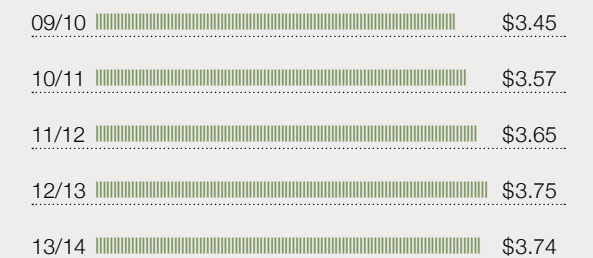
### Foundation Support

BY FISCAL YEAR / IN MILLIONS  
INCLUDES GIFTS-IN-KIND



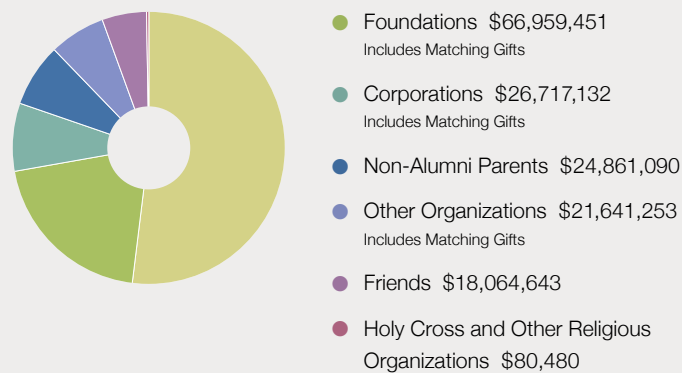
### Matching Gift Totals

BY FISCAL YEAR / IN MILLIONS



## Sources of Cash Receipts \$330,147,119

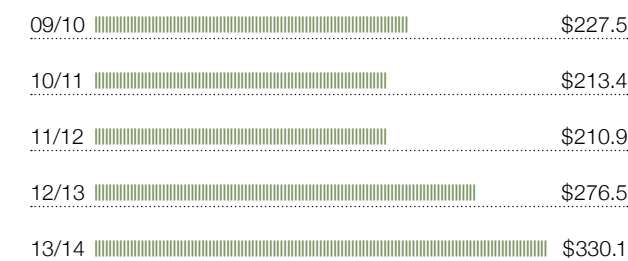
FISCAL 2013-14



In fiscal 2013–14, the cost of fundraising was 11 cents of each dollar raised.

## Gift Income by Fiscal Year

IN MILLIONS



## Gift Income by Gift Type \$330,147,119

FISCAL 2013-14





