



Annual Report on  
University Private Support  
**2004-05**

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# UNIVERSITY OF CALIFORNIA

**Annual Report on  
University Private Support  
2004-05**

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**Office of the President  
University Affairs**

### Reporting Conventions Used in this Report

The Annual Report on University Private Support includes data for each campus and the University using two of three gift reporting conventions employed by the University. The first reporting convention, which is *cash*-based, is used for comparisons with other institutions. It is also employed for the Council on Aid to Education's (CAE) national Voluntary Support of Education Survey completed by colleges and universities. This reporting convention includes outright gifts and pledge payments, but does not include new pledges. This method of gift reporting is thought to present the best perspective on the cash flow that derives from private support and is used for the body of this report.

The second method is a variation of the *accrual* system and includes new, legally-binding pledges up to five years in duration, plus outright gifts. In this system, payments made on pledges are not included. The method is thought to present the best perspective on the level of current fundraising activity and is the reporting standard used for reports on capital campaigns. These first two reporting standards are shown at the bottom of each campus narrative.

The breakdown follows for 2004-05 support:

REPORTING CONVENTIONS	00-01	01-02	02-03	03-04	04-05	04-05 TOTALS	
CASH (CAE)	Pledge Payments	\$284,510,669	\$236,605,595	\$267,642,375	\$274,717,901	\$262,203,464	\$1,196,878,308
	New Outright Gifts	\$715,596,169	\$749,854,424	\$749,854,424	\$763,427,803	\$934,674,844	
ACCRUAL (REGENTS)	New Pledges	\$439,456,493	\$551,322,781	\$195,665,861	\$359,427,785	\$387,110,784	\$1,321,785,628

There is a third reporting convention that is employed by the University's accounting office for its end-of-year audited financial reports. This method is also based on accrual; however, on the revenue side, unconditional, legally-binding pledges are recorded at the time they are promised, balanced by receivable accounts which are reduced as pledge payments are received. This method is used in the annual UC Financial Report.

The Annual Report on University Private Support 2004-05 can be viewed online at:  
[www.ucop.edu/ua/instdv/annual/2005.pdf](http://www.ucop.edu/ua/instdv/annual/2005.pdf)

*This report is a compilation of private support data, campus narratives, and foundation rosters prepared by each campus. The method of rounding may produce the appearance of minor inconsistencies in various totals and percentages, but the differences do not affect the accuracy of the data.*

# PRIVATE SUPPORT

## Overview

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### Annual Report on University Private Support 2004-2005

The University of California received a record \$1.197 billion in new gifts and pledge payments from alumni and friends, foundations and corporations during 2004-05, which marked the fifth consecutive year that private support to UC has topped \$1 billion. This year's total is up \$162.4 million (15.8 percent) from the previous year. The previous record was set in 2002-03 when the University collected \$1.115 billion from donors.

Of the record \$1.197 billion in 2004-05, foundations donated the largest amount, \$462.7 million, or 38.7 percent of the total, representing a 29.4 percent increase from the previous year. They were followed by non-alumni individuals who contributed \$248.9 million, or 20.8 percent of the total (and an 8.5 percent increase from the previous year), and corporations, \$247.6 million, 20.7 percent of the total (and a 12 percent increase from the previous year).

UC alumni in 2004-05 contributed \$132.5 million, or 11 percent of the total (and a 13 percent increase from the previous year). Campus-related organizations collected \$9.9 million in 2004-05, representing 0.83 percent of the total, although the increase from the 2003-04 was 20.3 percent.

Donors gave \$358.3 million to research and \$355.6 million to campus departmental support – each about 30 percent of the annual total – in 2004-05. Contributions to research in 2004-05 represented a 30 percent increase from the previous year. Campus improvement also received strong support from donors in 2004-05, receiving \$243.2 million, or 20.3 percent of the total (and a 24 percent increase from the previous year). Donations for student support recorded the largest percentage increase from year-to-year, totaling \$118.5 million (9.9 percent of the total), a jump of 43.6 percent from 2003-04.

In terms of the types of donations, cash represented the overwhelming leader at \$974.0 million of the total in 2004-05, representing 81.4 percent of the \$1.197 billion collected. It was a 23.6 percent increase from the previous year. Donations of real property showed the most dramatic increase from year-to-year, climbing to \$101.5 million in 2004-05 from \$35.4 million the previous year, an increase of nearly 187 percent.

The University is grateful to its alumni and friends for the unprecedented support. Gifts and grants continue to provide an important component of the University's budget each year. The growth in private philanthropy is essential to maintain quality in the face of declining state support.

The results underscore the continued confidence among donors in the quality of the University of California's programs and the importance of its core mission. Moreover, it reflects the hard work of the professional fundraising staff and the countless volunteers who assist in the University's fundraising efforts, especially the campus foundations, the leaders of which are listed in this report.

# PRIVATE SUPPORT

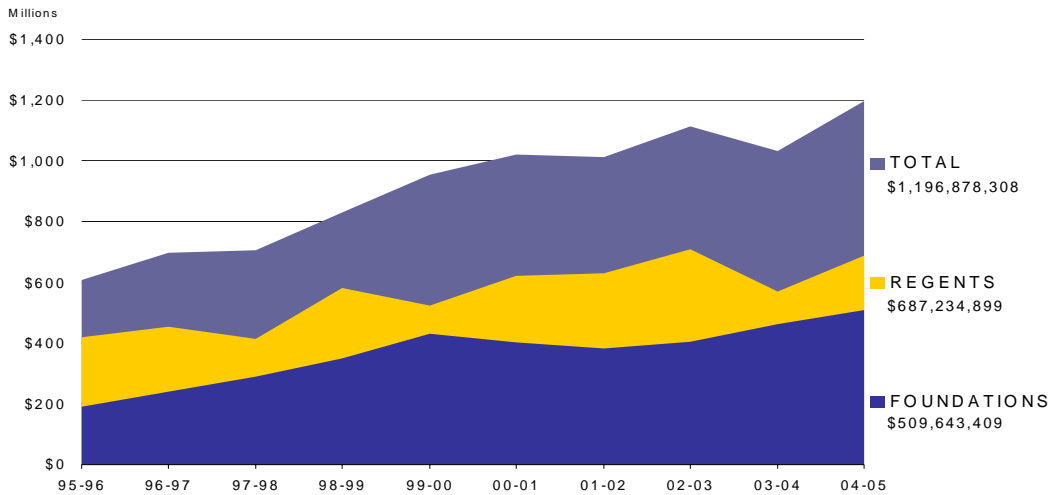
## System Summary

### Private Support to Regents and Foundations by Cash Reporting Convention

CAMPUS	REGENTS	FOUNDATIONS	TOTAL
Berkeley	\$132,647,534	\$90,026,054	\$222,673,588
Davis	52,855,601	47,341,313	100,196,914 *
Irvine	24,383,198	30,682,570	55,065,768 *
Los Angeles	140,422,261	141,130,211	281,552,473 *
Merced	3,330,652	1,770,679	5,101,331
Riverside	14,695,527	4,787,221	19,482,748
San Diego	56,857,995	83,300,096	140,158,091 *
San Francisco	202,885,156	90,047,225	292,932,381 *
Santa Barbara	34,644,655	14,340,744	48,985,399
Santa Cruz	18,837,949	6,217,296	25,055,245
Universitywide	5,674,371	0	5,674,371
<b>TOTAL</b>	<b>\$687,234,899</b>	<b>\$509,643,409</b>	<b>\$1,196,878,308</b>

Source: University of California Office of the President

\*These figures include support for Medical Centers, Schools of Medicine, as well as other health sciences degree-granting programs. Data on these campuses and private support for all University health science programs are found on the facing page.



REPORTING CONVENTIONS	00-01	01-02	02-03	03-04	04-05	04-05 TOTALS
<b>CASH (CAE)</b>	<b>Pledge Payments</b>					
	\$284,510,669	\$236,605,595	\$267,642,375	\$274,717,901	\$262,203,464	\$1,196,878,308
	<b>New Outright Gifts</b>					
	\$715,596,169	\$749,854,424	\$749,854,424	\$763,427,803	\$934,674,844	\$1,321,785,628
<b>ACCRUAL (REGENTS)</b>	<b>New Pledges</b>					
	\$439,456,493	\$551,322,781	\$195,665,861	\$359,427,785	\$387,110,784	

# PRIVATE SUPPORT

## Gifts by Area

### Distribution by Discipline: \$1,196,878,308

	Total	Percentage
Agriculture and Natural Resources	\$53,613,492	4.48%
Arts, Letters and Sciences	162,191,206	13.55%
Athletics/Sports	37,514,550	3.13%
Business/Management	23,553,524	1.97%
Engineering	83,372,518	6.97%
Financial Aid	24,079,460	2.01%
Health Sciences and Medicine	569,600,720	47.59%
Law	12,293,187	1.03%
Libraries	19,330,872	1.62%
Miscellaneous	108,014,736	9.02%
Other*	42,997,097	3.59%
Other Professionals Schools	45,516,784	3.80%
Veterinary Medicine	14,800,162	1.24%
<b>Total</b>	<b>\$1,196,878,308</b>	<b>100.00%</b>

\* Chancellor and annual funds, alumni associations, energy laboratories, museums, public programs, etc.

### Gifts for Health Sciences and Medicine: \$569,600,720

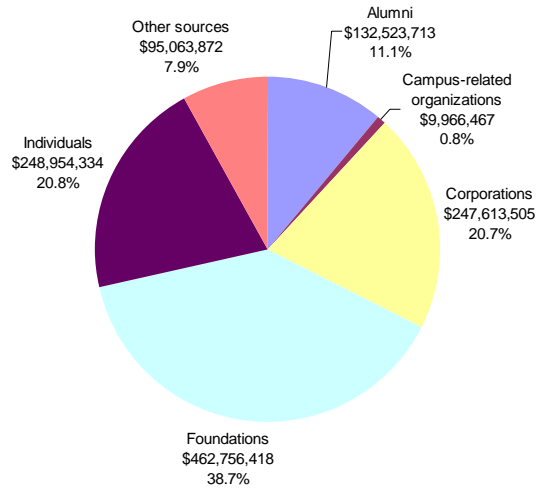
	Total	Percentage
<i>Campus</i>		
Berkeley	\$8,260,740	1.45%
Davis	27,638,339	4.85%
Irvine	20,271,802	3.56%
Los Angeles	158,581,276	27.84%
Riverside	611,903	0.11%
San Diego	61,304,280	10.76%
San Francisco	292,932,381	51.43%
<b>Total</b>	<b>\$569,600,720</b>	<b>100.00%</b>
<i>Area</i>		
Biological Sciences	\$5,305,605	0.93%
Biomedical Sciences	929,038	0.16%
Dentistry	27,490,376	4.83%
Medical Centers	6,923,408	1.22%
Medicine	336,455,060	59.07%
Nursing	23,033,761	4.04%
Optometry	335,606	0.06%
Other*	142,074,825	24.94%
Pharmacy	12,824,266	2.25%
Public Health	14,228,775	2.50%
<b>Total</b>	<b>\$569,600,720</b>	<b>100.00%</b>

\* Chancellors' funds, Beckman Laser Institute, Graduate Division for Health Sciences, special cancer and neuroscience programs, etc.

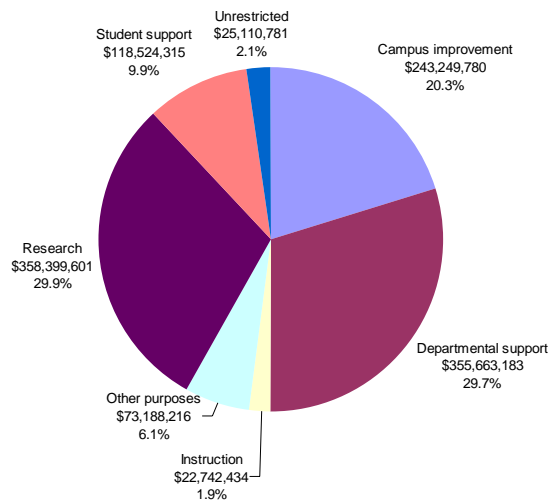
# PRIVATE SUPPORT

## Source, Purpose and Asset: \$1.197 billion

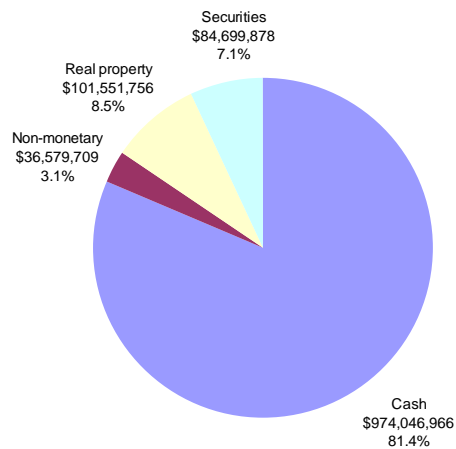
### Gift Source



### Gift Purpose



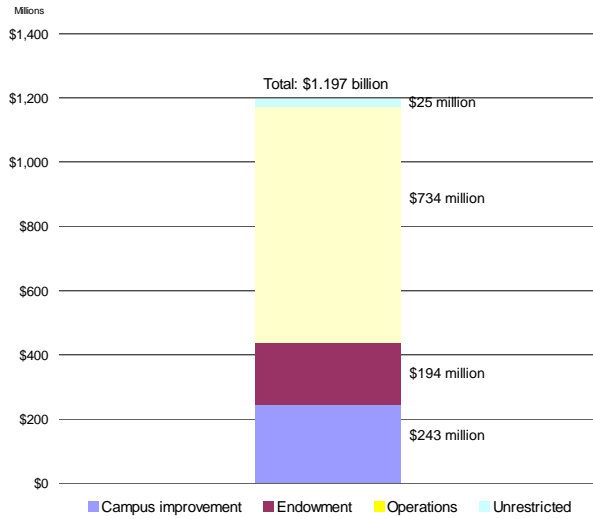
### Gift Type



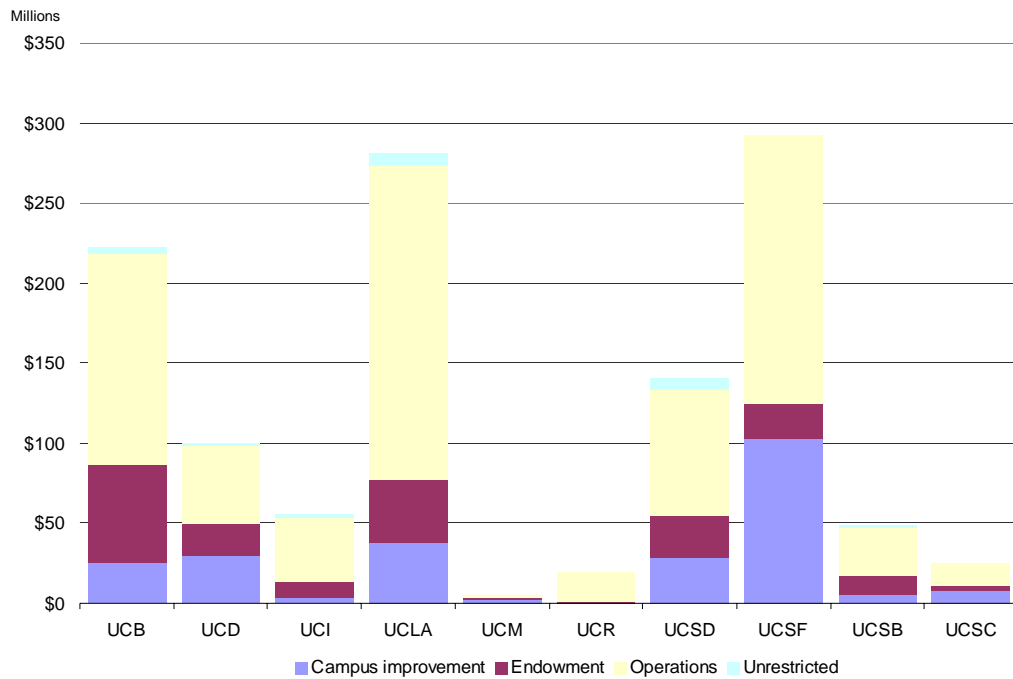
# PRIVATE SUPPORT

## Donor Restrictions on Use

New Gifts for Endowment, Campus Improvement, Operations, and Unrestricted Purposes



The University received \$734 million in private gifts, grants and pledge payments for current use to support University operations. An additional \$243 million supported campus improvement, including capital projects, and \$194 million for new and existing endowments. Just \$25 million (2.1 percent) of the total \$1.197 billion in support was unrestricted by the donors.



# PRIVATE SUPPORT

## Alumni Giving

Giving from alumni is increasingly important to UC. As alumni populations grow and age, they traditionally provide a large percentage of the University's private support. UC alumni contributed \$132.5 million in outright gifts and pledge payments in 2004-05. This generosity is a measure of the appreciation these individuals have for their educational experience at UC, as demonstrated by a few of the alumni gifts from around the system:

**Ann Jennett, UCLA '54** established an endowment fund in the name of her late husband, John Jennett '52. John attended UCLA on a Navy ROTC scholarship and after graduation became a Navy pilot. He passed away in August 2000. The John Wolfe Jennett Endowment at the UCLA Alumni Association immortalizes John's name and spirit, while providing student support in the years to come.

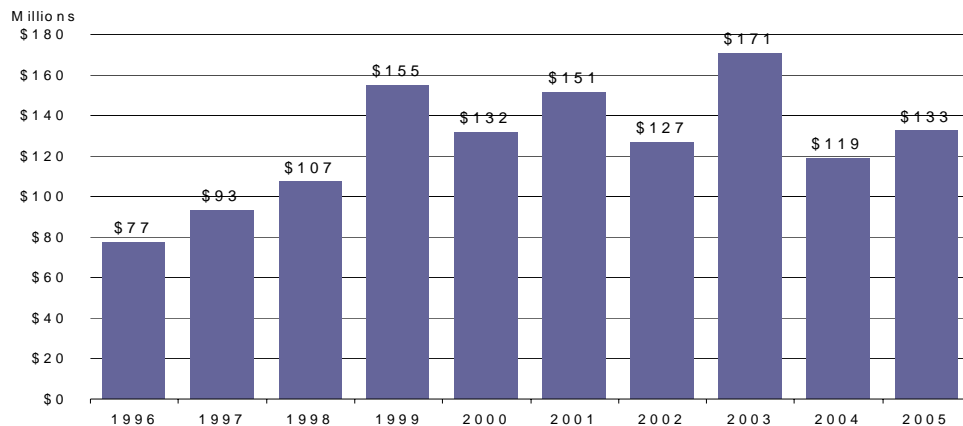
**Mike Child UCD '76** and his wife, Renee, have announced their intention to endow two professorships in the College of Engineering. Mike is a member of The Regents Investment Advisory Committee and served as a volunteer on the UC Davis foundation board, as well as the dean's executive committee for the College of Engineering.

A former member of the UCR Alumni Association board and his wife created a scholarship program to support students at UCR who are struggling to complete their graduate studies while raising a family. Although the donors wish to remain anonymous, they have asked that the scholarship program be named in honor of **Ronald Neumann UCR '66 B.A., '67 M.A.** Mr. Neumann is the U.S. ambassador to Afghanistan. He and his family lived in family student housing while he was completing his master's degree.

**Harold Schoen**, a 1924 graduate of the institution that became UC Santa Barbara, and his wife, Hester, have left most of their \$2 million estate to UCSB. Their estate was designated to support graduate fellowships, an endowment for arts and lectures and Library Special Collections, and a substantial matching gift for construction of the College of Creative Studies.

**Joe Lima UCSD '87**, the son of Cuban immigrants, wanted to help an immigrant or a child of an immigrant so he established the campus's first Alumni Leadership Scholarship. With a commitment of \$30,000—just \$6,000 annually for five years—Joe will be able to make an immediate impact by directing \$1,000 of the gift each year toward current scholarship support. The remaining \$5,000 will be directed each year toward the Joseph H. Lima Endowed Scholarship fund. His employer, Hotwire.com, agreed to match the endowment portion of his pledge, and the Lima endowment will be valued in excess of \$50,000 at the end of the five-year pledge. Additionally, Lima's annual \$1,000 gift will be matched by the Alumni Association Leadership Scholarship program.

### Alumni Giving



# PRIVATE SUPPORT

## Division of Agriculture and Natural Resources (ANR)

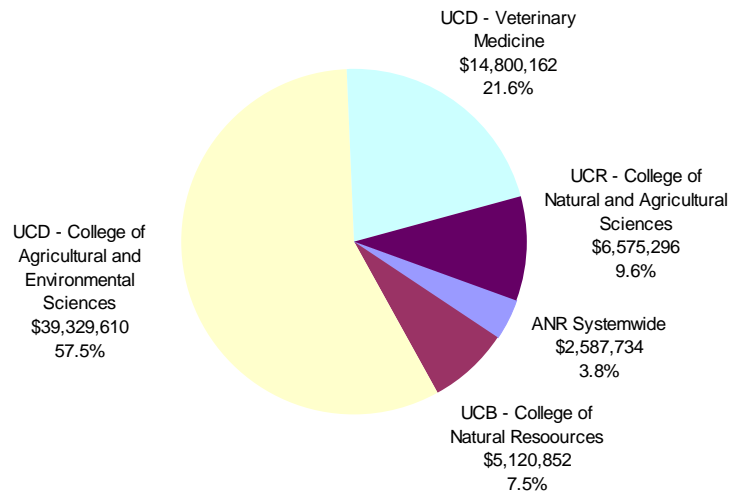
The Division of Agriculture and Natural Resources (ANR) is a statewide network of University of California researchers and educators dedicated to creating, developing and applying knowledge and practical information in agricultural, natural and human resources. ANR comprises the Agricultural Experiment Station, Cooperative Extension and more than 15 statewide programs. Our campus-based and county-based units bring the University of California to every community in the state.

The Agricultural Experiment Station supports UC scientists who generate new ideas, technologies and creative innovations that California agriculture and other businesses rely on to compete globally. Consumers, communities and the environment benefit from UC research on food safety, nutrition, natural resources, sustainable practices, biotechnology, youth development and other timely issues.

UC Cooperative Extension advisors work and live in local communities, bringing research innovations and practical solutions from UC to address real-world problems facing Californians. Our specialists and advisors can be found working with farmers to solve pest problems, reduce chemical use and increase productivity. We work with landowners and regulators to improve water quality and protect California's natural resources. We work with youth, low-income families and consumers to educate tomorrow's leaders, teach better eating habits and ensure a food supply that is healthful, nutritious and affordable.

Private support for programs in agriculture and natural resources totaled \$68,413,654 in 2004-05, representing a 102% increase from the previous year. This included \$24,381,510 designated specifically for research. Private gifts from individuals, corporations and foundations also provided support for instruction, student aid and fellowships, campus improvement and capital projects, UC Cooperative Extension activities and youth development programs.

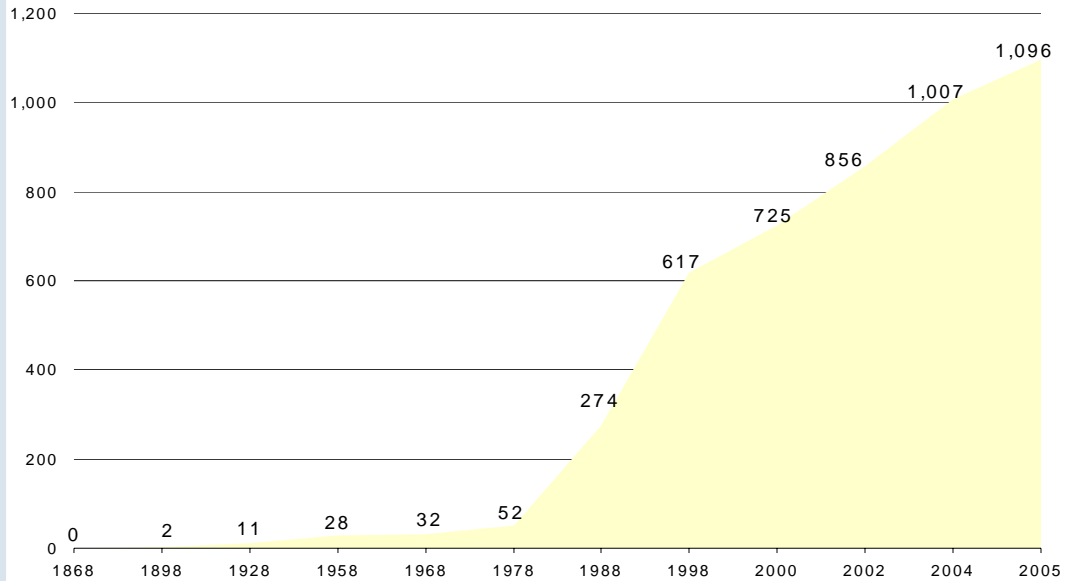
Total Giving to ANR: \$68,413,654



# PRIVATE SUPPORT

## Endowed Chairs

### Endowed Chairs



Endowed chairs and professorships play a vital role in the recruitment and retention of outstanding university faculty. The first chair, the Agassiz Professorship in Oriental Languages, was established with prescience by a generous 1872 gift from then-Regent Edward Tompkins. Since then, more than 1,000 chairs have been established by alumni and friends.

Donors continue to raise the standard. In 2004-05, endowments were established to support an additional 89 endowed chairs and professorships distributed across the campuses. These chairs vary widely by discipline. Overall, approximately one-third of all chairs reside in the health sciences, primarily in the schools of medicine. Regardless of the discipline, chairs provide essential support for teaching and research for faculty located throughout the system. The total market value of all chairs as of June 30, 2005, is \$1.193 billion.

The list of chairs on each campus can be viewed at [www.ucop.edu/ua/instdv/endowedchairs.html](http://www.ucop.edu/ua/instdv/endowedchairs.html)

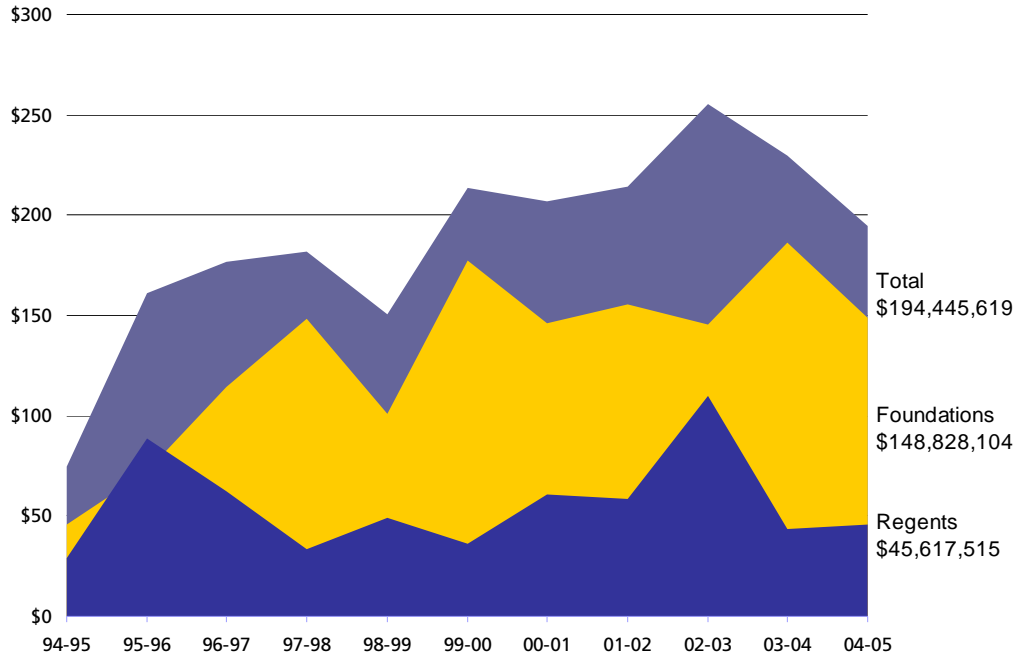
### Distribution By Discipline

	<u>Number of Chairs</u>
Agriculture	34
Engineering	132
Humanities	81
Life and Biological Sciences	63
Physical Sciences	52
Social Sciences	114
Professional Schools	180
Health Sciences	353
Veterinary Medicine	2
Miscellaneous and Multi-disciplinary	85
<b>Total</b>	<b>1,096</b>

# PRIVATE SUPPORT

## Additions To Endowment

Additions to Endowment: \$194 million

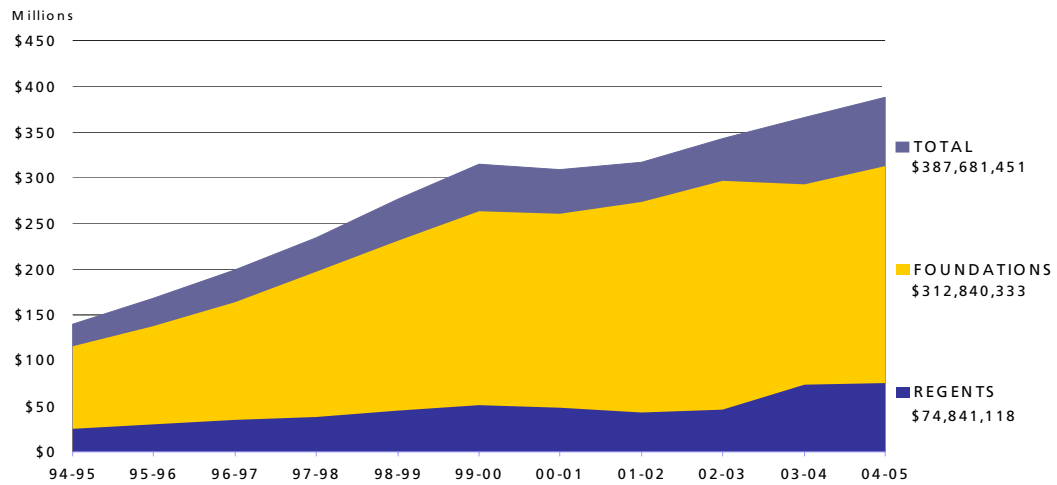


Year	Regents		Foundations		Total
94-95	\$28,949,540	38.7%	\$45,799,736	61.3%	\$74,749,276
95-96	88,772,584	55.1%	72,260,031	44.9%	161,032,615
96-97	62,213,632	35.2%	114,479,717	64.8%	176,693,349
97-98	33,229,661	18.3%	148,286,625	81.7%	181,516,286
98-99	49,304,263	32.8%	100,991,901	67.2%	150,296,164
99-00	36,413,766	17.0%	177,178,480	83.0%	213,592,246
00-01	60,908,962	29.5%	145,823,645	70.5%	206,732,607
01-02	58,718,178	27.4%	155,557,203	72.6%	214,275,381
02-03	109,630,734	42.9%	145,688,180	57.1%	255,318,914
03-04	43,772,747	19.1%	185,982,998	80.9%	229,755,745
04-05	45,617,515	23.5%	148,828,104	76.5%	194,445,619

The fair market value of all endowments (Regents and Foundations) was almost \$7.3 billion on June 30, 2005.

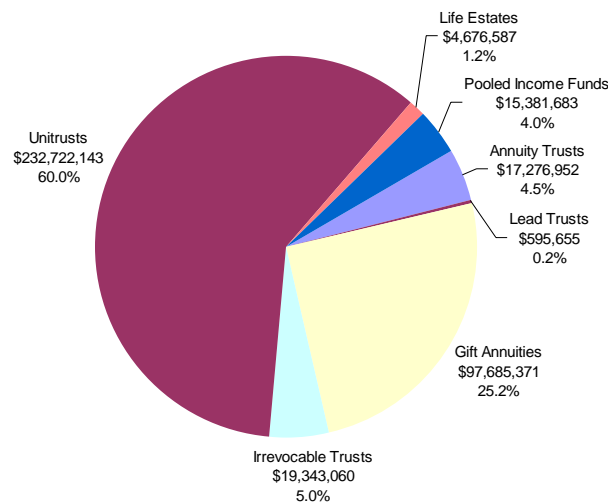
# PRIVATE SUPPORT

## Planned Giving Assets Under Management



Planned giving assets include irrevocable charitable remainder trusts, pooled income funds, gift annuities, and similar arrangements where the University or campus foundation is the trustee. The principal is distributed to the University for the charitable purpose specified by the donors on the death of the income beneficiaries or at the expiration of a term of years.

Total Planned Giving Assets: \$387,681,451



# PRIVATE SUPPORT

## Fundraising Campaigns

NAME OF CAMPAIGN	GOAL	DURATION	GIFTS/PLEDGES BY 6/30/05
<b>BERKELEY</b>			
No campaign at this time			
<b>DAVIS</b>			
No campaign at this time			
<b>IRVINE</b>			
UCI Medical Center Campaign	50,000,000	2002-2008	18,171,301
<b>LOS ANGELES</b>			
Campaign UCLA	2,400,000,000	1995-2005	2,852,065,447
<b>MERCED</b>			
Gallo School of Management Endowment	10,000,000	2002-2005	9,403,600
Endowed Chair Campaign	5,000,000	2002-2006	5,000,000
Gymnasium Expansion Campaign	1,360,000	2004-2006	1,006,000
<b>TOTAL</b>	<b>16,360,000</b>		<b>15,409,600</b>
<b>RIVERSIDE</b>			
Evolutions: The 50th Anniversary Campaign	50,000,000	2003-2005	50,920,972
<b>SAN DIEGO</b>			
The Campaign for UCSD - Imagine What's Next	1,000,000,000	2000-2007	754,135,910
<b>SAN FRANCISCO</b>			
The Campaign for UCSF	1,400,000,000	1999-2005	1,665,141,407
<b>SANTA BARBARA</b>			
The Campaign for UC Santa Barbara	500,000,000	2000-2009	295,766,801
<b>SANTA CRUZ</b>			
Cornerstone Campaign	50,000,000	2003-2005	67,639,455
Center for Ocean Health	7,300,000	2000-2006	5,643,906
<b>TOTAL</b>	<b>57,300,000</b>		<b>73,283,361</b>
<b>GRAND TOTAL</b>	<b>\$5,473,660,000</b>		<b>\$5,724,894,799</b>

Reporting a banner year for fundraising, UC Berkeley raised by the accrual reporting convention \$318.3 million in private support, including new pledges, from alumni, parents and friends in the 2004-05 fiscal year – a nearly 83 percent gain from the previous year. The cash total for gifts and pledge payments was \$222.7 million.

The total also reflects a record number of gifts to the campus – 80,234, which came from 54,128 individual donors. It includes the largest international pledge ever received in the University's history.

Compared with last year, giving by alumni and foundations showed the most dramatic increases among donors. Alumni giving jumped 69 percent, while giving by foundations soared 194 percent.

“UC Berkeley is blessed with a generous family of alumni, parents and friends, whose collective giving will reap benefits for students and faculty for years to come,” said Vice Chancellor for University Relations Donald McQuade. “In very clear and measurable ways, the record amount raised this past year by the Cal family is a vote of confidence in Chancellor Robert Birgeneau, who has been welcomed warmly to the Berkeley fold.”

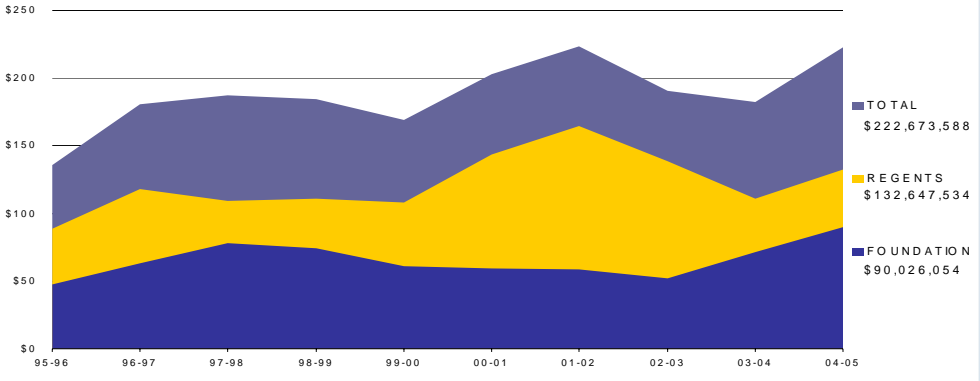
Growing numbers of donors are also going online to give. UC Berkeley's secure e-giving site – [givetocal.berkeley.edu](http://givetocal.berkeley.edu) – registered a 45 percent increase in individual donors, who used their credit cards to contribute more than \$1 million online to a menu of more than 200 different campus programs.

Top gifts and pledges included:

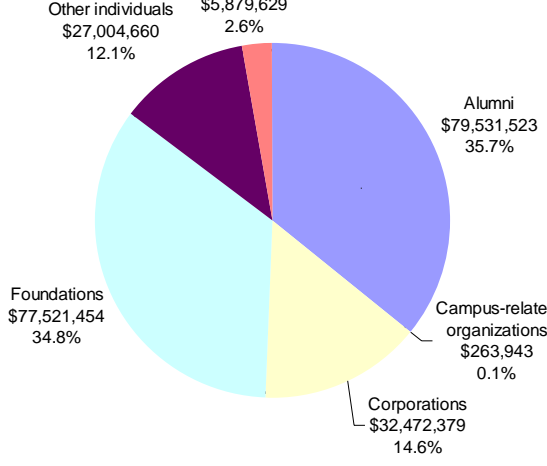
- \$40 million pledge from the Li Ka Shing Foundation to support capital projects for innovative research, including stem cell research, as part of the UC Berkeley Health Sciences Initiative. The donation, the largest international gift in the history of UC Berkeley, will go toward the Li Ka Shing Center for Biomedical and Health Sciences.
- \$25 million, given anonymously for campus capital projects.
- \$16 million from Col. Charles T. Travers '32. This includes a \$12-million trust to endow the department of political science, which has been named in honor of Travers and his late wife, Louise. It also includes \$4 million donated by Travers to support the Cal football program.

REPORTING CONVENTIONS	00-01	01-02	02-03	03-04	04-05	04-05 TOTALS
<b>CASH (CAE)</b>	Pledge Payments \$44,592,357	\$71,378,616	\$47,560,078	\$32,181,449	\$37,376,105	\$222,673,588
<b>ACCUAL (REGENTS)</b>	New Outright Gifts \$158,363,441	\$152,172,306	\$143,257,398	\$150,219,447	\$185,297,483	\$318,300,088
	New Pledges \$156,958,905	\$88,245,094	\$20,597,836	\$23,969,033	\$133,002,605	

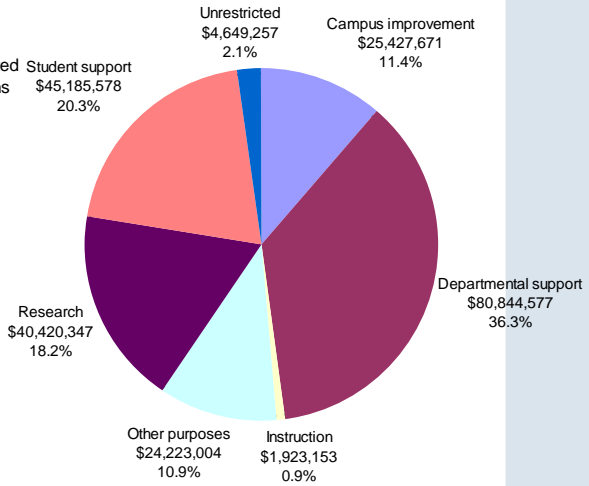
**TOTAL GIVING (\$ MILLIONS)**



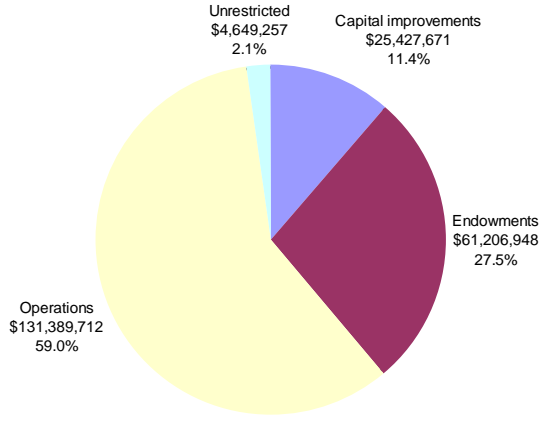
**GIFT SOURCE**



**GIFT PURPOSE**



**GIFTS FOR ENDOWMENT, CAMPUS IMPROVEMENT, OPERATIONS, AND UNRESTRICTED PURPOSES**



Data on this page reported according to cash convention. See diagram at bottom of facing page.

UC Davis recorded a jump in fundraising for the past year, receiving just over \$100 million in gifts, grants and pledge payments from alumni, parents and friends in the 2004-05 fiscal year. This is the first year in which UC Davis received over \$100 million on a cash basis.

Chancellor Larry Vanderhoef was pleased with the generous level of philanthropic support to the campus, which receives about 30 percent of its total budget from the state.

“It is gratifying to know that so many generous individuals, foundations and corporations share UC Davis’ vision and our goals to continue making new discoveries and engaging our students and global community,” Vanderhoef said. “Gift support for UC Davis is essential to our success.”

Of the \$100.2 million in gifts to UC Davis, 42 percent will fund research projects, 11 percent will support students, and 7 percent will go to departmental support. The remaining 40 percent will benefit campus improvement, instruction and other projects.

One of the largest gifts to the campus came from alumnus Michael Chapman, M.D., and his wife, Betty. The Chapmans pledged \$1 million to the UC Davis Health System Surgery and Emergency Services Pavilion. Dr. Chapman, who also chairs the board for the UC Davis Foundation, holds degrees from UC Davis and UC San Francisco. His wife attended UC Berkeley and also has a degree from UC San Francisco.

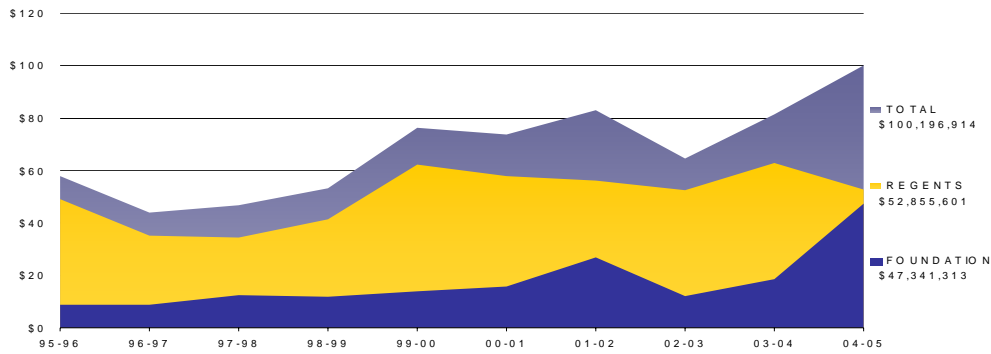
“Our lives are inextricably bound to the university,” he said. “Everything we have today is due to the fact that we were able to go to a public university at a low cost. But today’s high tuition doesn’t allow students to put themselves through school as we had done. Those of us who are able must provide support to assure that anyone willing to work hard can get a first-class education.”

More than 46,000 individuals gave to UC Davis, of which about 16,000 were alumni. In addition, 2,500 foundations, corporations and other philanthropic organizations gave to the campus to support research, teaching and other priorities.

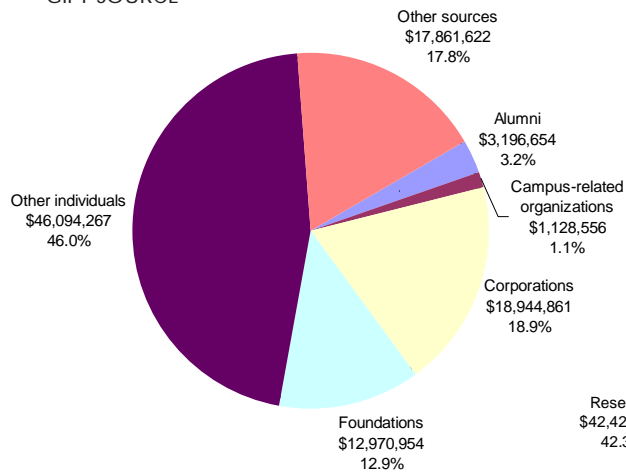
The level of philanthropic support for UC Davis remains strong. The 2004-05 fiscal year showed a marked increase in philanthropic support.

REPORTING CONVENTIONS	00-01	01-02	02-03	03-04	04-05	04-05 TOTALS
<b>CASH (CAE)</b>	Pledge Payments \$8,129,969	\$8,534,019	\$7,757,037	\$20,940,648	\$36,609,413	<b>\$100,196,914</b>
<b>ACCRUAL (REGENTS)</b>	New Outright Gifts \$65,213,694	\$74,043,602	\$57,259,654	\$60,442,424	\$63,587,501	<b>\$78,962,409</b>
	New Pledges \$12,177,849	\$35,735,239	\$14,450,833	\$11,695,047	\$15,374,907	

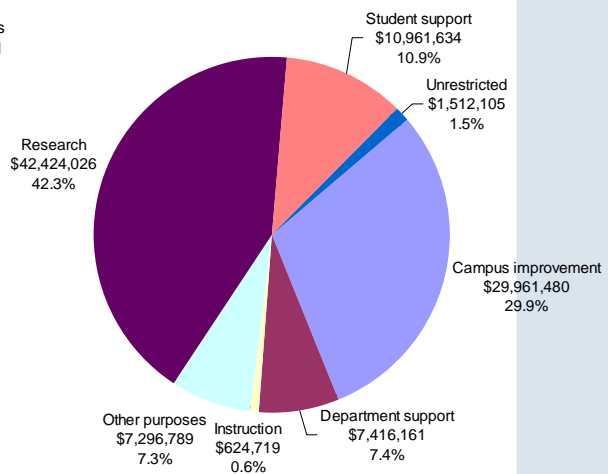
TOTAL GIVING (\$ MILLIONS)



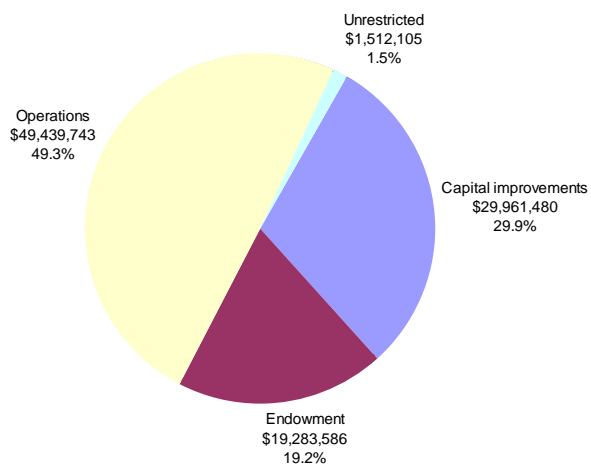
GIFT SOURCE



GIFT PURPOSE



GIFTS FOR ENDOWMENT, CAMPUS IMPROVEMENT, OPERATIONS, AND UNRESTRICTED PURPOSES



Data on this page reported according to cash convention. See diagram at bottom of facing page.

UC Irvine increased its private-giving total in 2004-05 to \$70.8 million by the accrual convention, with more than \$55 million in the cash convention. These totals continue a trend that has seen a dramatic increase since 2001-02. The amount raised in 2004-05 is the second highest in the campus's 40-year history. Additionally, the campus received a record 20,319 gifts.

"This year, as UCI marks its 40th anniversary, much has been accomplished," said Chancellor Michael Drake. "In an era of declining state support, the long-term success of the university depends on private contributions, and the generosity of our donors makes a profound difference in the lives of our students, our faculty and our society."

Private gifts contribute to UCI's future success by helping the campus achieve excellence in areas that are not fully funded by other sources. The campus sees the increase in private support as crucial to its efforts to attract and retain top faculty, provide students with the best learning environment and enable research that will offer large-scale benefits to society.

Major gifts to the campus in 2004-05 included:

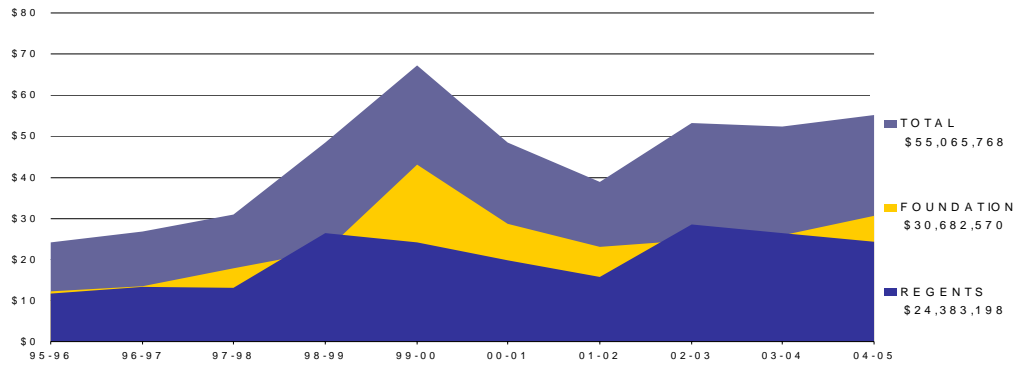
- A naming gift from business leader and philanthropist Paul Merage. The gift includes support for endowed chairs, graduate fellowships and faculty research in The Paul Merage School of Business.
- A gift from the California Community Foundation to establish the UCI Excellence in Teaching Endowed Chair in Mathematics. The gift will help attract talented research mathematicians who will take a leadership role to enhance the supply and preparation of science and mathematics teachers for California's public schools.
- A gift from business leader and philanthropist Fariborz Maseeh to establish the Dr. Samuel M. Jordan Center for Persian Studies and Culture. The gift also establishes two endowed positions in humanities and one in the arts.
- A gift from community leaders Michael and Lynette Hayde in support of the New University Hospital Campaign to Transform Health Care.

Among those contributing to UCI's success are its alumni, who share the campus's vision of becoming one of the best campuses in the nation – public or private. Over the years, alumni advocacy and support has helped the campus attain excellence. The total committed by alumni in 2004-05 was \$4.3 million, with \$3.6 million received as of June 30, 2005. These figures represent 6,675 gifts from alumni.

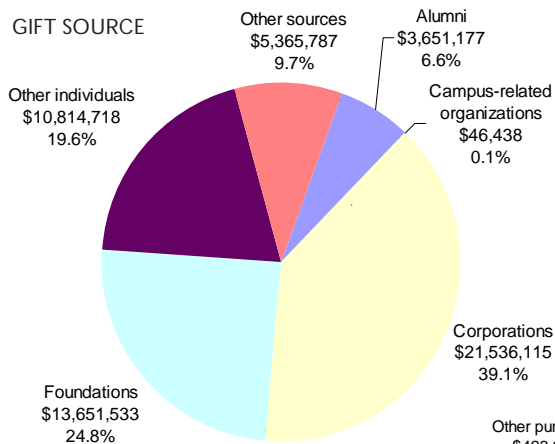
Whether providing a world-class education for high-achieving students, generating economic growth and new jobs through research innovations, or working to improve California's health care and quality of life – UCI's impact is far-reaching and growing.

REPORTING CONVENTIONS	00-01	01-02	02-03	03-04	04-05	03-04 TOTALS
CASH (CAE)	Pledge Payments	\$16,631,516	\$13,216,495	\$15,861,325	\$19,633,772	\$16,025,068
	New Outright Gifts	\$31,858,791	\$25,684,318	\$37,364,356	\$32,713,264	\$39,040,699
ACCUAL (REGENTS)	New Pledges	\$20,182,013	\$9,942,045	\$19,946,851	\$33,633,464	\$31,776,360
						<b>\$70,817,059</b>

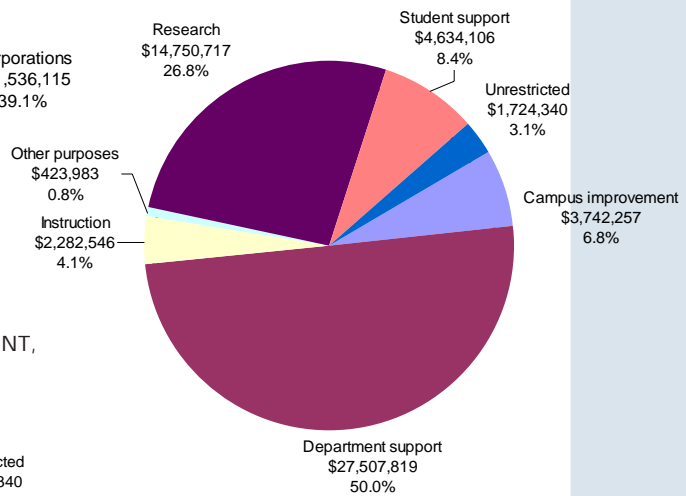
TOTAL GIVING (\$ MILLIONS)



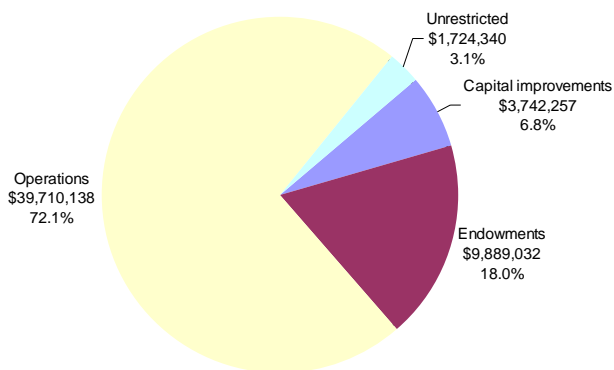
GIFT SOURCE



GIFT PURPOSE



GIFTS FOR ENDOWMENT, CAMPUS IMPROVEMENT, OPERATIONS, AND UNRESTRICTED PURPOSES



Data on this page reported according to cash convention. See diagram at bottom of facing page.

During 2004-05, Campaign UCLA received more than \$287 million by the accrual convention in private gifts, grants and pledges, the third highest total of the 10-year campaign. Outright gifts and pledge payments totaled \$281.6 million. This marks the sixth consecutive year of the campaign in which UCLA's gift total has surpassed \$250 million.

The accrual figure of \$287 million propelled the total for the campaign to over \$2.85 billion, exceeding the \$2.4 billion goal by nearly 19 percent in advance of its conclusion on Dec. 31, 2005.

Concurrent with this historic achievement in university fundraising, UCLA's Ensuring Academic Excellence Initiative generated \$54 million during 2004-05, bringing the initiative's total to nearly \$91 million. The initiative, launched in June 2004, is designed to generate \$250 million in private commitments through 2009 specifically to help attract and retain top students and faculty, a campuswide priority.

Included in the 2004-05 total were gifts to create five new endowed faculty chairs in the UCLA College and 10 new endowed chairs in the professional schools. Among these commitments was a gift of \$2 million from Mattel Children's Foundation to establish the Mattel Executive Chair in Pediatrics in the David Geffen School of Medicine.

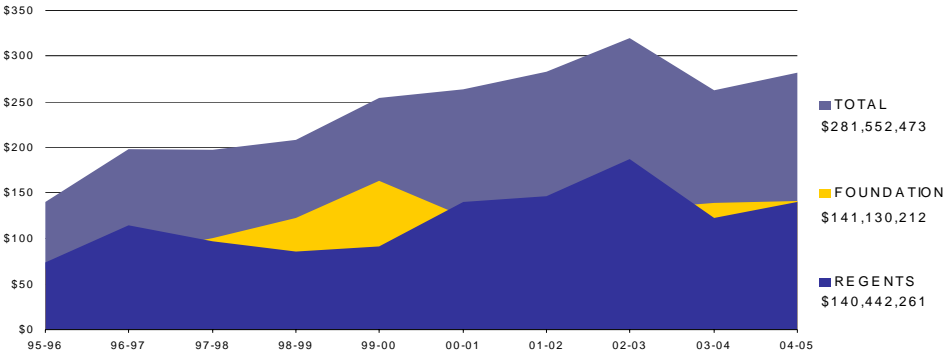
Additionally, the Division of Humanities received \$5 million from A. Richard Diebold, Jr., to endow graduate student fellowships. According to Patricia O'Brien, executive dean of the UCLA College, "Professor Diebold has been visionary and thoughtful in providing the college with the flexibility to create fellowships wherever they are most needed in the humanities, thereby inspiring the work of our most promising graduate students and enhancing our competitive edge."

Graduate student fellowship support also included \$1.2 million in bequests from the estate of Louise T. Lucio to the Graduate School of Education and Information Studies.

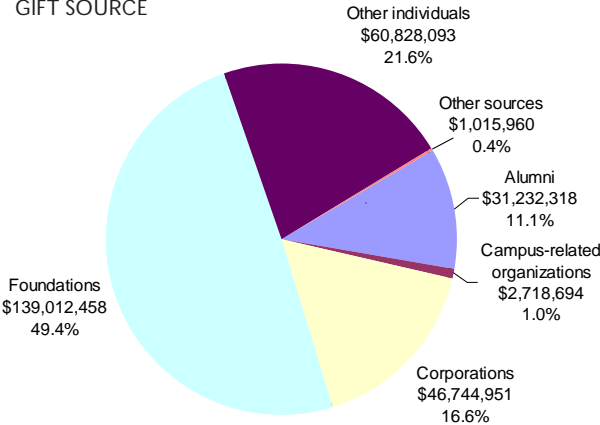
Campaign resources continue to secure UCLA's position as a leader in American higher education by supporting pioneering research, providing student and faculty support, enhancing interdisciplinary programs and enabling capital improvements.

REPORTING CONVENTIONS	00-01	01-02	02-03	03-04	04-05	03-04 TOTALS	
CASH (CAE)	Pledge Payments	\$62,740,524	\$64,201,218	\$90,078,476	\$88,857,502	\$62,786,642	\$281,552,473
	New Outright Gifts	\$175,027,283	\$195,531,177	\$224,818,644	\$173,291,085	\$218,765,830	
ACCRUAL (REGENTS)	New Pledges	\$82,239,904	\$292,398,941	\$63,286,940	\$104,732,419	\$68,692,807	\$287,458,638

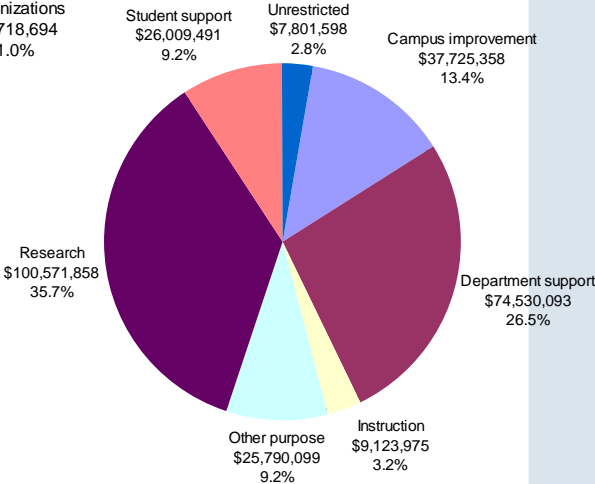
## TOTAL GIVING (\$ MILLIONS)



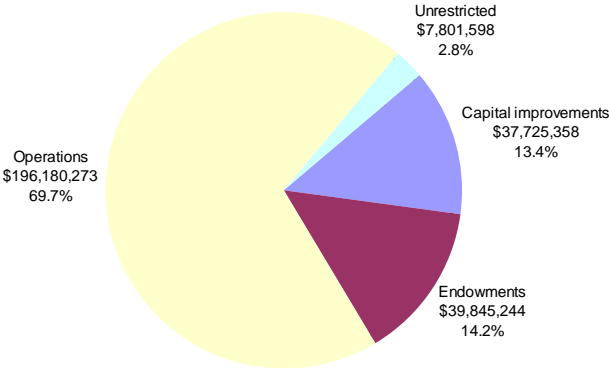
## GIFT SOURCE



## GIFT PURPOSE



## GIFTS FOR ENDOWMENT, CAMPUS IMPROVEMENT, OPERATIONS, AND UNRESTRICTED PURPOSES



Data on this page reported according to cash convention. See diagram at bottom of facing page.

On Sept. 5, 2005, UC Merced officially opened its doors as the first new UC campus in 40 years and the first UC campus in the fast-growing San Joaquin Valley. Thousands of individuals who shared in the dream of UC Merced have fueled campus progress with their support.

Through the auspices of the San Joaquin Valley UC Alumni Network, UC alumni from all the sister campuses have dedicated themselves to raising awareness of the new campus, assisting with student outreach and admissions activities, taking the university's messages to legislators in Sacramento, reaching out to UC Merced's first students and helping with other efforts to aid the new campus. A debt of gratitude is owed to the UC alumni associations for their contributions to UC Merced and for their guidance.

Over the years, several UC alumni also have been among the donors who are building a strong foundation of private support for UC Merced. For 2004-05, the campus is thankful to have received more than \$5.1 million, by both the cash and accrual conventions, in private support.

Among this past year's philanthropic highlights, UC Regent Frederick "Fred" Ruiz, chairman of Ruiz Foods, and his wife, Mitzie, pledged \$500,000 to establish the Ruiz Family Chair in Entrepreneurship. The Ruiz Chair – Merced's 16<sup>th</sup> endowed chair commitment – will support teaching, research and public service in entrepreneurship and related disciplines.

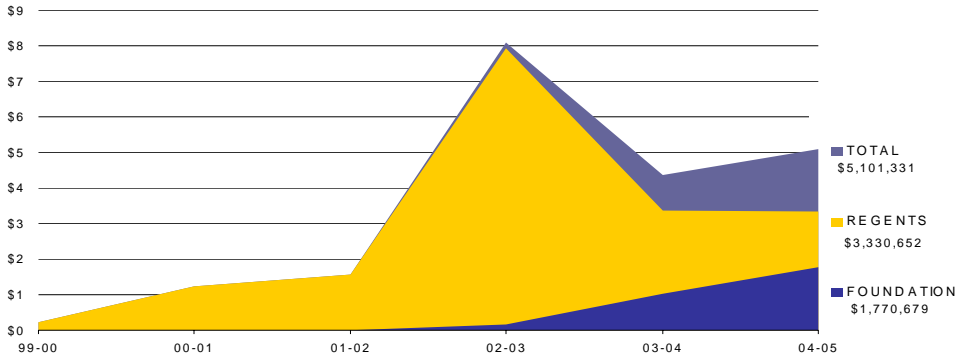
The Max and Verda Foster Family of Foster Farms committed \$1.2 million to fund the Foster Family Center for Engineering Service Learning, where teams of students are developing engineering and management skills as they design solutions to meet the needs of non-profit organizations in the region.

Additionally, the Bank of America Charitable Foundation awarded a \$1 million grant to UC Merced to recruit and retain high-achieving, educationally disadvantaged students from the San Joaquin Valley in the planned Ernest and Julio Gallo School of Management. The ultimate goal of the Bank of America Distinguished Management Scholars Program is to cultivate future business leaders who will remain in the region and work toward improving economic and social conditions. Selected as the first Bank of America Scholars, 11 management majors from the inaugural class have already received \$1,000 scholarships.

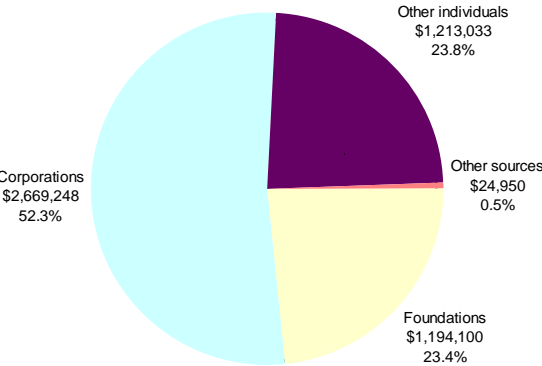
The Educational Employees Credit Union of Fresno, with its gift of \$200,000, has supported the technology needs related to the research observation area in the planned UC Merced Early Care and Education Center. Envisioned as a state-of-the-art child development and early education facility, the innovative center will provide vital services to the community.

REPORTING CONVENTIONS	00-01	01-02	02-03	03-04	04-05	03-04 TOTALS	
CASH (CAE)	Pledge Payments	\$1,203,000	\$1,373,234	\$6,728,929	\$2,471,606	\$2,784,846	\$5,101,331
	New Outright Gifts	\$18,993	\$196,843	\$1,364,061	\$1,902,342	\$2,316,485	
	New Pledges	\$5,020,000	\$22,038,000	\$2,253,700	\$2,708,100	\$2,786,750	
ACCUAL (REGENTS)						\$5,103,235	

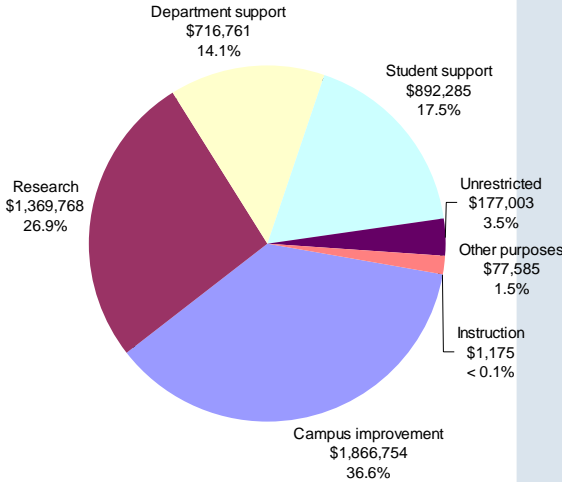
TOTAL GIVING (\$ MILLIONS)



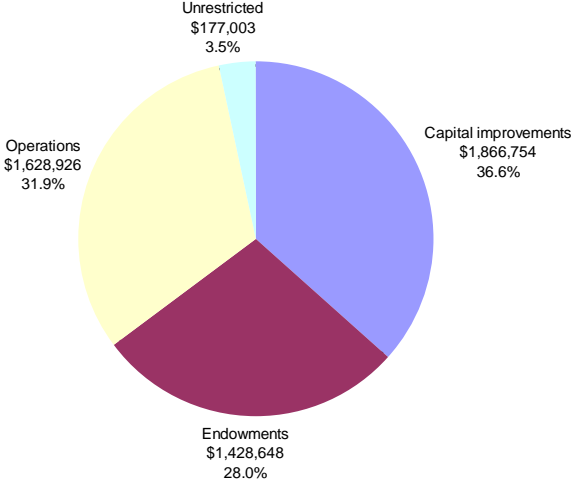
GIFT SOURCE



GIFT PURPOSE



GIFTS FOR ENDOWMENT, CAMPUS IMPROVEMENT, OPERATIONS, AND UNRESTRICTED PURPOSES



Data on this page reported according to cash convention. See diagram at bottom of facing page.

UC Riverside completed its first significant capital campaign early and exceeded the \$50 million goal. Evolutions: UCR's 50<sup>th</sup> Anniversary Campaign closed eight months ahead of schedule on April 30, 2005. "The community and alumni stepped up to help us mark the special occasion of the 50<sup>th</sup> anniversary of the arrival of our first UC class of students," said Chancellor France A. Cordova.

The fundraising effort netted \$50.9 million from 10,190 donors, nearly half of these first-time givers to the campus, according to Vice Chancellor for Advancement William G. Boldt. The campaign helped to provide funding for scholarships, fellowships, academic programs and a variety of campuswide educational initiatives.

One of those initiatives, UCR Palm Desert, benefited from Richard J. Heckmann making the final \$1.6 million payment on a much larger pledge to help fund the International Center for Entrepreneurial management named for him. Other campuswide initiatives benefiting from the campaign were the Culver Center of the Arts and the Engineering II building.

UCR received significant support from the California Avocado Commission and the Citrus Research Board to continue the work in plant science totaling \$1,729,111.

Two transactions not included in the fiscal year totals were \$1 million pledge from the UCR Alumni Association to build the Alumni and Visitors Center and \$2.25 million from the Riverside City Council to help create the Barbara & Art Culver Center of the Arts, a joint venture with UC Riverside that local leaders hope will serve as a catalyst for downtown revitalization.

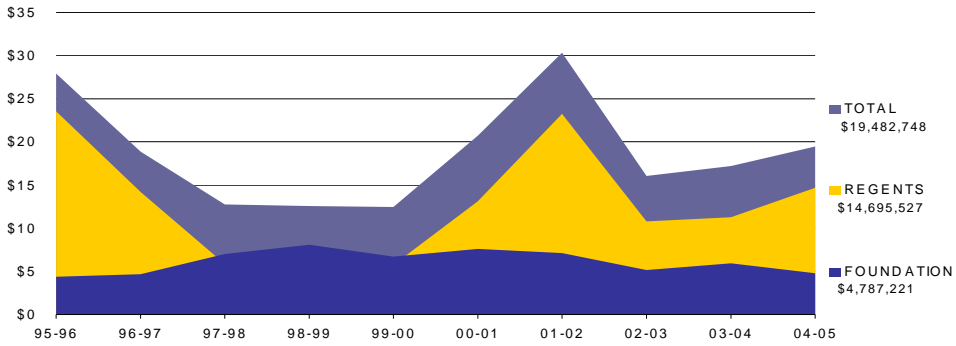
The fiscal year total in private support was \$19.5 million from alumni, friends, corporations and foundations by the cash convention and \$20 million by the accrual convention.

More than 1,134 UCR alumni were acquired as new donors, while an additional 439 alumni donors made increased gifts and pledges. This year, more than 63 percent of UCR Trustees participated in UCR's Chancellor's Associates program as well.

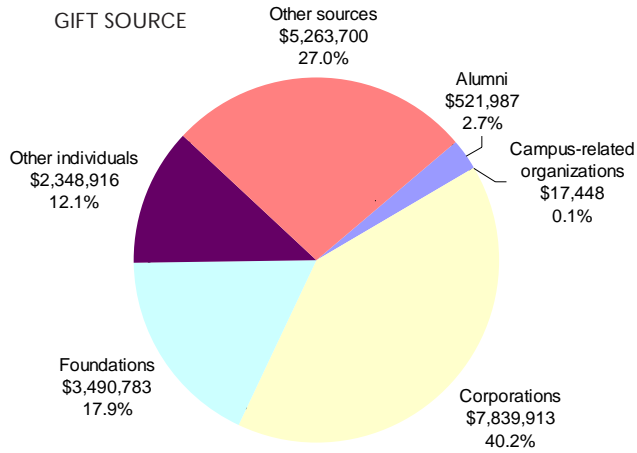
The campus magazine, Fiat Lux, was redesigned to appeal to a broader audience.

REPORTING CONVENTIONS	00-01	01-02	02-03	03-04	04-05	04-05 TOTALS	
CASH (CAE)	Pledge Payments	\$1,102,720	\$4,276,900	\$2,627,463	\$7,030,277	\$4,354,540	\$19,482,748
	New Outright Gifts	\$17,897,899	\$25,989,900	\$13,407,474	\$10,193,209	\$15,128,207	
ACCRUAL (REGENTS)	New Pledges	\$1,102,720	\$5,541,227	\$6,120,621	\$1,269,777	\$4,920,004	\$20,048,211

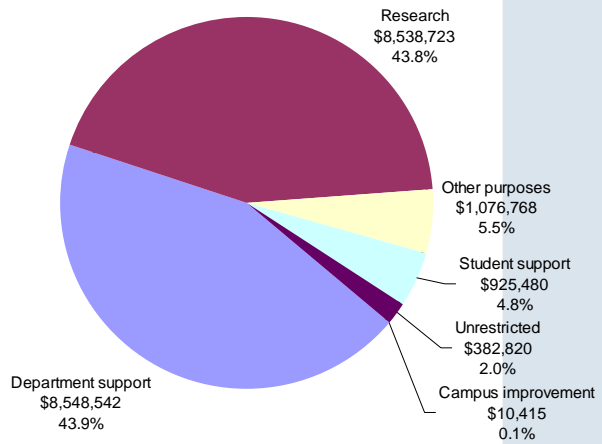
## TOTAL GIVING (\$ MILLIONS)



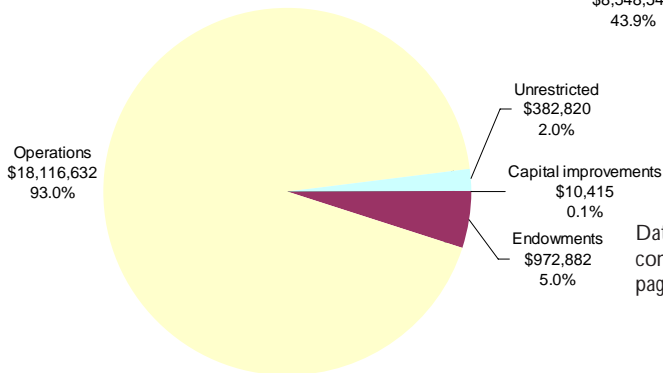
## GIFT SOURCE



## GIFT PURPOSE



## GIFTS FOR ENDOWMENT, CAMPUS IMPROVEMENT, OPERATIONS, AND UNRESTRICTED PURPOSES



Data on this page reported according to cash convention. See diagram at bottom of facing page.

Private support to UC San Diego totaled \$147.3 million by the accrual convention in 2004-05, making it the most successful year in private support in the history of the campus. This is an 11.5 percent increase over the prior year and the sixth of seven consecutive years the campus has surpassed the \$100 million mark in annual private support. Outright gifts and pledge payments totaled \$140.2 million in the cash convention.

The successful fundraising year helped propel The Campaign for UCSD: *Imagine What's Next* toward its \$1-billion goal. At the close of the fiscal year, the campaign had raised \$754.1 million. The comprehensive campaign supports students and faculty, expands academic programs, funds research endeavors and strengthens innovation funds to meet the highest priority needs. While there is much work to be done over the next two years, the campaign is on track to achieve its \$1-billion goal by June 2007.

The campus is grateful to the nearly 31,000 alumni, parents and friends who demonstrated their belief in the power of the imagination this past year by supporting The Campaign for UCSD, especially those who made it possible to achieve these major milestones:

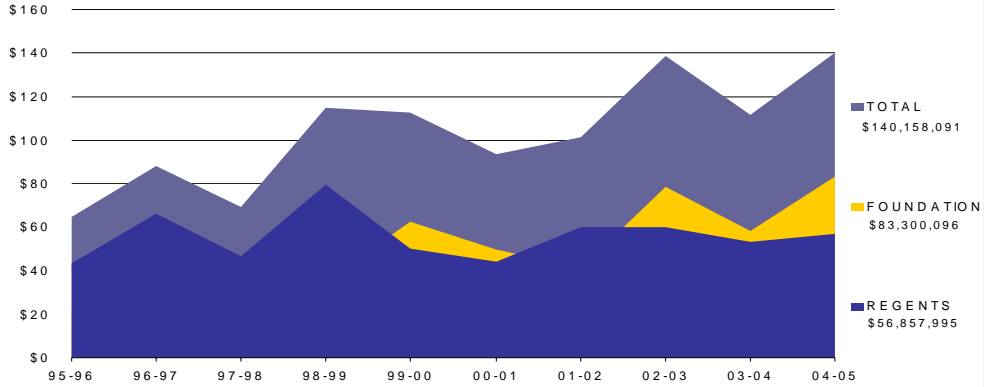
- A \$30 million pledge from The Skaggs Institute for Research to support groundbreaking academic and research efforts at the Skaggs School of Pharmacy and Pharmaceutical Sciences.
- A commitment of \$10 million from Richard and Maria (Gaby) Sulpizio to support the Sulpizio Family Cardiovascular Center initiative, a state-of-the-art facility for UCSD's patient care and clinical research activities in heart and vascular disease and stroke management.
- A \$4 million gift from Donald and Darlene Shiley that supports UCSD's renowned Alzheimer's disease research at the Shiley-Marcos Alzheimer's Disease Research Center.
- A gift of \$4 million from Science Applications International Corp. to the Beyster Institute at the Rady School of Management to promote global entrepreneurship, employee ownership and economic development.
- A gift of \$4.8 million from the Rik and Flo Henrikson Trust for an unrestricted endowment for the campus's greatest needs, such as student scholarships and fellowships.
- Establishment of two endowed chairs at the Rady School of Management, through gifts of \$500,000 from each of the following couples: Sheryl and Harvey White, Rita and Richard Atkinson, and Phyllis and Daniel Epstein.

"Extraordinary things are happening in classrooms and laboratories across the UCSD campus, and this progress is a direct result of the generous gifts from many individuals, families, foundations and corporations," said Chancellor Marye Anne Fox.

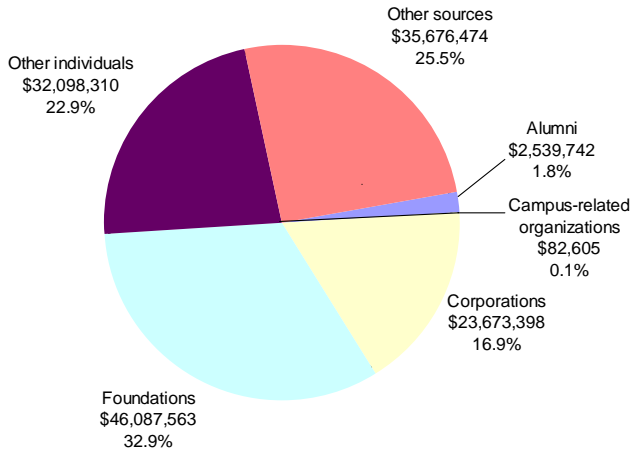
In addition to strong community support, UCSD's young alumni base is also playing an important role in the campaign's success. In fact, nearly 28 percent of the donors to the campaign are alumni. Since the launch of the campaign in July 2000, more than 21,000 alumni have shown an unwavering commitment to UCSD, contributing in excess of \$12 million.

REPORTING CONVENTIONS	00-01	01-02	02-03	03-04	04-05	04-05 TOTALS
CASH (CAE)	New Pledges					
	\$22,898,883	\$21,176,904	\$21,652,886	\$22,576,808	\$32,319,305	\$140,158,091
ACCRUAL (REGENTS)	New Outright Gifts					
	\$74,138,142	\$77,851,264	\$115,385,646	\$89,014,192	\$107,838,786	\$147,335,910
	Pledge Payments					
	\$48,820,070	\$23,373,853	\$15,717,217	\$42,949,751	\$39,497,123	

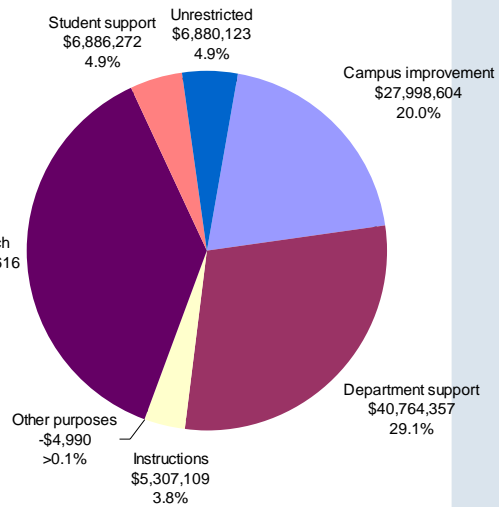
## TOTAL GIVING (\$ MILLIONS)



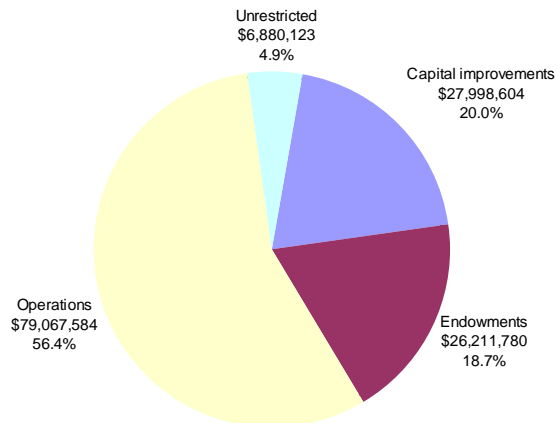
## GIFT SOURCE



## GIFT PURPOSE



## GIFTS FOR ENDOWMENT, CAMPUS IMPROVEMENT, OPERATIONS, AND UNRESTRICTED PURPOSES



Data on this page reported according to cash convention. See diagram at bottom of facing page.

A remarkable fundraising effort that netted more than \$1.6 billion for health-related research, education, patient care, community outreach and capital projects, the seven-year “Campaign for UCSF,” concluded in 2004-05. This comprehensive campaign was not only the most ambitious in the history of UC San Francisco, but also the largest university campaign focused exclusively on improving human health.

The results of the campaign exceeded expectations, as donors from around the globe responded with \$265 million more than the dollar goal of \$1.4 billion. During the past year alone, a record 32,400 donors gave \$286.4 million in gifts and pledges to the campus, pushing the final campaign total to \$1.7 billion. The year’s gifts and pledge payments totaled \$292.9 million by the cash convention.

Critically important to this success was generous support from alumni of the Schools of Dentistry, Medicine, Nursing and Pharmacy. Unique in the UC system as the only campus without an undergraduate program, UCSF prepares its students for careers in the healing professions. In return, 22 percent of UCSF alumni consistently give back to their alma mater, the highest alumni giving participation of all the UC campuses.

Harry W. Hind, a 1939 graduate of the School of Pharmacy, and his wife, Diana, showed their appreciation for his UCSF education by donating \$2.5 million to establish a distinguished professorship in pharmaceutical sciences and \$1 million to establish a dean’s endowment fund. He is renowned as the inventor of the wetting solution that revolutionized the contact lens industry.

After establishing an endowed chair in health-care ethics and spirituality two years ago, School of Nursing graduate Thelma Shobe Cook, RN, PHN, MPH, ’52, gave an additional \$500,000 this year to establish an endowed lectureship on the same topic. Cook emphasizes the need for students, faculty and other health-care providers to consider a dimension of health care beyond the physiological.

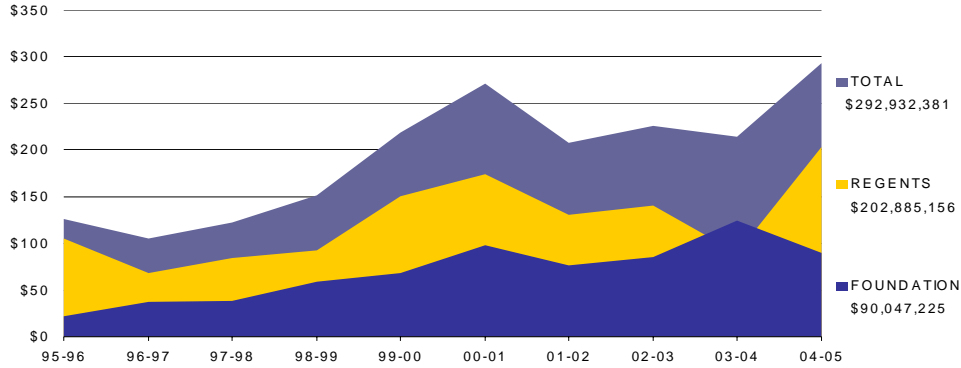
The UCSF Nursing Alumni Association is also an active supporter of the School of Nursing, pledging \$100,000 to create an endowed scholarship fund to attract the best and brightest scholars.

Faustino Bernadett, a 1980 School of Medicine graduate, marked his 25<sup>th</sup> reunion by creating an endowed scholarship fund with a \$100,000 gift. He also actively encouraged his classmates to support the fund, which aims to increase the number of Latinos in medical school by assisting Spanish-speaking students with tuition and fees. From an economically disadvantaged family himself, Bernadett was only able to attend UCSF because he received a Regents Scholarship.

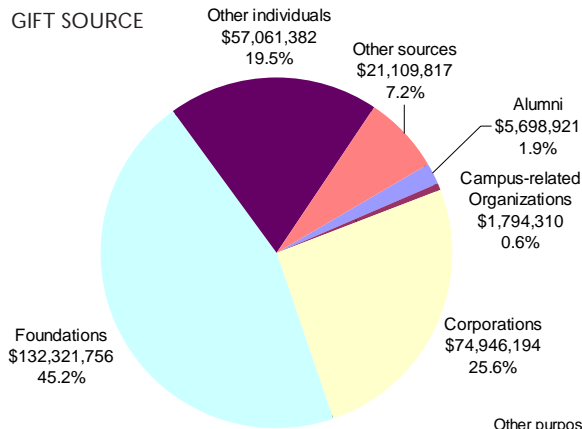
REPORTING CONVENTIONS	00-01	01-02	02-03	03-04	04-05	04-05 TOTALS
<b>CASH (CAE)</b>	<b>Pledge Payments</b> \$110,827,703	\$38,351,907	\$47,946,084	\$64,755,711	\$48,212,621	<b>\$292,932,381</b>
<b>ACCRUAL (REGENTS)</b>	<b>New Outright Gifts</b> \$160,547,864	\$168,873,610	\$177,651,058	\$152,891,169	\$244,719,760	<b>\$286,364,479</b>
	<b>New Pledges</b> \$79,406,446	\$36,194,039	\$33,087,642	\$100,811,917	\$41,644,719	

# SAN FRANCISCO

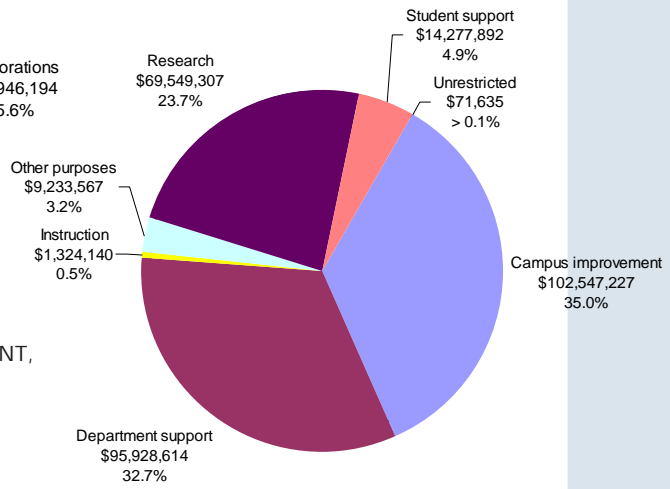
## TOTAL GIVING (\$ MILLIONS)



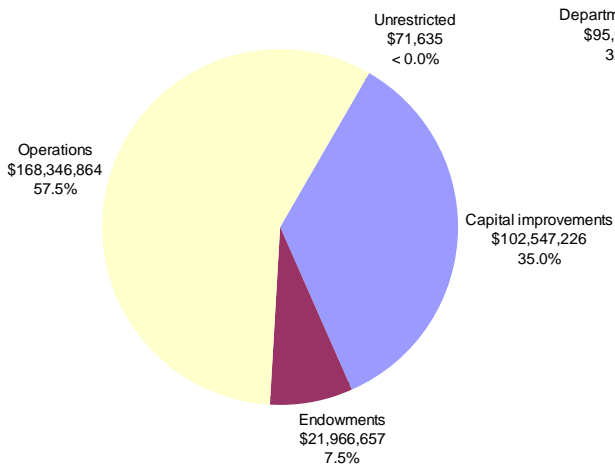
## GIFT SOURCE



## GIFT PURPOSE



## GIFTS FOR ENDOWMENT, CAMPUS IMPROVEMENT, OPERATIONS, AND UNRESTRICTED PURPOSES



Data on this page reported according to cash convention. See diagram at bottom of facing page.

## SANTA BARBARA

# THE CAMPUSES

2004-05

Alumni and friends of UC Santa Barbara contributed more than \$66.5 million by the accrual convention to the campus during 2004-05, helping to set a strong pace for The Campaign for UC Santa Barbara. Of that amount, cash received during the past year in outright gifts and pledge payments totaled \$49 million.

In May 2005, the campaign's original \$350 million goal was revised upward to \$500 million, and by the end of June 2005, a total of \$296 million had been committed in gifts and pledges.

In 2004-05, UCSB received a total of 27,444 gifts, up more than 25 percent from the previous year. This significant rise was due primarily to an increase in alumni giving.

The year's success toward the campaign goal was highlighted by many exceptionally generous donations. These included an additional major commitment of \$5 million from Orange County business leader and philanthropist Donald Bren for the Donald Bren School of Environmental Science and Management. The total gift establishes 11 endowments to support nine endowed chairs, a distinguished visiting professor program, and fellowships for students pursuing master's degrees.

Another endowed chair will be created with a \$500,000 gift from UCSB Foundation Trustee Susan Worster and her husband, Bruce, both UCSB graduates. This is the second chair the couple has created at UCSB.

With a multiyear commitment of \$500,000 annually, Kinko's founder Paul Orfalea and the Orfalea Family Foundation established a novel graduate program and a new center in global and international studies that will focus on the academic preparation of professionals to work in the global non-profit sector, as well as in international government and multinational business.

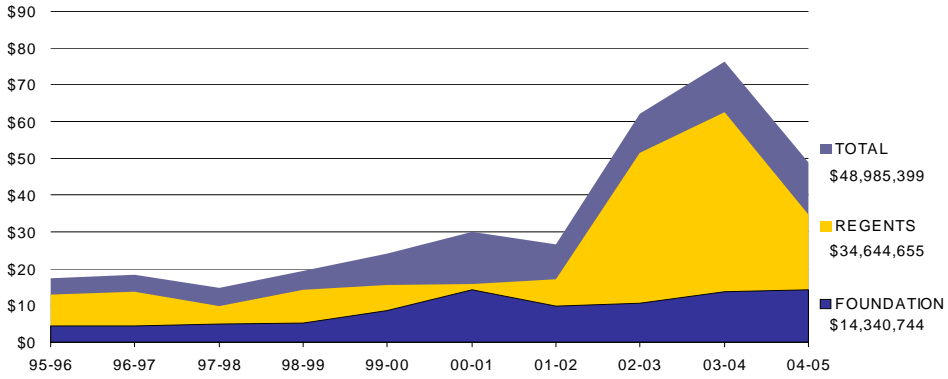
In addition, UCSB Foundation Trustee Mark Bertelsen and his wife, Susan – both UCSB alumni – gave \$1 million to foster entrepreneurial education in the College of Engineering and to support research on the social impact of technology at the Center for Information Technology and Society.

Private gifts for campus building projects also increased. Leadership gifts for construction of the Center for Film, Television and New Media included \$2 million from an anonymous donor and \$1 million from the Annenberg Foundation. Wallis Annenberg, vice president of the foundation, is an honorary member of the center's distinguished advisory board.

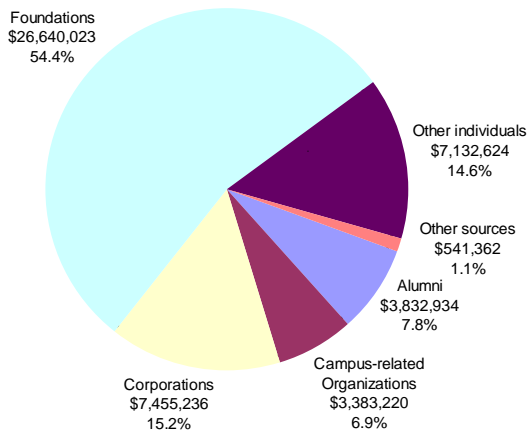
REPORTING CONVENTIONS	00-01	01-02	02-03	03-04	04-05	04-05 TOTALS
<b>CASH (CAE)</b>	Pledge Payments \$11,582,046	\$11,250,502	\$18,975,689	\$14,028,177	\$15,754,047	\$48,985,398
<b>ACCRUAL (REGENTS)</b>	New Outright Gifts \$20,742,429	\$15,469,747	\$43,092,827	\$62,186,963	\$33,231,352	\$66,488,973
	New Pledges \$27,288,168	\$35,892,546	\$7,294,964	\$17,978,137	\$33,257,621	

# SANTA BARBARA

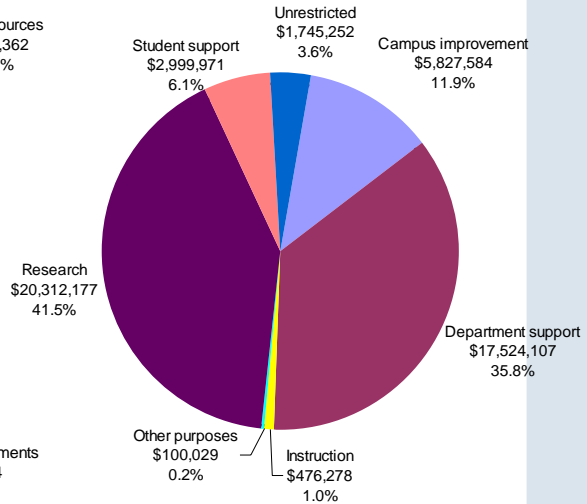
TOTAL GIVING (\$ MILLIONS)



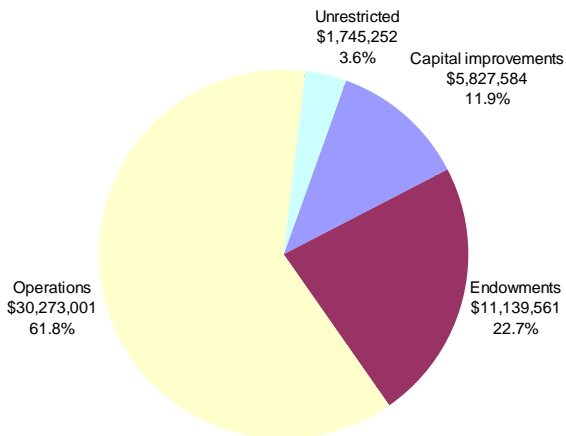
GIFT SOURCE



GIFT PURPOSE



GIFTS FOR ENDOWMENT, CAMPUS IMPROVEMENT, OPERATIONS, AND UNRESTRICTED PURPOSES



Data on this page reported according to cash convention. See diagram at bottom of facing page.

Led by grants promoting ocean research and drawing on strong support from alumni, private gifts, grants and pledges to UC Santa Cruz reached \$35.4 million by the accrual convention during 2004-05. Outright gifts and pledge payments totaled more than \$25 million.

“Across the range of disciplines, from social sciences, humanities, and the physical and biological sciences to arts and engineering, our donors are making a positive difference at UC Santa Cruz,” said Chancellor Denice D. Denton. “We depend on their generosity and support, and are very grateful for it.”

Drawing the largest share of private support was a long-term collaborative research project studying and monitoring coastal ecosystems. The Gordon and Betty Moore Foundation and the David and Lucile Packard Foundation together contributed more than \$7 million to UC Santa Cruz for its role in the Partnership for Interdisciplinary Studies of Coastal Oceans.

The largest single contribution was the \$6.5 million in-kind gift from Texas Instruments of a large industrial facility and the surrounding 18.5-acre site. The building, in Santa Cruz near the array of campus research facilities at Long Marine Laboratory, is well suited for classrooms, laboratories and offices.

Foundation trustee Kit Mura-smith, who came to the campus as a re-entry student, contributed the largest single amount ever from a UC Santa Cruz graduate. Her \$1.4 million planned gift will be split between scholarships for re-entry students and the McHenry Library, the campus’s main library.

Alumni support was impressive across the campus, with more than \$1.7 million in reunion giving. Alumni also contributed \$709,858 of the more than \$2.7 million given to the Annual Fund. The Telephone Outreach Program, which contacts alumni as well as students’ parents, raised nearly \$1.2 million, a record for the second year in a row.

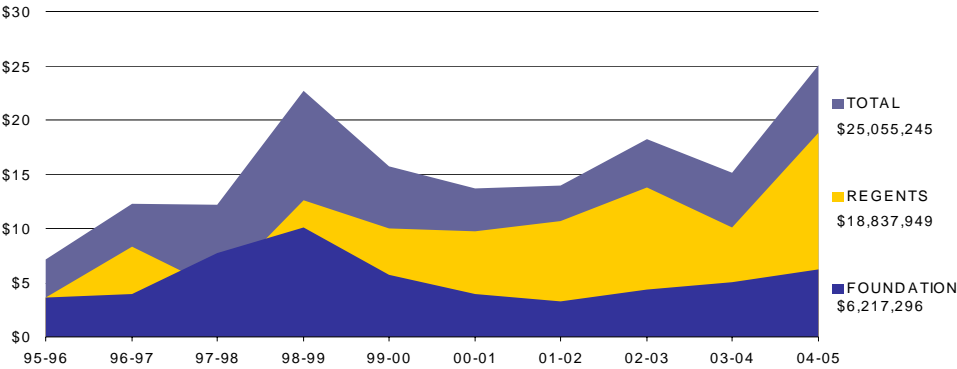
UC Santa Cruz Foundation trustees contributed more than \$2.5 million to the campus.

The largest single gift from an estate came from Federico and Rena Perlino, who ran a chicken-processing plant in Santa Cruz for many years and were known for their modest lifestyle, hard work and frugality. Their gift of nearly \$420,000 will support graduate students in psychology who are working with deaf or hearing-impaired individuals.

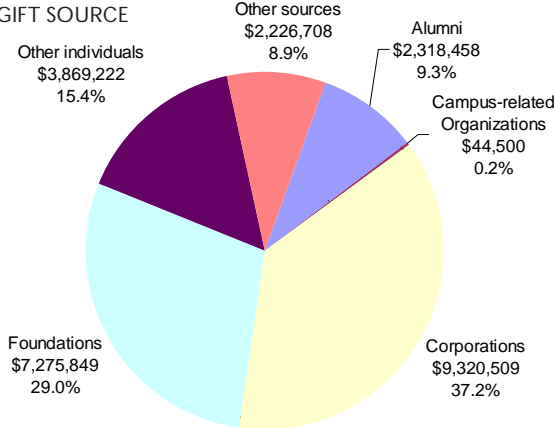
REPORTING CONVENTIONS	00-01	01-02	02-03	03-04	04-05	04-05 TOTALS
CASH (CAE)	New Pledges \$4,801,001	\$2,383,751	\$8,069,604	\$1,776,951	\$5,830,877	\$25,055,245
	New Outright Gifts \$8,868,696	\$11,556,413	\$10,120,551	\$13,320,995	\$19,224,367	
ACCRUAL (REGENTS)	Pledge Payments \$4,636,889	\$1,900,497	\$12,539,854	\$18,933,640	\$16,157,888	\$35,382,255

# SANTA CRUZ

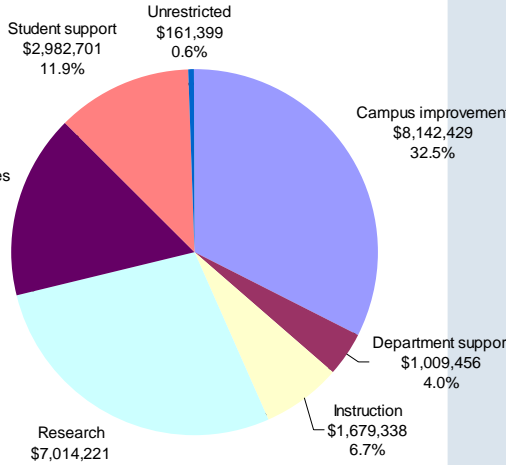
## TOTAL GIVING (\$ MILLIONS)



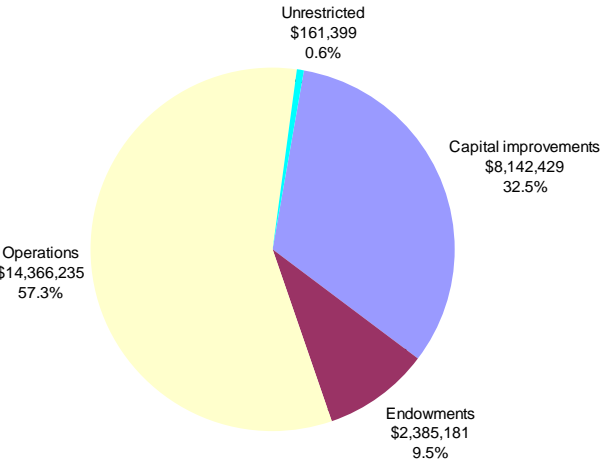
## GIFT SOURCE



## GIFT PURPOSE



## GIFTS FOR ENDOWMENT, CAMPUS IMPROVEMENT, OPERATIONS, AND UNRESTRICTED PURPOSES



Data on this page reported according to cash convention. See diagram at bottom of facing page.

# UNIVERSITYWIDE AND MULTI-CAMPUS PROGRAMS

2004-05

The Universitywide programs include multi-campus research units; the three national laboratories that UC manages under contract with the federal government; the Mathematics, Engineering, Science Achievement (MESA) student outreach program; the Puente Project, another important and successful outreach for students statewide; the Education Abroad Program; and the University of California Press. The programs also include COSMOS (California State Summer School for Math Sciences), a summer residency program for 9th through 12th grade students with exceptional aptitude in math and science and the Science and Math Initiative (SMI) which has the goal to produce 1,000 science and math teachers annually by 2010.

Multi-campus research units include the Humanities Research Institute, and the state funded Breast Cancer Research and Tobacco Research Programs, among others.

The U.S. Department of Energy national laboratories include the E. O. Lawrence Berkeley National Laboratory and the Lawrence Livermore National Laboratory in California, and the Los Alamos National Laboratory in New Mexico.

The MESA program assists educationally disadvantaged students at pre-college, community college and university levels to excel in math and science and ultimately to attain degrees in math-based fields.

The Puente Project has helped tens of thousands of educationally under-served students to succeed in college through its innovative combination of accelerated writing instruction, academic counseling and mentoring by community professionals. In California, Puente is located in 59 community colleges and 34 high schools. Its goal is to prepare and enroll students in four-year institutions such as UC.

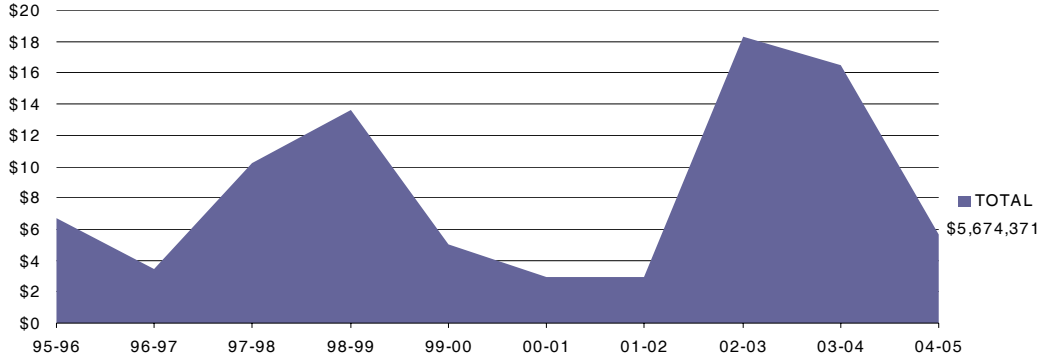
The Education Abroad Program provides foreign study for over 4,200 students at more than 150 institutions in 35 countries. In most cases, UC students are fully integrated into the academic curriculum of the foreign host university, and UC students study alongside their native counterparts. Through its exchanges, partnerships and initiatives, EAP expands the scope of education at UC by giving students access to the vast new sources of knowledge available worldwide, to special pedagogical methods and field study opportunities, and to widely varying cultural, social, political and economic environments.

University of California Press, the nonprofit publishing arm of UC, is one of the nation's largest university publishers. It has earned worldwide recognition for its innovative titles and excellence in book design and production. Each year, it publishes 180 new clothbound books annually and more than 50 scholarly journals. Approximately one-third of its books are written by UC faculty.

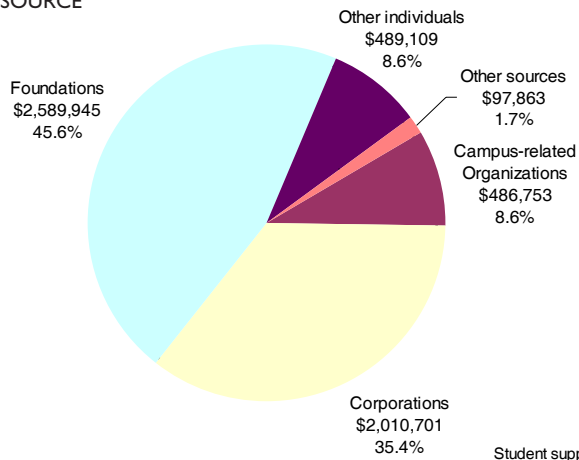
REPORTING CONVENTIONS	00-01	01-02	02-03	03-04	04-05	04-05 TOTALS
<b>CASH (CAE)</b>	<b>Pledge Payments</b>					
	\$950	\$462,050	\$384,803	\$465,000	\$150,000	\$5,674,371
	<b>New Outright Gifts</b>					
	\$2,918,936	\$2,485,244	\$17,926,526	\$15,984,131	\$5,524,371	\$5,525,371
<b>ACCRUALS (REGENTS)</b>	<b>New Pledges</b>					
	\$1,623,528	\$61,300	\$369,403	\$746,500	\$0	

# UNIVERSITYWIDE AND MULTI-CAMPUS PROGRAMS

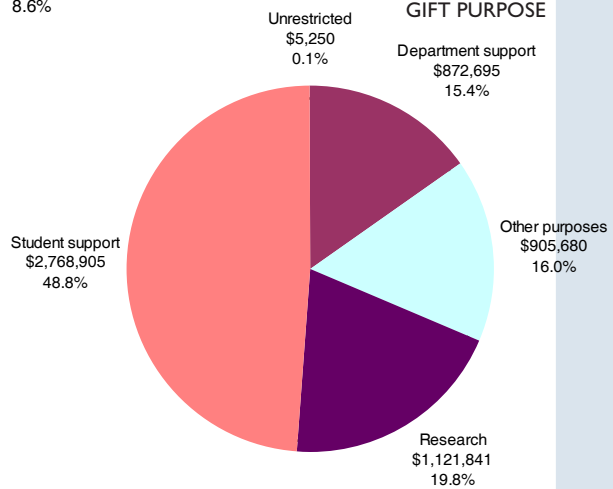
TOTAL GIVING (\$ MILLIONS)



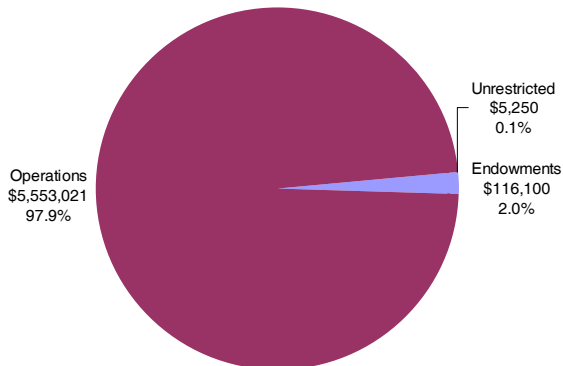
GIFT SOURCE



GIFT PURPOSE



GIFTS FOR ENDOWMENT, CAMPUS IMPROVEMENT, OPERATIONS, AND UNRESTRICTED PURPOSES



Data on this page reported according to cash convention. See diagram at bottom of facing page.

# PRIVATE SUPPORT

## Campus Foundation Leadership

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### UC BERKELEY FOUNDATION

Website: [www.urel.berkeley.edu/foundation/](http://www.urel.berkeley.edu/foundation/)

#### Executive Officers

Chair: Robert G. O'Donnell '65, M.B.A. '66, Atherton  
Vice Chair: William F. Ausfahl '61, Moraga  
Chair–Audit Committee: Cheryl Ann Valentine '79, M.B.A. '91, Walnut Creek  
Vice Chair–Audit Committee: Arnold Silverman '60, M.S. '61, Atherton  
Chair–Investment Committee: Robert B. Beim '66, Atherton  
Vice Chair–Investment Committee: D. Clayton Bentley II '75, Lafayette  
Chair–Governance Committee: Rick J. Holmstrom M.B.A. '98, Palo Alto  
Vice Chair–Governance Committee: Kathleen G. Correia '76, Lafayette  
Chair–Programs Committee: Katherine Lau '88, Los Altos  
Vice Chair–Programs Committee: Andrea Roth, Los Angeles  
Immediate Past Chair: Dwight L. Barker '59, Orinda

#### Administrative Officers

President: Donald A. McQuade, Vice Chancellor-University Relations  
Vice President: F. Scott Bidy, Associate Vice Chancellor-University Relations  
Vice President: Jan Corazza, Assistant Vice Chancellor-University Relations  
Vice President: Irene Kim, Director, Development Planning-University Relations  
Vice President: Patrick O'Leary, Chief Administrative Officer-University Relations  
Secretary: Mia Chung, Assistant Director, Development Planning-University Relations  
Assistant Secretary: Aileen K. Kim, Assistant to the Vice Chancellor-University Relations  
Treasurer: Sri Mugunthan Renganathan, Director-Financial Services  
Assistant Treasurer: Sylvia A. Worthington, Senior Security Analyst

### UC DAVIS FOUNDATION

Website: [www.development.ucdavis.edu/found/](http://www.development.ucdavis.edu/found/)

#### Executive Officers

Chair: Michael W. Chapman '58, Sacramento  
Vice Chair: Glenn Nedwin, Davis  
Chair-Finance & Investment Committee: Michael Child '76, Atherton  
Chair-Nominating Committee: Meg Stallard '68, Woodland  
Chair-Development Committee: Gerhard (Gerry) Parker, Los Gatos  
Chair-Audit Committee: J. Terry Eager, El Macero  
Chancellor – Larry N. Vanderhoef  
Executive Director: Beverly "Babs" Sandeen, Interim Vice Chancellor-University Relations  
Chief Financial Officer: Isabella Corbin, Director of Finance, Information Management & Administrative Services

### UC IRVINE FOUNDATION

Website: [www.foundation.uci.edu](http://www.foundation.uci.edu)

#### Officers

Chair: Douglas K. Freeman  
Chair - Investment & Finance: Rick Keller  
Chair - Nomination & Board Development: Ted Smith  
Chair - Strategy Planning Committee: Jim Mazzo  
Chair - Audit Committee: Paul Frederic Marx  
General Counsel: Paul Frederic Marx  
President: Thomas J. Mitchell, Vice Chancellor, University Advancement  
Chief Financial Officer: Lynn Rahn, Executive Director-Business & Finance, University Advancement  
Secretary: Margie Jacobs, UCI Foundation Liaison, University Advancement

### UC LOS ANGELES FOUNDATION

Website: [www.Foundation.UCLA.edu](http://www.Foundation.UCLA.edu)

#### Executive Officers

Chair: Herbert G. Kawahara '51, Rolling Hills Estates  
Chair-Elect: James T. McCarthy, San Diego  
Immediate Past Chair: Peter J. Taylor '80, Los Angeles  
Chair - Campaign UCLA: Robert S. Wilson '53, Rancho Santa Fe  
Executive Vice President: Michael C. Eicher, Vice Chancellor-External Affairs  
Vice President-Development: Rhea Turteltaub, Associate Vice Chancellor-Development  
Vice President-Finance/Treasurer: Neal D. Axelrod, Assistant Vice Chancellor-Finance & Information Management '76  
Executive Director & Secretary: Peter A. Hayashida, Assistant Vice Chancellor-External Affairs '88

# PRIVATE SUPPORT

## Campus Foundation Leadership

### UC MERCED FOUNDATION

#### Executive Officers

Chair: Robert W. Carpenter, Merced  
Vice Chair: JoAnn N. Bertges, San Francisco  
Secretary: Lazar C. Piro, Turlock  
Treasurer: Rayburn S. Dezember, Bakersfield  
Corporate President: Carol Tomlinson-Keasey, Chancellor  
Corporate Vice President/Executive Director: John Garamendi, Jr.,  
Vice Chancellor-University Advancement

### UC RIVERSIDE FOUNDATION

Website: [www.foundation.ucr.edu](http://www.foundation.ucr.edu)

#### Executive Officers

Chair: Barbara L. Robinson, Newport Beach  
Vice Chair: Open  
Treasurer: Nicholas H. Goldware, Riverside  
Immediate Past Chair: Amy S. Harrison '72, Grand Terrace  
President: William G. Boldt, Vice Chancellor-University Advancement  
Executive Director: Susan Harlow, Associate Vice Chancellor  
Secretary: Judith Lehr, Director-Donor Research & Relations  
Associate Treasurer: Elizabeth Wottring-Gonzales, Director-University  
Advancement Finance & Administration

### UC SAN DIEGO FOUNDATION

Website: [www-er.ucsd.edu/ucsdfoundation](http://www-er.ucsd.edu/ucsdfoundation)

#### Executive Officers

Chair: Ronald R. Taylor, San Diego  
Vice Chair: John D. Cambon, '74, San Diego  
Vice Chair: Elaine Galinson, San Diego  
Treasurer: Arthur Brody, San Diego

#### Operating Officers

Chancellor: Marye Anne Fox  
Interim President: John A. Woods, Interim Vice Chancellor-  
External Relations  
Interim Vice President: Rebecca Newman, Associate Vice Chancellor-  
Development  
Assistant Treasurer: Steven W. Relyea, Vice Chancellor-  
Business Affairs  
Chief Financial Officer: Marlene Shaver, Associate Vice Chancellor-  
Information and Financial Systems for External Relations  
Corporate Secretary: Carrie Banks-Spillane, Board Operations Manager

### UC SAN FRANCISCO FOUNDATION

Website: [www.ucsf.edu/foundation/](http://www.ucsf.edu/foundation/)

#### Executive Officers

Chair: Barbara Bass Bakar, San Francisco  
Vice Chair: William E. Oberndorf, San Francisco  
President: J. Michael Bishop, MD, Chancellor  
Executive Vice President: Bruce W. Spaulding, Vice Chancellor-  
University Advancement & Planning  
Vice President: James Asp, Associate Vice Chancellor-University  
Development & Alumni Relations  
Treasurer: Steve Barclay, Vice Chancellor-Administration & Finance  
Secretary: Michael D. Irwin, Executive Director-Financial Services  
Administration

### UC SANTA BARBARA FOUNDATION

#### Foundation Officers

Chair: Steven C. Mendell '63  
Past Chair: Mark A. Bertelsen '66  
Vice Chair-Finance & Treasurer: Bruce G. Cooper '77  
Vice Chair-Development: Stephen E. Cooper '68  
Vice Chair-Stewardship: Kathryn D. McKee '59  
Secretary: Susan Worster '70  
Executive Director: Gary A. Greinke, Associate Vice Chancellor  
Chief Financial Officer: Eric J. Sonquist, Director-Finance &  
Administration

### UC SANTA CRUZ FOUNDATION

Website: [www.ucsc.edu/administration/ur/foundation/](http://www.ucsc.edu/administration/ur/foundation/)

#### Executive Officers

President: Kenneth A. Feingold '71, Santa Monica  
Vice President: Anuradha Luther Maitra, Saratoga  
Parliamentarian: Timothy J. Morgan '70, Santa Cruz

#### Administrative Officers

Executive Secretary: Ronald P. Suduiko, Vice Chancellor-University  
Relations  
Treasurer: Thomas M. Vani, Vice Chancellor-Business &  
Administrative Services  
Assistant Executive Secretary: Maria Kerschen, Director of Finance &  
Information Systems-University Relations  
Assistant Treasurer: William L. Jump, Controller-University Relations

# PRIVATE SUPPORT

## Glossary

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### **Gift data**

The gift data included in the Annual Report on the University Private Support Program are compiled using the Council for Aid to Education/cash convention for gift reporting (i.e., includes outright gifts, pledge payments, and private grants payments, not contracts). This is the reporting convention used for comparisons with other educational institutions.

### **Regents**

The Board of Regents of the University of California is the corporate body entrusted by the California State Constitution, Article IX, section 9, with the University's organization and administration.

### **Campus foundations**

Campus foundations, serving each of the ten University of California campuses, are independently incorporated as nonprofit, public-benefit corporations. They serve as the primary fundraising arm for their respective campuses. The strength of the foundations rests with the direction provided by their community-based volunteer trustees. Each foundation is staffed by University personnel. A foundation is located on each campus.

## SOURCES OF GIFTS

This category identifies the original source of gifts and grants to The Regents and the campus foundations.

### **INDIVIDUALS**

#### **Alumni**

Alumni are defined as former undergraduate or graduate students, full- or part-time, who have earned some credit toward a degree offered by a particular campus of the University of California.

#### **Individuals (non-alumni)**

All individual donors who are not alumni are covered by this classification, including parents, faculty, staff, and trustees.

### **ORGANIZATIONS**

#### **Campus-related organizations**

This classification covers student groups, alumni associations, and University support groups, but not campus foundations. A gift to a campus foundation is reported in the classification appropriate to the original donor when the gift was received by the campus foundation.

### **Corporations**

This classification covers both for-profit entities and non-profit entities that are funded by for-profit entities.

For-profit entities are defined as corporations, businesses, partnerships, and cooperatives that have been organized for profit-making purposes, including corporations owned by individuals and families, incorporated professional individuals, and other closely-held companies.

Examples of non-profit entities that are funded by for-profit entities include: industry or trade associations; professional, union, or lobbying organizations; and non-profit organizations funded by one or more companies or individuals operating for profit, including corporate foundations.

### **Foundations**

This classification covers private tax-exempt entities established and operated exclusively for charitable purposes; non-profit foundations or charitable trusts, including funds or endowments designated by the Internal Revenue Service as grant-making foundations; community foundations; family foundations; or charitable trusts. This classification excludes corporate foundations, campus foundations and quasi-government entities, such as the National Endowment for the Humanities.

### **Other sources**

This classification covers all non-profit organizations other than those described above, including fundraising consortia, religious organizations, and higher educational associations or institutions.

## PURPOSES OF GIFTS

This category identifies the intended use of private support as designated by the donor or grantor.

### **Research**

This classification applies to private support that is restricted to scientific, technical and humanistic investigation, including salaries and other support of research projects. Funds for research may also be included in the "campus improvement" classification (capital projects to support research) and in the "departmental support" classification (endowed chairs).

### **Student support**

This classification includes support that is restricted to non-repayable financial aid to undergraduate and graduate students, including undergraduate scholarships, graduate fellowships, awards, prizes, and private support for work-study students, as well as gift funds to support loans to be repaid by undergraduate and graduate students.

# PRIVATE SUPPORT

## Glossary

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### **Instruction**

This classification is restricted to support for seminars, conferences, lecture programs, and faculty recognition awards, including salaries, honoraria and employee benefits.

### **Campus improvement**

This classification covers support for capital projects and for ongoing operation of the physical plant, including grounds and buildings, facilities, and equipment. It includes gifts and private grants of real and personal property, including equipment and works of art for use by the University. It also covers gifts and private grants that are restricted by the donor or grantor to purchase buildings, other facilities, equipment, and land for use by the University; to construct or carry out major renovation of buildings and other facilities; and to retire indebtedness. In addition, the classification applies to gifts of library materials and monetary support that is restricted to acquire, restore, and preserve books, periodicals, manuscripts, maps, and related materials; to acquire audiovisual and other equipment; and to support other activities of campus libraries.

### **Departmental support**

This classification covers gifts that are restricted by the donor to a particular academic division, department or entity. It also covers gifts that are restricted by the donor to a particular academic division, department or unit, and further restricted by the donor to a particular purpose for which no other purpose category is listed, including endowed chairs, but excluding support for instruction and student financial support, which are reported in the related classifications.

### **Other purposes**

This classification covers support of non-instructional services beneficial to individuals and groups external to the University (e.g., exhibits, museums, patient care, public service, and similar facilities and programs); and gifts restricted by the donor for endowment, which maintains the principal in perpetuity, but otherwise unrestricted by the donor as to use of the endowment income. It also includes support for intercollegiate athletics. Note that gifts to support athletic scholarships are reported in “student support” and gifts for athletic capital projects are reported in “campus improvement”.

### **Unrestricted**

This classification includes gifts made by the donor for current use without restriction, regardless of any subsequent administrative designation or purpose.

### **TYPE OF ASSETS**

This category identifies the form (type of asset) comprising the support received this year by the University and the campus foundation.

#### **Cash**

This classification covers currency, coins, checks, money orders, credit cards transactions, and bank drafts.

#### **Securities**

This classification includes stocks, bonds, and related instruments, such as promissory (mortgage) notes and insurance policies, if maintained rather than surrendered for cash.

#### **Real property**

This classification applies to real estate, including land, buildings, and other improvements; and to oil, mineral and related rights. Real property is reported at its fair market value.

#### **Non-monetary items**

This classification applies to personal or company property (except securities and real property), including works of art, books, intellectual property, and scientific and other equipment. Non-monetary gifts are reported at their fair market value.

### **PLANNED GIFTS**

A planned gift is often referred to as a “split-interest arrangement”; it involves benefits for the donor (or another non-charitable beneficiary) and for the charitable institution. In such a circumstance, a donor who makes a current gift-in-trust is eligible for an income for life or for a period of years related to the underlying assets of the gift, as well as to certain income-tax benefits for making a charitable contribution. The donor may name himself or herself or another individual as the life-income beneficiary; on the demise of the beneficiary or at the conclusion of the trust term, the charitable remainder is applied to the charitable purpose specified in the gift agreement.

*Face value* is a term that refers to the total amount of a planned gift agreement, i.e., the amount conveyed by gift to establish a split-interest trust or other planned gift.

*Present value* is a term that refers to the discounted value of a planned gift used to predict in today's dollars what the gift will be worth when it becomes available to support the charitable purpose for which it was designated by the donor.



