UND Alumni Association & Foundation

April 2017
Mission and Vision Statements

Vision Statement
- The UND Alumni Association & Foundation fosters connections, inspires generosity, and advances the University of North Dakota.

Mission Statement
- The UND Alumni Association & Foundation supports University of North Dakota students, faculty, alumni and the greater community by providing resources for growth and development.

UND Alumni Association & Foundation separate legal entity from UND.
Governance

- The UND Alumni Association & Foundation has a board of directors, composed primarily of UND alumni who are business and other community leaders.
- Board steers the organization by adopting sound governance and financial policies that ensure the Foundation has adequate and sustainable resources.
- Board is accountable for the mission, vision, and values of our organization.
- The Board, when it meets twice a year, approves strategic plans, our annual operating budget, and our investment strategies.
- Board committees meet at least quarterly are active throughout the year, overseeing investments, finance, audits, alumni relations, and governance. Our Board members are identified on our website.

Day-to-day operations are managed by DeAnna Carlson Zink, CEO of the organization.
UND Foundation Impact

- UND foundation raises funds in excess of $40 million per year to support the university's strategic priorities and manages an endowment of more than $250 million.
- Our most recent comprehensive fundraising campaign engaged over 38,000 unique donors who made gifts exceeding $324 million to advance our school's priorities. Over 16,800 were new donors!
- The annual endowment impact is significant and growing, totaling nearly $8 million for the university this year and more than $33 million in the past 5 years combined.
- Annual support to the University, benefiting students with scholarship and enhanced facilities has been $25 million.
UND Spirit Campaign recap

- July 1, 2005-September 30, 2013
- First extensive all campus campaign
- During North Dakota Spirit | The Campaign for UND, the UND Foundation endowment balance grew from $75 million to **$163 million**, and **430 new endowments** were created. The campaign was supported by **109,646** cumulative yearly donors, **38,808** unique donors, and **16,821** new donors.
- Grew Support to UND
UND Spirit Campaign recap

- Grew pledge base
- Grew revocable gifts
- Grew annual giving
- White papers—tweaked how we were doing business
**Campaign Totals Breakdown**

*As of September 30, 2013*

- **Deferred Gifts** ($17M Irrevocable)
  - $101.4 M
- **Pledges** ($16.7M to Endowment)
  - $50.5 M
- **Gifts Available to Spend**
  - $56 M
  - $21.2 M
  - $95 M
- **UND & Related Foundations**
- **Endowed Gifts (4% payout)**
  - $56 M

**$324 Million Total**
UND Foundation

- **Restricted Funds** – contributions restricted by a donor or grantor for a specific use.
  - Donors want assurance that their donations are used for their intended purpose.
- **Unrestricted Funds** – contributions given without restrictions as to use.

- Gifts that are unrestricted less than 3%

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total June 30, 2016</th>
<th>Total June 30, 2015</th>
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<tbody>
<tr>
<td><strong>REVENUE, GAINS &amp; OTHER SUPPORT</strong></td>
<td></td>
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<td>Contributions</td>
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UND Foundation

- Strategic plan and Future fundraising goals
- Ties to UND’s new strategic plan

- Questions?