

The University of Arizona Foundation Gift Planning Professional Advisory Council

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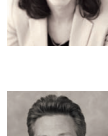
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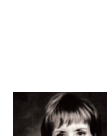
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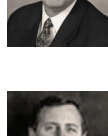
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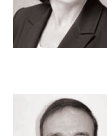
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Facts and Highlights

The University of Arizona Foundation and The University of Arizona



OVERVIEW

- Mission statement: The University of Arizona Foundation secures resources and manages assets and relationships solely to advance The University of Arizona.
- Vision statement: The University of Arizona Foundation will be an exemplary leader among peer institutions and will advance the UA mission through service, integrity and accountability.
- Core values: Accountability, Integrity, Service Excellence, Trust.
- The UAF was incorporated in 1958.
- The UAF employs 60 full-time staff members.
- The UAF manages another 46 professional development staff members who are University employees.

FUNDRAISING

- Twenty-three percent of the University's budget comes from three primary sources: tax dollars, student fees and local funds (investment earnings).
- The remaining 77 percent must come from private gifts and research contracts.
- More than 98 percent of the private dollars raised are designated by donors for specific purposes.
- The UAF manages the University's fundraising process; \$141.3 million was raised in fiscal year 2009.

ASSET MANAGEMENT

- The UAF manages a \$300 million endowment.
- The UAF asset base is \$450 million.
- The UAF maintains approximately 4,000 accounts for 200 different programs.
- The endowment payout rate is 4 percent.
- The UAF serves as trustee for life income agreements.

RELATIONSHIP MANAGEMENT

- The UAF is greatly strengthened by an involved and committed base of donors, alumni, parents, volunteers and other supporters. Through a variety of activities and outreach programs, the UAF makes every effort to stay connected with its many constituents.
- The President's Club, a recognition group for the University's most generous donors, was founded in 1967.

BOARD OF TRUSTEES

- Composed of business and civic leaders from throughout Arizona and the United States, the Board is responsible for the Foundation's policies, procedures and overall direction.
- Trustees' professional expertise and community involvement allow them to offer valuable insights into the Foundation's development efforts.
- In addition to generating and managing private gifts for the University, each year the UAF directs nearly \$200,000 of its assets to the UA in the form of grants and awards.

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