

Private Support Appendices

Appendix I: Private Support to the Regents and Campus Foundations, 1983-84 to 2003-04, using the accrual reporting convention (outright gifts and pledges)

Appendix II: Private Support Total for Gifts and Pledges by Campus

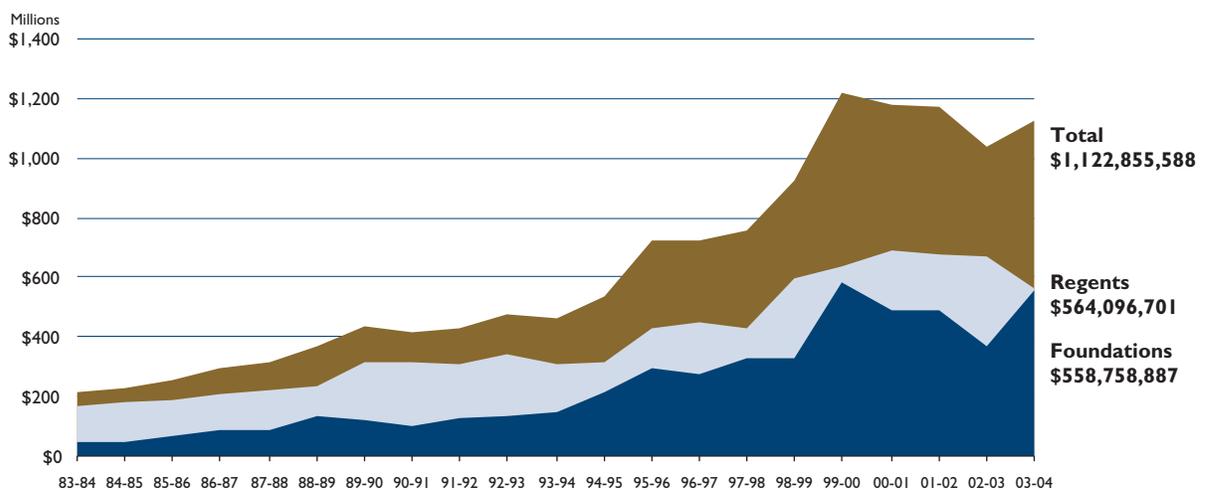
Glossary of Terms used in reports on private support

PRIVATE SUPPORT

Appendix I

Private Support to the Regents and the Campus Foundations 1983-84 to 2003-04

Fiscal Years	Regents	Foundations	Totals
1983-1984	\$168,686,124	\$47,010,365	\$215,696,489
1984-1985	178,479,512	49,133,944	227,613,456
1985-1986	186,253,924	68,757,418	255,011,342
1986-1987	207,593,332	86,031,331	293,624,663
1987-1988	223,256,391	89,903,475	313,159,866
1988-1989	233,701,000	133,156,000	366,857,000
1989-1990	315,323,651	120,750,398	436,074,049
1990-1991	311,795,189	102,919,879	414,715,068
1991-1992	305,503,837	124,544,336	430,048,173
1992-1993	341,073,528	131,279,500	472,353,028
1993-1994	308,864,760	150,391,500	459,256,260
1994-1995	315,773,829	217,079,565	532,853,394
1995-1996	429,052,653	291,949,785	721,002,438
1996-1997	450,199,449	276,118,749	726,318,198
1997-1998	427,768,819	326,731,603	754,500,422
1998-1999	595,840,889	330,229,035	926,069,924
1999-2000	638,217,019	583,950,217	1,222,167,236
2000-2001	691,139,190	487,480,139	1,178,619,329
2001-2002	679,693,623	492,068,053	1,171,761,676
2002-2003	666,555,369	370,758,696	1,037,314,065
2003-2004	\$564,096,701	\$558,758,887	\$1,122,855,588



PRIVATE SUPPORT

Appendix II Totals for Gifts and Pledges

BERKELEY	Regents	Foundation	Total
1994-1995	81,026,533	75,059,341	156,085,874
1995-1996	112,114,655	76,819,873	188,934,528
1996-1997	115,924,899	66,503,031	182,427,930
1997-1998	107,792,918	66,444,170	174,237,088
1998-1999	164,095,171	57,605,864	221,701,035
1999-2000	136,624,495	64,737,343	201,361,838
2000-2001	241,235,905	74,086,442	315,322,347
2001-2002	176,768,164	63,649,236	240,417,400
2002-2003	112,742,177	51,113,057	163,855,234
2003-2004	101,424,466	72,764,015	174,188,481

DAVIS	Regents	Foundation	Total
1994-1995	30,888,864	10,624,937	41,513,801
1995-1996	51,485,649	7,946,743	59,432,392
1996-1997	35,327,053	8,815,495	44,142,548
1997-1998	36,912,732	15,191,582	52,104,314
1998-1999	53,912,431	9,749,898	63,662,329
1999-2000	55,850,099	16,380,453	72,230,552
2000-2001	58,661,631	18,690,926	77,352,557
2001-2002	56,779,883	53,235,548	110,015,431
2002-2003	52,005,765	19,704,722	71,710,487
2003-2004	55,020,595	18,385,457	73,406,052

IRVINE	Regents	Foundation	Total
1994-1995	13,517,932	8,131,772	21,649,704
1995-1996	12,400,546	13,206,160	25,606,706
1996-1997	14,205,593	15,980,561	30,186,154
1997-1998	12,502,888	26,332,212	38,835,100
1998-1999	27,359,702	22,185,857	49,545,559
1999-2000	23,530,837	64,354,184	87,885,021
2000-2001	19,889,875	32,150,903	52,040,805
2001-2002	15,735,989	19,890,374	35,626,363
2002-2003	31,092,582	26,218,625	57,311,207
2003-2004	24,224,419	42,122,309	66,346,728

LOS ANGELES	Regents	Foundation	Total
1994-1995	55,188,744	54,916,233	110,104,977
1995-1996	69,670,752	121,086,027	190,756,779
1996-1997	134,906,270	96,891,237	231,797,506
1997-1998	98,955,078	108,111,736	207,066,814
1998-1999	116,602,554	137,853,869	254,456,423
1999-2000	90,385,117	240,415,961	330,801,078
2000-2001	160,993,230	121,937,425	282,930,655
2001-2002	148,981,153	210,483,379	359,464,532
2002-2003	176,848,905	111,256,680	288,105,585
2003-2004	116,257,301	161,766,203	278,023,504

MERCED	Regents	Foundation	Total
1994-1995	n/a	n/a	n/a
1995-1996	n/a	n/a	n/a
1996-1997	n/a	n/a	n/a
1997-1998	n/a	n/a	n/a
1998-1999	10,000	n/a	10,000
1999-2000	1,592,153	n/a	1,592,153
2000-2001	5,038,993	n/a	5,038,993
2001-2002	22,234,843	n/a	22,234,843
2002-2003	3,457,791	159,979	3,617,770
2003-2004	2,830,048	1,780,394	4,610,442

RIVERSIDE	Regents	Foundation	Total
1994-1995	7,094,318	15,421,871	22,516,189
1995-1996	22,596,975	2,078,716	24,675,691
1996-1997	17,710,848	9,688,798	27,399,646
1997-1998	6,793,537	14,954,880	21,748,417
1998-1999	4,506,572	2,855,403	7,361,975
1999-2000	10,693,862	6,404,166	17,098,028
2000-2001	13,076,803	4,928,570	18,005,373
2001-2002	23,224,822	8,371,304	31,596,126
2002-2003	12,768,652	6,759,442	19,528,095
2003-2004	7,271,615	4,191,371	11,462,986

SAN DIEGO	Regents	Foundation	Total
1994-1995	39,819,272	12,911,301	52,730,573
1995-1996	54,475,569	34,322,666	88,798,235
1996-1997	40,956,531	17,178,541	58,135,072
1997-1998	45,243,617	32,188,946	77,432,563
1998-1999	80,848,581	35,481,507	116,330,088
1999-2000	73,975,115	61,392,612	135,367,727
2000-2001	46,387,460	75,510,302	121,897,762
2001-2002	54,775,888	45,595,640	100,371,528
2003-2004	60,254,688	70,848,176	131,102,864
2003-2004	53,292,522	78,671,421	131,963,943

SAN FRANCISCO	Regents	Foundation	Total
1994-1995	70,031,638	31,901,964	101,933,602
1995-1996	82,304,726	28,613,163	110,917,889
1996-1997	66,478,618	49,836,904	116,315,523
1997-1998	78,970,156	46,097,928	125,068,083
1998-1999	107,589,767	53,556,880	161,146,647
1999-2000	200,941,595	114,606,068	315,547,664
2000-2001	110,735,877	129,218,433	239,954,310
2001-2002	137,325,038	67,742,611	205,067,649
2002-2003	140,128,377	70,810,323	310,738,700
2003-2004	94,734,906	158,968,180	253,703,086

SANTA BARBARA	Regents	Foundation	Total
1994-1995	7,244,108	3,698,127	10,942,235
1995-1996	12,660,501	4,741,977	17,402,478
1996-1997	11,904,008	5,738,385	17,642,394
1997-1998	25,188,127	4,639,958	29,828,085
1998-1999	14,410,864	5,382,366	19,793,230
1999-2000	20,439,663	10,124,817	30,564,479
2000-2001	21,175,104	26,855,494	48,030,597
2001-2002	32,358,053	19,004,239	51,362,292
2002-2003	41,219,791	9,168,000	50,387,791
2003-2004	65,113,015	15,052,085	80,165,100

SANTA CRUZ	Regents	Foundation	Total
1994-1995	4,823,654	4,414,019	9,237,673
1995-1996	2,961,648	3,134,460	6,096,108
1996-1997	8,010,621	5,485,798	13,496,419
1997-1998	5,187,371	12,770,191	17,957,562
1998-1999	12,910,490	5,557,391	18,467,881
1999-2000	18,796,177	5,534,613	24,330,790
2000-2001	9,401,848	4,101,617	13,503,465
2001-2002	8,963,246	4,095,722	13,058,968
2002-2003	17,740,713	4,919,692	22,660,405
2003-2004	27,197,183	5,057,452	32,254,635

Note: UC Davis totals include certain gifts and private grants made to the Systemwide Division of Agriculture and Natural Resources.

PRIVATE SUPPORT

Glossary

Gift data

The gift data included in the Annual Report on the University Private Support Program are compiled using the UC system convention for gift reporting (i.e., includes pledges when made, not paid; outright gifts and private grants, not contracts; and gifts from foreign sources).

Regents

The Board of Regents of the University of California is the corporate body entrusted by the enabling legislation with the University's organization and administration.

Campus foundations

Campus foundations, originally established at the Los Angeles campus in 1945 and the Berkeley campus in 1948 as alumni foundations to secure private support for student aid, are independently incorporated as non-profit, 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. They are 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 transfer to The Regents from 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 (which are classified as for-profit entities), campus foundations or 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 institutions or associations.

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.

Student support

This classification includes support that is restricted to non-repayable financial aid to undergraduate or graduate students, including scholarships, 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

Instruction

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

Campus improvement

This classification includes support for ongoing operation of the physical plant, including its buildings and grounds, other facilities, and equipment. It also 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; or to construct or carry out major renovation of buildings and other facilities; or to retire indebtedness. In addition, the classification applies to gifts of library materials and monetary support that are restricted to acquire, restore, and preserve books, periodicals, manuscripts, maps, and related materials; to acquire audiovisual and other equipment; or 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, but otherwise unrestricted. 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. In addition, it covers gifts and grants that have been given for support of agricultural research and public service, which the Berkeley, Davis and Riverside campuses and the system-wide office break out separately, but excludes instruction and student financial aid.

Agriculture support

This classification is used by the Berkeley, Davis and Riverside campuses and the Office of the President only. It covers gifts and grants that have been given for support of agriculture research and public service, but excludes instruction and student financial aid.

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.

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) of a gift at the time it is transferred to the University or the campus foundation.

Cash

This classification covers currency, coins, checks, money orders, 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.

Pledge

This classification applies to the promise to make a gift or private grant, the amount of the gift or grant to be paid within five years by the donor, usually in installments.

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.