

*Stability*  
IN TIMES OF CHANGE

**2010 Annual Report**  
The University of Toledo Foundation



## Friends, donors and alumni,

In November, your University of Toledo was mentioned in the nation's premier newspaper covering higher education as an up-and-coming institution. The story, in the Chronicle of Higher Education, highlighted about a dozen universities with surging reputations and offered views on how such reputation growth is accomplished.

There are important things happening at UT, but that reputation comes from you. As I travel the nation and meet with groups of alumni and University supporters, I am always amazed at the positions of leadership and accomplishments of those with a University of Toledo affiliation. Even during these tough economic times, UT graduates are sought out by organizations that have come to trust in the education this institution provides.

It is you who have built and grown the stature of your University of Toledo.

Still, we face difficult times ahead. While the economy is slowly recovering, the state of Ohio's budget forecasts look to be extremely challenging. Federal stimulus dollars that helped mitigate UT budget cuts during the last two years will not exist as the state plans a new two-year budget.

But as the Chronicle story emphasizes, UT has been preparing. We have worked hard to make the institution's business operations more efficient and to move resources to the academic interface between students and professors. We're engaged in an academic reorganization that elevates the arts, social sciences and humanities, focuses resources on areas of excellence such as renewable energy and biomarkers and adopts innovative learning methodologies.

Across the nation we're seeing the silver linings of difficult economic times. While economic resources are scarce, generosity of spirit and volunteerism are on the rise. I encourage you to continue to support your University of Toledo in any way you can.

Your excellence in your place of employment, your leadership in your community and your donation as your circumstances allow all radiate the value of a University on the move.

Sincerely,



Lloyd A. Jacobs  
President  
University of Toledo



Lloyd A. Jacobs

## Letter from UT Foundation President and Board Chair

Dear Friends,

The greatest indicator of an organization's enduring success may be its capacity to adapt to change. Whether the change is prompted by technological, financial or societal factors, the ability to adapt paves the way for progress.

For the UT Foundation, these ongoing efforts to evolve and prosper include evaluating financial and investment policies, implementing cost-savings steps and exploring new revenue-producing avenues to benefit the University we support.

This past year, the UT Foundation undertook several efforts to maintain our long-standing tradition of success. Even amidst a continued economic downturn, we've positioned our organization to further UT's achievements in the areas of education, research, healthcare and economic development. Among the steps we took in 2010 were:

- Refining our endowment and spending policies, to maximize the funds we manage
- Implementing an online honor roll and electronic mailings, endeavors to "go green" and reduce operational costs
- Pursuing a variety of business development alternatives, to benefit not just UT but the entire Toledo community

While our policies and decisions contribute to our success, we look to our partnership with UT's faculty, staff and administration for guidance in determining priorities and needs. Likewise, our partnership with the community shapes our real estate and business development decisions. And our partnership with supporters and benefactors provides the necessary resources to make these goals realities.

Whatever success the University and the UT Foundation achieve together can be attributed greatly to the part you play. What we've accomplished together in this one year will impact those the University directly serves—as well as the world beyond—for years to come.

On behalf of the University community, we thank you.

Sincerely,



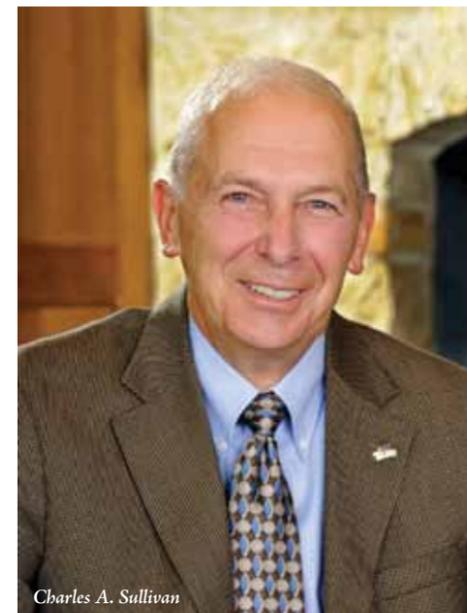
Brenda S. Lee  
President  
The University of Toledo Foundation



Charles A. Sullivan  
2009-2010 Chair  
The University of Toledo Foundation  
Board of Trustees



Brenda S. Lee



Charles A. Sullivan

## Restructuring Positions UT as Transformative Leader

The formal vision statement of The University of Toledo states that UT is and should be “a transformative force for the world.”

UT President Lloyd Jacobs believes his own vision for the University aligns well with that statement. “In the 21st century, a new role is being asked of universities: not only to educate but to innovate, to set the bar for healthcare quality, and to make the place where we find ourselves a place in which it is pleasant to live,” said Dr. Jacobs. “The University of Toledo is and will be a leader in this societal transformation.”

This leadership role will require significant change within the institution, including organizational restructuring, he noted. Consequently, UT’s Board of Trustees recently approved a revised structure for the University’s colleges, departments and schools. The goal is to create and capitalize on “synergies” which more effectively serve the UT community.

Two areas that already share existing synergies are the Judith Herb College of Education and the College of Health Science and Human Service. Merged into one, as the “Judith Herb College of Education, Health Science and Human Service,” the new college’s services and common purposes will be strengthened and enhanced.

Three new colleges will be created from the disciplines currently existing in the College of Arts and Sciences:

- The College of Visual and Performing Arts
- The College of Languages, Literature and Social Sciences
- The College of Natural Sciences and Mathematics

The new arrangement will provide smaller units a greater “voice” within the University; will increase

accessibility by students, parents and other stakeholders; and will strengthen content expertise in leadership. “A scientist will be dean in science, an artist in the arts and a linguist, perhaps, in language, literature and social science,” explained Dr. Jacobs. “This strengthening of leadership will enhance these disciplines.”

In addition, the new College of Innovative Learning will maximize the benefits of new technologies and “energize the creativity of the entire institution,” Dr. Jacobs said.

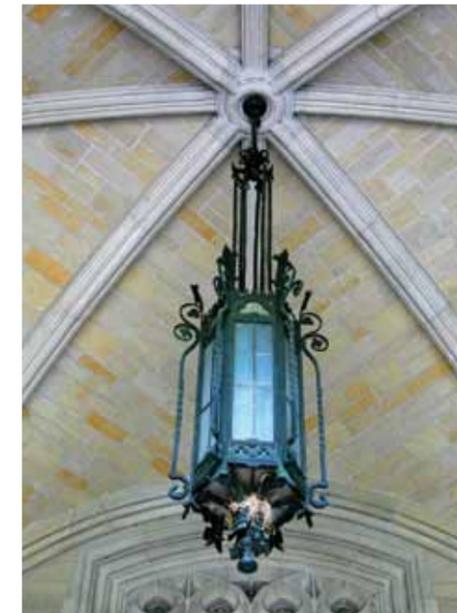
Promoting interdisciplinarity and creativity through the development of several individual “schools” is another central strategy in the transformational plan. The concept of schools, which are cross-disciplinary units that may exist within a single college or across two or more colleges, is not new at UT, noted Dr. Jacobs. The School of Solar and Advanced Renewable Energy was created two years ago, and the Edward Schmidt School of Professional Sales has existed for nearly a decade.

As the reorganization unfolds, many decisions await the University. These include studying the more than 100 departments for additional partnerships and redundancies, as well as determining leadership for the newly organized entities.

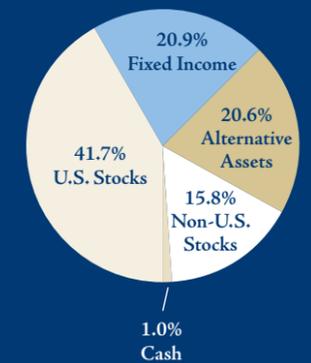
“This organization will, we believe, enhance the University’s communication, synergy and student centeredness,” Dr. Jacobs said. Input and participation by all stakeholders—students, faculty, staff and alumni—will play a key part in the plan’s success. “We hope everyone will help redesign our beloved institution for a great future.”

**\$171.8 Million**  
Total UTF Assets

June 30, 2010



### Asset Allocation

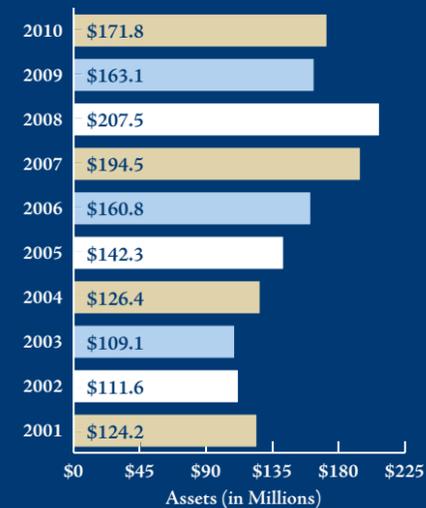


*“What you leave behind is not what is engrained in stone monuments, but what is woven into the lives of others.”*

– Pericles



### Assets 2001-2010



**\$162 Million**  
Endowment

June 30, 2010

## Fetterman Training Center Enhances Athletics Experience for UT Players and Community



For much of The University of Toledo community, UT serves as more than a resource for excellent academics. UT's athletic program offers outstanding entertainment for spectators and fans, and equips its student-athletes with lifelong skills, conditioning and community engagement.

The new Fetterman Training Center, completed in early 2010, marked the culmination of a building campaign that also included the renovation of Savage Arena and the construction of the Sullivan Athletic Complex in 2009.

Supported through a \$1 million gift from Hal and Susan Fetterman, the 90,400-square-foot practice facility is used by all of UT's 16 varsity sports, as well as the University's intramural and club sports. The facility includes a 100-yard FieldTurf playing surface, a regulation basketball/volleyball court, sprinting lanes and a long jump pit for track, a golf practice area and new golf locker rooms. As part of the project, improvements were also made to the adjacent outdoor track, including new permanent bleacher seating, a press box and elevated viewing platforms.

UT Head Football Coach Tim Beckman, speaking at the dedication ceremony on behalf of the coaches, said the new facility will have a tremendous impact on all UT's athletic programs. "When we bring our recruits into this building, it tells them that this university is committed to our athletics programs and has a vision for excellence."

## New Autism Center Creating Environment for Success

Professionals in the field of autism expect a million and a half children with autism spectrum disorders (ASD) growing to adulthood within the next decade. Preparing to meet the needs of that currently underserved community is the impetus for UT's first coordinated autism program, the UT Center for Excellence in Autism. The program is part of the department of pediatrics, and has also joined forces with ProMedica Health Systems and other member agencies of The Autism Collaborative to create a network of services for individuals with ASD and their families in the northwest Ohio region.

Sherry Moyer, director of the UT Center for Excellence in Autism, said the primary focus is building a network of services, focusing on the entire lifespan. The center's services, research and advocacy programs will augment and enhance existing resources, such as those offered by the

Autism Society of Northwest Ohio. The goal is to create an environment for success, she said, with every person living with autism able to access support and develop lifelong skills.

Especially exciting, she noted, is the potential for research synergies among the areas of education, occupational therapy, medicine, psychiatry, biology, pharmacology, social work and physical therapy.

Ten years down the line, she sees the Center as being a medical destination: "When people around the country think of the lifespan of autism and the need for successful navigation of resources, I want them to think, 'Oh yeah—we've got to talk to UT.'"

To make a gift in support of the Center, contact Jennifer Schaefer at [Jennifer.schaefer@utoledo.edu](mailto:Jennifer.schaefer@utoledo.edu) or 419.530.2408.



## LaValley Rooftop Garden Provides Nature Oasis Amidst Technology

The College of Business and Innovation's new Savage and Associates Complex for Business Learning and Engagement is the most technologically advanced building on UT's campus. The four-story center, connected to Stranahan Hall by a glass walkway, includes data ports for every seat in its ten classrooms, "Smart boards" rather than chalkboards, and touch panels for additional visual and electronic aids.

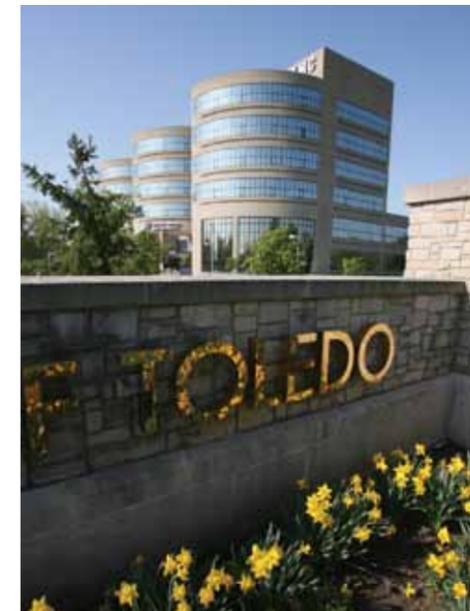
Yet on top of the cutting-edge building sits a nature oasis—rooftop plantings and built-in white benches and tables, along with a wonderful view.

The LaValley Rooftop Garden, funded through a \$250,000 gift from the LaValley family, not only serves as a tranquil setting for studying, but also emphasizes the "green" principals which guided the building's design and construction. Those included energy-efficient use of glass and recycled construction materials

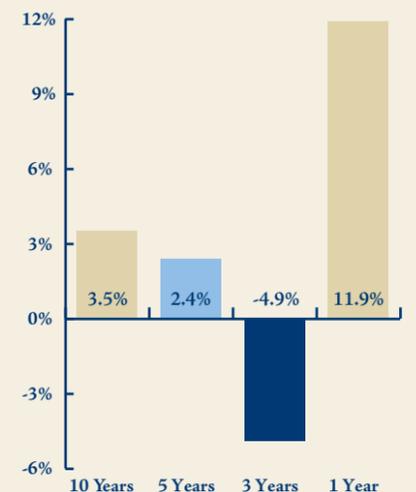
"The College of Business and Innovation is committed to green business principals," said Dean Thomas Gutteridge. "As such, we are proud of the green initiatives given to our new addition to our business college." "The LaValley Rooftop Garden provides an excellent space for our learners to study, relax and enjoy the outdoor environment, while being environmentally responsible."

**\$174.4 Million**  
Investments Under  
Management

June 30, 2010



## Annualized Investment Performance - June 30, 2010



## Dorr Street Gateway to Open in 2012

An organization's most significant changes are often intangible ones. However, a project soon to be underway at the corner of Dorr Street and Secor Road has the potential to not only transform The University of Toledo's physical campus, but also serve as a catalyst in the renaissance of a commercial corridor and its adjacent neighborhood.

Long envisioned by students, faculty and staff, the Gateway project is now poised to "enhance the University experience, as well as attract people from the community to campus," according to Matt Schroeder, UT Foundation vice president for real estate and business development. This project represents a crucial first step in a larger, community-embraced revitalization effort to strengthen neighborhoods, sustain bustling business districts, promote a safe and walkable environment, and create an aesthetically pleasing area through quality architecture and appealing streetscapes.

Taking a multi-phased development approach, Phase One will be an integrated mixed use development that will create a "campus town" environment where students, faculty and neighbors can live, learn and interact, Mr. Schroeder said.

As Phase One becomes a reality, planning for future additions, as well as initiatives all along Dorr Street will remain ongoing. "We've taken a multi-pronged approach to a community-based initiative," Mr. Schroeder said. "Rather than

simply focusing on a modest retail development, we've studied all facets and considerations." As part of the UT Foundation Real Estate Corporation's overall strategy of community partnership, the goal is to develop the area in a way which will not only benefit UT but also the community.

Toledo councilwoman Wilma Brown said the project "symbolizes a unity of purpose" between the University and neighboring community groups. She said the relationship between the University and members of the Secor Gardens community has flourished in recent years, partly due to UT allowing residents and stakeholders' input into development decisions. "It's a big financial commitment by the University to make this a community, not just a place for learning," she explained.

Plans for the Corridor are guided by multiple studies and countless meetings with stakeholders, including students. The current progress is the result of continuing efforts by the University, the City of Toledo, community development corporations, neighborhood associations, businesses and others.

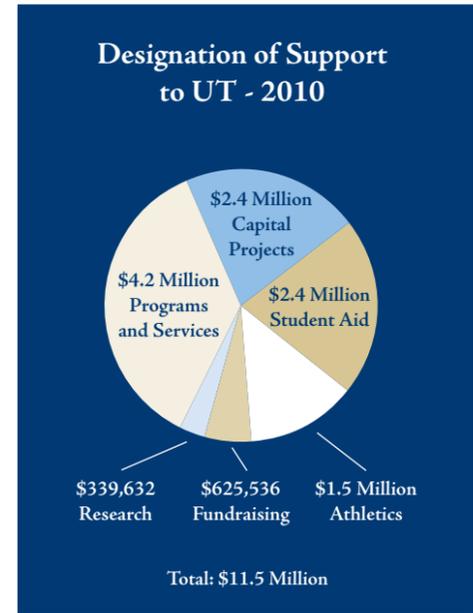
While this initiative is a huge undertaking, Mr. Schroeder noted it is also a financial investment, with the expectation of a traditional market rate return. "More important," he said, "it will assist with recruitment and retention, while transforming an area into a diverse and culturally rich destination."



A new Taco Bell on Dorr Street, relocated from the Dorr and Secor intersection, is one of the first visible steps of the Gateway transformation.

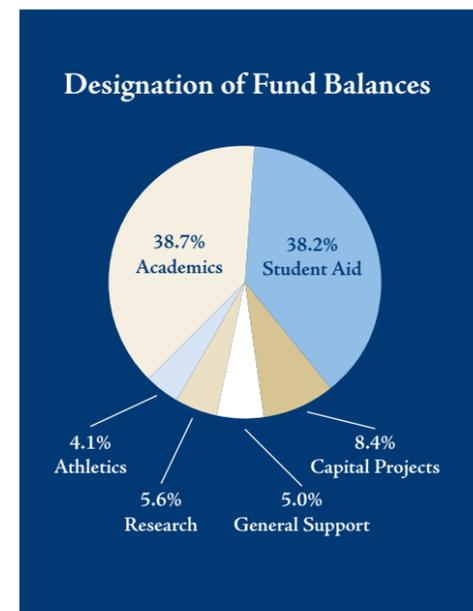
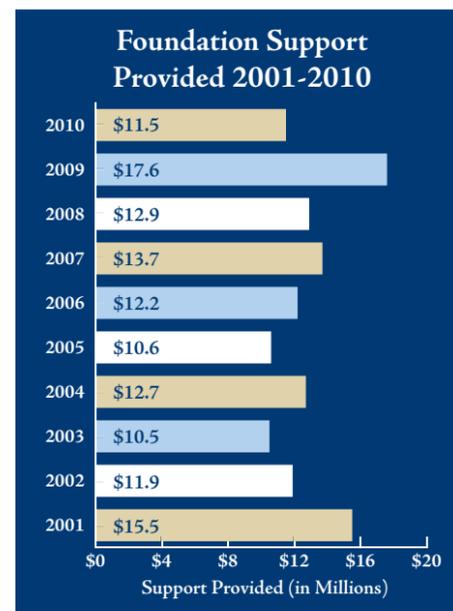
## \$11.5 Million Total Support Provided to the University

July 1, 2009-June 30, 2010



*"The real distinction is between those who adapt their purposes to reality and those who seek to mold reality in the light of their purposes."*

— Henry Kissinger



## Ways to Give

Your support of The University of Toledo remains more important than ever as we work together to make UT a university of distinction.

### Unrestricted Gifts

Unrestricted gifts, given with no specified purpose, allow UT flexibility to fund special opportunities and meet emergency needs, as determined by the University.

### Designated Gifts

Donors may designate gifts for a specific use, such as scholarships, and for a particular college, department or program.

### Outright Gifts And Pledges

**Cash:** Cash is the simplest, most direct and most popular type of charitable gift.

Online gifts can be made with a credit card at our secure website: [utfoundation.org](http://utfoundation.org).

Checks should be made payable to the University of Toledo Foundation and mailed to:

*The University of Toledo Foundation*  
P. O. Box 586  
Toledo, OH 43697-0586

**Pledges:** Donors may make pledge commitments payable over several years.

**Securities:** When making gifts of appreciated securities, you avoid capital gains tax on the appreciated portion. To learn how stocks, mutual funds and bonds can be transferred to the UT Foundation, call 419.530.7730.

**Closely Held Stock in Business or Partnership Initiatives:** Gifting this appreciated property can reduce capital gains taxes while generating charitable income tax deductions.

**Real Estate:** Gifts of real estate include personal residence, farm and commercial property. Such gifts will be recognized at fair market value as determined by a qualified appraisal, and you avoid capital gains tax on the appreciated portion.

**Matching Gifts:** Corporate matches count toward a donor's total giving and may significantly increase the gift's value.

### Planned Gifts

Planned gifts allow donors to make a significant gift to benefit UT in the future, typically at the donor's or beneficiary's death.

Planned gifts may offer donors tax advantages and financial benefits, such as providing current income tax deductions, removing assets from your estate, and producing income. Donors should consult with their own advisers as to specific tax consequences.

**Bequests:** Bequest provisions in a donor's will may provide for a specific amount, percentage or residue of the estate.

**Life Insurance Policies:** Donors may either donate a paid-up policy or designate the UT Foundation as policy owner and beneficiary while continuing to make an annual gift of the premium amount to the Foundation.

**IRA and Other Retirement Plans:** By naming the Foundation as the beneficiary, estate and income taxes are completely avoided on these assets. The donor can designate other, more tax-efficient, assets for children.

**Gift Annuities and Remainder Trusts:** Each provides income to the donor or other beneficiary, while providing a charitable gift to UT.

We can help you connect your goals with effective giving options. For more information:

- Call the UT Office of Institutional Advancement at 419.530.2603 or toll-free at 1.866.848.0002
- Visit the following Web sites:  
[utfoundation.org](http://utfoundation.org)  
[utdevelopment.utoledo.edu/giving](http://utdevelopment.utoledo.edu/giving)

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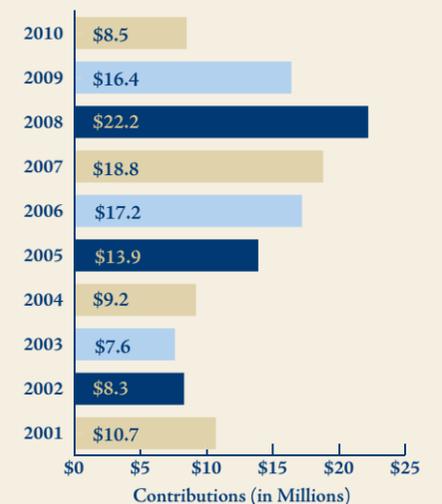
Walter "Chip" Carstensen  
President, Block Communications

**\$8.5 Million**  
Total Contributions

July 1, 2009-June 30, 2010



### Contributions 2001-2010





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OF TOLEDO  
FOUNDATION

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2801 W. Bancroft St.  
Toledo, OH 43606  
419.530.7730

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this publication online, visit [www.utfoundation.org](http://www.utfoundation.org)