A Message from the Chancellor and the Chair

In 2012-13, UCLA set a new fundraising record. Friends, alumni, faculty, staff and students contributed more than $512 million in support of the university’s mission of teaching, research and service. This total included $130 million in student support, $217 million in research funding, $93 million in discretionary support and $33 million in faculty support.

How does an achievement of this magnitude improve a university already renowned for unimagined diversity, unmatched breadth and excellence, and worldwide impact? It propels new creativity and discoveries that create jobs and revitalize our economy. It accelerates our progress in solving the grand challenges of our time, from developing renewable energy alternatives to understanding the human brain. It brings UCLA a significant step closer to achieving a new financial model based on increased self-reliance.

Our burgeoning culture of philanthropy is empowering students and faculty all across campus. We see it in the future physician who, saved from crushing loan debt by a full scholarship, is free to study the medical specialty of her choosing. We observe it in the team of scientists and physicians working hand in hand with the U.S. military to address the unique and complex issues of combat medicine. We see it in the emergence of a new, cross-disciplinary field of study dedicated to contemporary issues facing megacities such as Los Angeles, Mexico City and Tokyo. At UCLA, gifts of every size unlock limitless potential.

Even greater accomplishments lie ahead—tougher problems solved, better technologies developed, more lives enriched. The university prepares to embark upon The Centennial Campaign for UCLA stronger than ever, thanks to the generosity and imagination of donors like you. You allow us to be optimists in the truest sense. Together, we’ll continue to redefine what’s possible.

Gene D. Block
Chancellor, UCLA

Steven L. Klosterman ’74
Chair, The UCLA Foundation
Campuswide Impact

The impact of donors at UCLA reaches every corner of our campus. From new humanities scholarships to investments to help protect our environment to an archive preserving the legacy of an American trailblazer, the philanthropy of our supporters has created phenomenal momentum to carry us into The Centennial Campaign for UCLA. With extraordinary gratitude, we share with you a few of the myriad ways our students and faculty are empowered to change the world.

Justice Joan Dempsey Klein LL.B. ’54 and Conrad Lee Klein
UCLA School of Law
Advocates of gender equality got an enormous boost from alumna Joan Dempsey Klein, presiding justice of the California Court of Appeal, Second Appellate District, Division Three, in Los Angeles (and the first female presiding justice in the state of California) and her husband, Conrad Lee Klein. Their gift to create the Justice Joan Dempsey Klein Scholarships in Law will provide critical support to law students with financial need who demonstrate academic excellence, leadership qualities and a strong commitment to promoting the advancement of women in law and society.

David Geffen
David Geffen School of Medicine at UCLA
Imagine pursuing an advanced degree only to have your career choices restricted by the debt you know you will accrue by graduation. Now imagine that debt being lifted with a scholarship that covers 100 percent of your educational expenses, including tuition, room and board, and books and supplies. The transformative David Geffen Medical Scholarship Fund, conceived by David Geffen, the largest individual donor to any single UC campus, will cover the full cost of a four-year UCLA medical education for up to 33 medical students in each class and more than 300 students over the next decade. The gift will allow these future physicians and scientists — the university’s very best—to pursue careers in clinical practice, teaching, research and public service without economic burden.

Anthony and Jeanne Pritzker
Targeting Three Societal Challenges
A $20 million gift from the Anthony and Jeanne Pritzker Family Foundation takes aim at three great challenges facing society today. A $15 million endowment to UCLA’s Institute of the Environment and Sustainability will advance research on creating a more sustainable world by supporting faculty chairs, creating a center for urban sustainability and funding a prize to advance new sustainability technologies and initiatives. A $2 million gift to the Hammer Museum will expand vitally needed arts programs for children and families. And $3 million will address the unique challenges of UCLA students who have been or are currently in foster care, helping ensure their success. Together, these gifts demonstrate the Pritzkers’ commitment to significantly enhance the university’s goal of bettering our global society.
Professors Anne and Ronald Mellor  
UCLA Departments of English and History  
Recognizing the broad-ranging needs of the programs in which they teach, UCLA Humanities and Social Sciences professors created the Anne Mellor Endowed Graduate Student Fellowship in the English department and the Ronald Mellor Endowed Graduate Student Fellowship in the History department. Complementing these endowments to attract and retain the best in each discipline, the Ronald and Anne Mellor Endowed Educational Fund will support visiting lecturers, student summer travel awards and library resources—unlocking limitless potential among some of the world’s top English and History scholars.

Stanley Lau ’49  
UCLA Asian American Studies Center  
Bañuelos Family Trust  
UCLA Chicano Studies Research Center  
A deeper understanding of our nation’s multifaceted cultural heritage is essential to promoting civic engagement, and two important gifts this year support UCLA’s leadership in this critical area of scholarship. The first, from UCLA alumnus Stanley Lau to create the Stanley Kwok Lau and Dora Wong Lau Endowment for Chinese American Studies, will invigorate student-based research into the history of Chinese Americans in the Los Angeles area. The second gift, from the Bañuelos Family Trust, will establish The Romana Acosta Bañuelos Collection, a permanent archive of the personal papers and oral history interviews of the 34th Treasurer of the United States— and the first Latina to hold the position. The gift will also provide for the writing and publication of a biography of Bañuelos, a public exhibition celebrating her life and a graduate fellowship in her honor.
Financial Report | Performance Highlights

The UCLA Foundation’s support to the campus remains strong, and investment returns were superb for the fiscal year on both an absolute and relative basis. The campus experienced an increase in both payout and grants from The Foundation, while The Foundation’s net position has increased by 13% ($221 million), to $2 billion. Total assets increased by 12% ($2.2 billion), and total liabilities increased by 9% ($251 million) as of June 30, 2013.

The financial statements reflect $185.5 million of non-operating income from positive investment returns.
Financial Report | Endowed Investment Pool Asset Mix

The UCLA Foundation’s endowed investment pool totaled $1.53 billion as of June 30, 2013. The endowed long-term pool is invested in a diversified investment portfolio designed to maximize long-term returns at prudent levels of risk, consistent with accepted institutional investing principles and practices. The pool is diversified by asset class, sector and geography, and has been constructed to achieve a return objective sufficient to cover annual payout, inflation and costs over the long term.

- **Equity**: 46.9%
- **Multi-Strategy**: 12.7%
- **Private Equity/Venture**: 15.9%
- **Credit**: 8.9%
- **Real Assets**: 7.8%
- **Real Estate**: 4.2%
- **Cash**: 3.6%
Financial Report | Endowed Investment Pool

In fiscal year 2012-2013, The UCLA Foundation’s endowed pool experienced strong returns as the financial markets extended gains. The endowed pool returned 15.2% for the fiscal year ended June 30, 2013.

Fiscal Year Ended June 30, 2013

*Median data is for Colleges and Universities with greater than $1 Billion AUM, provided by Cambridge on 9/11/13.
Financial Report | UCLA Gift History

Private support topped $512 million, representing gifts and pledges committed to UCLA from just under 58,000 donors during fiscal year 2012-2013. This barrier-breaking achievement topped last year’s total by 25 percent and reset the fundraising high of $509 million previously reached in 2002. UCLA is consistently ranked among the top 10 nationally in higher education fundraising.
Financial Report | Endowed Investment Pool Payout

The UCLA Foundation has more than doubled its payout over the last 10 years as a result of increasing levels of donor support and prudent investment management. The Foundation has been able to meet its objective of providing a stable source of funding to the campus. The payout rate was 5.25% for the fiscal year ended June 30, 2013.

Fiscal Year Ended June 30, 2013
Financial Report | UCLA Foundation Net Position

The UCLA Foundation’s net position (total assets exceeding total liabilities) reached $2 billion, an increase of 13%. These funds support UCLA’s mission and address campus priorities. Over the past 10 years The Foundation’s net position has grown by 133%.
About The UCLA Foundation

The UCLA Foundation is grateful for the generous support of tens of thousands of donors who play a vital role in maintaining UCLA’s excellence as a public research university. Their gifts provide extraordinary faculty, high-achieving students and innovative researchers with the transformative resources they need to impact the university and the world.

The UCLA Foundation provides donors with resources to help fulfill their philanthropic visions. Governed by a Board of Directors led by donor-volunteers, The Foundation provides fiduciary oversight of the investment of assets managed to benefit the university. The Foundation receives contributions from UCLA’s donor community of alumni, friends, private foundations and corporations, faculty, staff and students. It invests and manages resources to maximize long-term returns, and support current and future generations of scholars and leaders. The Foundation determines the annual payout and disburses these funds to beneficiaries.

The UCLA Foundation is proud to play a role in advancing the campus mission of teaching, research and service. UCLA’s donors are more than philanthropists; they are advocates for excellence. Their confidence in UCLA fuels the optimism of our campus today and the leadership of Bruins tomorrow.

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