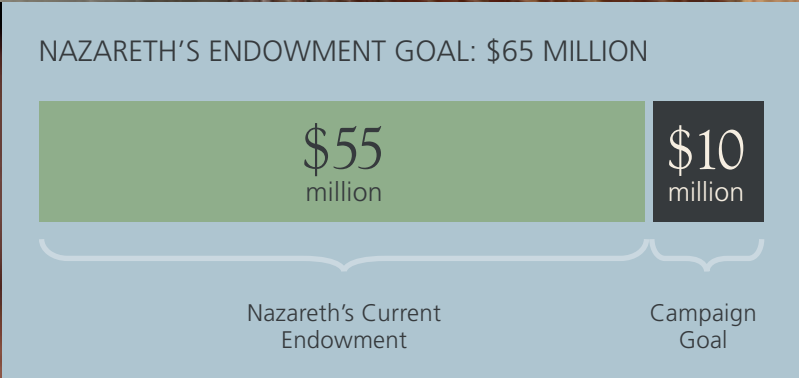


endowment
& scholarships

Nazareth
COLLEGE | Campaign for
College & Community



advance

a robust endowment.

“We must keep Nazareth healthy, moving forward, supporting students, and supporting the community,” says James Sessler, a member of the Nazareth board and chair of its investment committee. “In the business world, you get better or you get worse—you never stay the same. I see a growing endowment as a resource that will help make us better in everything we do.” Nazareth’s endowment generates money for scholarships, faculty chairs, programs, and technology as well as other critical resources. Funds from the endowment are also vital because they reduce dependence on tuition and thus create a more financially sound institution. The continued excellence of Nazareth College rests on a level of financial support that can only be gained through a robust endowment. As it grows, so can we—in all the right ways.

THE COMMUNITY The endowment underwrites scholarships for a significant proportion of Nazareth students who will go on to make a contribution in the greater Rochester community and beyond—teachers, physical therapists, nurses, and social workers who are critical to our society.

OUR PROMISE TO DONORS Nazareth goes to great lengths to ensure that all gifts are used for the intended purposes of the giver. Your gift can be restricted to a particular purpose or used to meet the greatest needs of the College.



\$25,000 minimum gift to endow a scholarship



expand

student opportunities.

“People who give scholarship money don’t always realize what a difference they make,” says Michele Shirtz, a mother of three who received an endowed Thiem Nursing Scholarship. “Being here has opened up such a great door of opportunity for me.” Through the endowment, Nazareth can leverage its resources, attract exceptional students, and turn out graduates with a solid knowledge base and an expanded consciousness. Increased scholarship funding would enable the College to expand access to a Nazareth education by providing both need-based and merit-based aid. An enriched endowment also helps to fund additional graduate assistantships, enabling Nazareth to attract outstanding candidates for higher degrees. And it provides resources for the new technologies, increased international travel and study programs, and volunteer experiences in the Rochester region that characterize a Nazareth education.

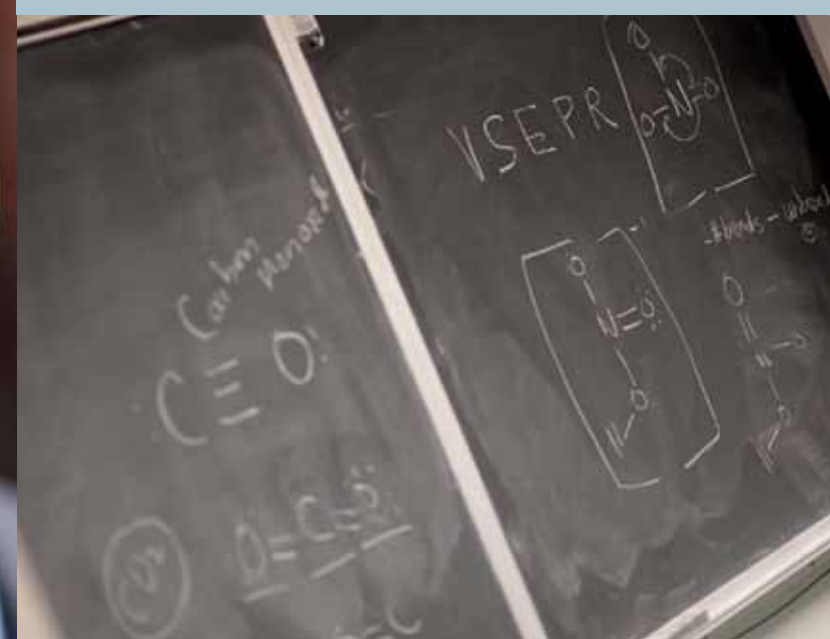
THE NEED About 40 percent of Nazareth students come from families with an annual income of less than \$75,000. The current economic environment and reductions in household incomes underscore the urgency.

NAZARETH’S RESPONSE The overwhelming majority of Naz students—98 percent—receive grants or scholarships that do not have to be repaid. But in fiscal year 2010, only \$800,000 in endowed scholarship funds were available; about \$19 million from the College’s own operating funds went toward scholarship support.



4 endowed professorships at Nazareth

\$2 million minimum gift to endow a professorship



enrich

the learning experience.

“The Schmitt Chair has helped make possible my visits to Brazil, Peru, and Africa,” notes Estella Norwood Evans, holder of the Kilian J. and Caroline F. Schmitt Endowed Chair in Social Work. “It allows me to return the experiences I have in these countries to the classroom and makes me a better teacher.” Endowed professors create knowledge and draw on new worlds to engage their students. They raise teaching to a new level while enhancing Nazareth’s reputation in the academic community and attracting outstanding faculty to the College. Endowed professorships often support students who participate in research with a public service element in the Rochester community. Professorships, interdisciplinary centers, book funds, and other endowed resources motivate members of the Nazareth community to extend their intellectual growth and their global citizenship.

EMPOWERED FACULTY Endowed professorships can be a special memorial to a loved one or mentor; they can also connect the donor’s name to a particular area of academic inquiry.

MULTIYEAR COMMITMENTS Donors who wish to make a larger gift can spread out payments over three to five years. A multi-year pledge offers a greater impact on the College and, by providing a reliable source of funding, helps Nazareth budget over several years.



12.1% return on endowment in 2010

In most years, including 2010, Nazareth has beaten the average endowment return of nearly 800 institutions with endowments under \$1 billion.



support

the future.

“The Edith and George Beattie Scholarship made it possible for me to go through college with minimal loans,” says Lucas Hiley '03, assistant principal, The Dudley School, and president of the Nazareth College alumni board. “More profoundly, it meant that someone who went to Nazareth cared as much as I did about my having the chance to succeed.”

That vote of confidence means everything to student futures—and to the future of the Rochester region. Almost two-thirds of the endowment is unrestricted, allowing Nazareth to meet priority needs in technology and other essential areas while maintaining the flexibility necessary to thrive in a changing environment. Colleges and universities should never rely too much on any one source of funding; historically, however, Nazareth has been approximately 95 percent enrollment-dependent. A healthy, growing endowment adds diversity to Nazareth’s revenue streams and safeguards against future economic downturns.

THE TRADITION Since 1924, Nazareth has worked in close partnership to benefit the Rochester community—and beyond. Through more than 150 endowed scholarships, we’ve changed the lives of thousands of students. These students, in turn, have changed the lives of tens of thousands in the region.

YOUR LEGACY The College greatly appreciates estate gifts or planned giving made in support of facilities, programs, endowed chairs, and/or scholarships.

invest in excellence.

“Nazareth has always managed its endowment portfolio with the objective of supporting the needs of our students today while preserving funds for the students of tomorrow,” explains Margaret Cass Ferber, vice president for finance and treasurer. “Intergenerational equity shapes our approach.” Excellence in investment management is a key to this philosophy. Nazareth’s 12.1 percent return on endowment for the 2010 fiscal year exceeded the average one-year returns for all portfolio size categories up to \$1 billion. If the \$10 million endowment fundraising goal is achieved, it will allow for more scholarships—and more significant scholarships—to support access to higher education. The College can then innovate by deploying the operating funds now used for scholarships to undertake new initiatives. A strong endowment also helps Nazareth borrow money at more attractive interest rates.

WISE STEWARDS Nazareth has a robust infrastructure around its portfolio, including an attentive trustee committee, a strong internal staff, and a professional advisory firm to assist in selecting individual asset management companies.

NAZARETH NEEDS YOU Every single donation, of whatever amount, is extremely important. Your support of the endowment helps individuals succeed and enables the College to fulfill its promise.

facts

Endowment & Scholarships at Nazareth

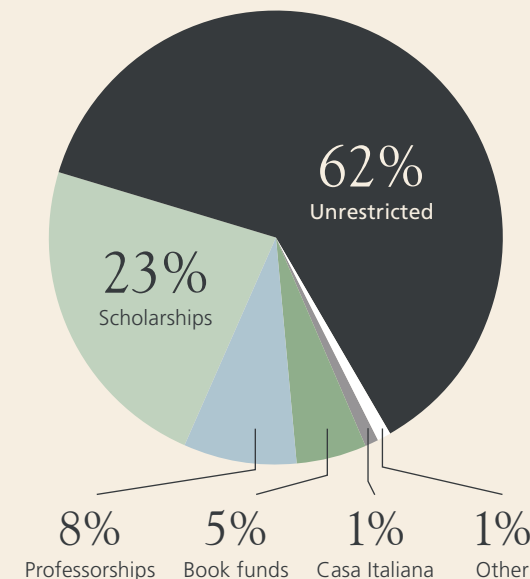
\$70.2 million
Nazareth’s total budget for the year 2011

\$55.1 million
Value of the endowment (December 2010)

\$16,375
Endowment per student as of June 2010, a number much less than our peer and aspirational schools.

\$19 million
Amount from its own operating funds that Nazareth spends on scholarships. It is the second-largest line item in the College’s budget.

Endowment Use



5 things to know about the endowment:

1. The endowment is made up of gifts that are invested to earn annual income and gains. These gifts may go to restricted or unrestricted funds.
2. The endowment fund is invested on a pooled basis, in which all funds are grouped together. The portfolio is invested in stocks, bonds, and other asset categories.
3. Foundations and corporations also look at the strength of alumni support for the endowment fund when making decisions about grant recipients.
4. In addition to scholarships and endowed professorships, endowment funds may replace chemistry lab equipment, buy library periodicals, buy computers for the classroom or library, and much more.
5. The rate of giving to a college’s endowment affects institutional rankings. For instance, alumni participation is one metric considered by *U.S. News and World Report* in determining its rankings each year.

Endowment and Scholarships are part of the Campaign for College and Community. Funding from the campaign has already renovated the Nazareth College Arts Center and supported the construction of the Integrated Center for Math and Science; other initiatives include arts and music and the Nazareth Fund.

Making a gift

For ways to give to scholarships and the endowment and Nazareth’s overall Campaign for College and Community, visit:

www.forcollegeandcommunity.org

or contact:

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