



UTAH VALLEY UNIVERSITY 2020 ENDOWMENT REPORT

The Impact of Your Investment





In an unprecedented year, your support and commitment to Utah Valley University (UVU), have made a dramatic difference in the lives of students, faculty, and our campus community. When you support UVU, you become part of a thriving institution where we, together, create an immediate and enduring impact. The stories of our students are strengthened by your philanthropy and clearly demonstrate the “resiliency” and “grit” of what it means to be a student at UVU.

With your gift to an endowment, the UVU Foundation invests in advancing society – on campus and in the world. By choosing to invest in the UVU Foundation, you are investing in tomorrow. Our endowment is managed by the UVU Foundation Investment Committee, which includes a diverse set of individuals with demonstrated success in private equity and venture capital. We wish to thank these individuals for their time and commitment this past year as we have adjusted to the variable market conditions.

The gifts you give to UVU generate support for years to come. The collective value of UVU’s endowment is \$60,659,858. This number is built from individual endowments created by donors like you. Because endowments are invested for long-term growth and managed under stringent guidelines, the university benefits from reliable streams of income in perpetuity, which have been especially important this year.

Thank you for all you do to support Utah Valley University. Your generosity and commitment help to ensure a promising future, not just for current students but for generations. As we have noted recently, “Education does not stop.” Looking ahead, as we emerge from the COVID-19 crisis, we will continue our commitment to you to guarantee the greatest impact and reach of your gift.

Best,

Scott Cooksey, CFRE
CEO, UVU Foundation
Vice President
UVU Institutional Advancement



Jefferson Moss
COO, UVU Foundation
Associate Vice President
UVU Institutional Advancement



UTAH VALLEY UNIVERSITY FOUNDATION MISSION STATEMENT

The UVU Foundation operates in support of UVU's current and future needs as a vital component in the community's economic and educational engines. The foundation is a forward-thinking philanthropic body supporting the vision of the university by contributing expertise, experience, dedication, and financial resources.

The Vision

The UVU Foundation is an organization of distinction in philanthropy, stewardship, and nonprofit governance.

Our Values



Relationships



Philanthropy



Integrity

STUDENT-FOCUSED



40,936
students as of fall 2020



12,080
high school concurrent enrollment students as of fall 2019



81%
of UVU students work while taking classes

INSTITUTION OF INCLUSION



77
countries represented in the student body



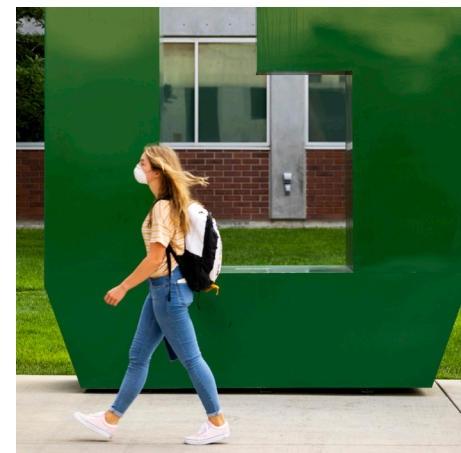
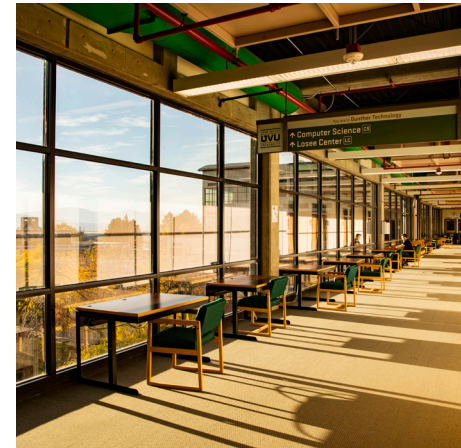
30%
of our students are non-traditional (25+ years old)



17%
of UVU students are also parents

UVU YEAR AT A GLANCE

Education Does NOT Stop



- dōTERRA embraces Utah Valley University with the second-largest donation in school's history (pg 6)
- Construction of I-15 pedestrian bridge begins
- Utah Valley University breaks ground on new Scott C. Keller Business Building (pg 8)
- New mental health clinic at UVU provides treatment, learning opportunities
- UVU celebrates Women's History Month in March (pg 10)
- UVU provides assistance to students in crisis through the newly established Student Emergency Fund
- UVU receives national recognition as First-Gen Forward Advisory Institution (pg 11)
- UVU named as one of the top three universities in the nation for best return on investment
- President's Drive-in Scholarship Ball raises more than \$500,000 for presidential scholars
- Utah Valley University awarded \$1.9 million grant to create an educational program for those with intellectual disabilities

YOUR IMPACT IN ACTION

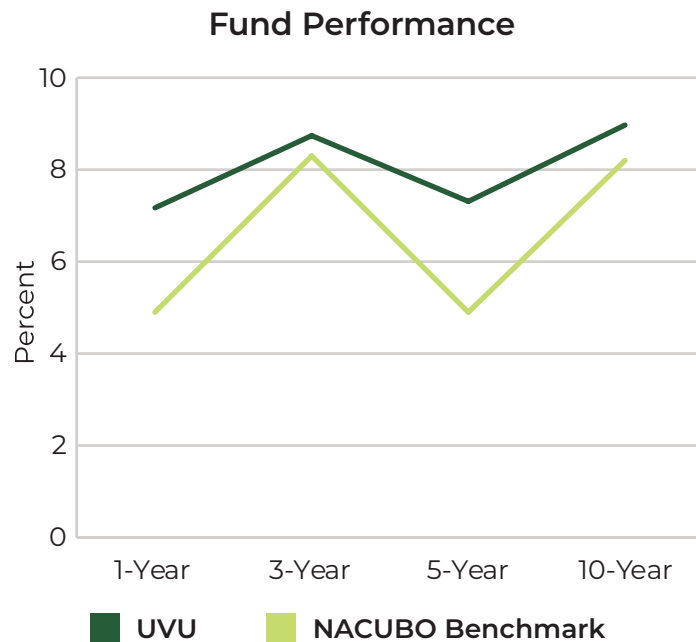
Endowments offer support in perpetuity to Utah Valley University that will help build upon our foundation as an integrated community college and university. The investments of endowment donors provide UVU students with transformational opportunities that positively impact their educational, personal, and professional lives.

Long-term Investment Fund Overview

Endowment Activity	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020
Beginning fair market value	43,988,522	44,700,966▲	44,831,130▲	50,665,935▲	54,488,623▲	55,238,966▲
Contributions received	3,164,013	2,089,507▼	2,968,035▲	2,250,146▼	1,643,880▼	6,520,694▲
Investment earnings	2,613,974	1,725,570▼	5,337,648▲	3,863,703▼	3,904,532▲	2,443,633▼
Cash distributions	(3,894,476)	(2,824,624)▼	(1,536,431)▼	(1,352,290)▼	(3,836,672)▲	(2,644,939)▼
Management fee	(1,171,066)	(860,288)▼	(934,447)▲	(938,871)▲	(961,396)▲	(898,497)▼
Ending fair market value	44,700,966	44,831,130▲	50,665,935▲	54,488,623▲	55,238,966▲	60,659,858▲

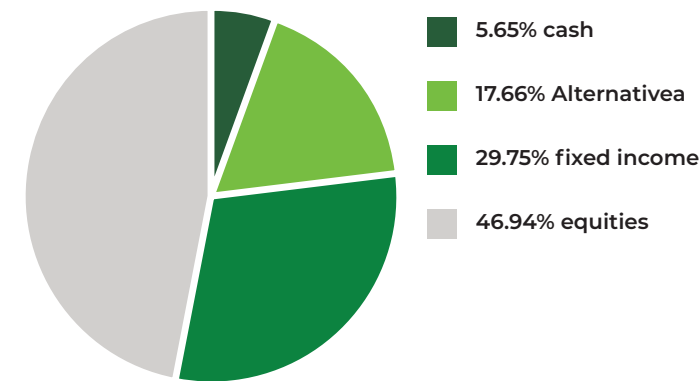
Year Performance

The National Association of College and University Business Officers (NACUBO) aggregates endowment returns across its member institutions and produces average endowment returns from the information collected. This allows UVU to compare its endowment returns to returns of similarly sized university endowments. Because benchmark information from NACUBO is not available for fiscal year 2020, 1-, 3-, 5-, and 10-year return information is as of fiscal year 2019 in order to match available benchmark information from NACUBO. However, for fiscal year 2020, the UVU Foundation showed a 1-year return of 4.5 percent versus an estimated benchmark of 1.2 %. All other data contained in this report is for fiscal year 2020.



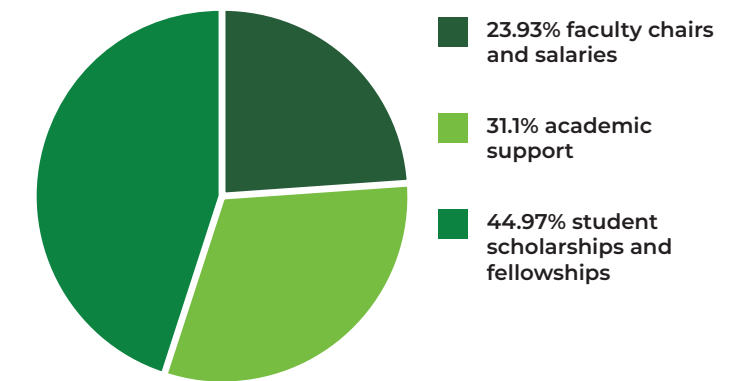
Asset Allocation Fund

The Long-term Investment Fund maintains a balanced approach to investing through diversification across global equity and fixed income markets, as well as investments in private companies, real estate, and other alternative investments.



Distribution

In fiscal year 2020, \$2.6 million were distributed to support UVU's mission of student success.



\$60,659,858
Endowment Value

42
Endowed programs

4
Endowed graduate scholarships

6
Endowed faculty and staff support

186
Endowed scholarships

182
Endowed undergraduate scholarships

DōTERRA EMBRACES UTAH VALLEY UNIVERSITY

In September 2019, dōTERRA, an integrative health and wellness company and the world leader in essential oils, made a \$17.7 million donation to UVU, the second-largest in the institution's history.

The Gift

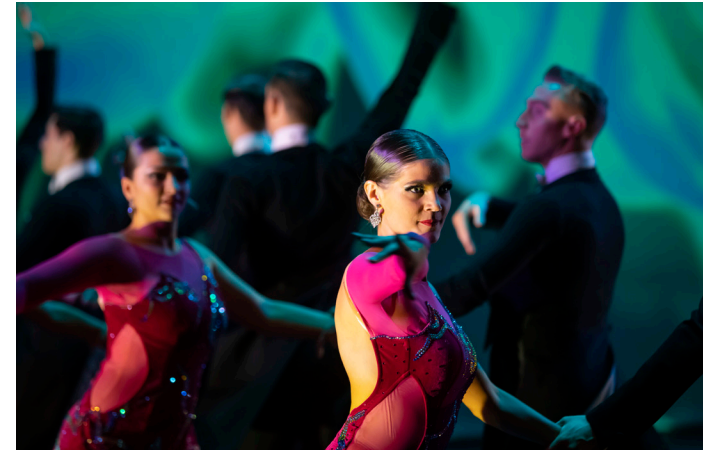
- dōTERRA Wolverine Training Dome
- Student-Athlete Wellness Building
- dōTERRA Field at UCCU Ballpark
- dōTERRA Performance Center in the Lockhart Arena
- The dōTERRA Men's and Women's Basketball Endowment
- UVU Track & Field Program Funding
- UVU Women's Success Center Scholarships
- UVU Center for Constitutional Studies Director and Endowed Chair
- Five-Year Title Sponsor for the Noorda Center for the Performing Arts
- dōTERRA Auditorium in the UVU College of Science

"At dōTERRA we feel an affinity with Utah Valley University. More than 500 of our current employees attend UVU. Plus, we have many employees who graduated from UVU or have children at the university. This donation gives us the opportunity to support a variety of UVU academic, athletic, and art-based programs over the next 10 years."

– David Stirling
dōTERRA's founding executive and CEO



UVU



"Thanks to dōTERRA, the entire UVU basketball program has unmatched resources – I love the facilities, and the coaches, and the guys I play with on this team. The support we've received allows us to do what we love, which is play basketball while representing UVU."

– Truman Brown, '24, point guard



WOODBURY SCHOOL OF BUSINESS

Building on Our Success

Scott C. Keller, president and chief executive officer of Keller Investment Properties and his wife and business partner, Karen Keller, donated \$10 million to complete the funding for the planned Woodbury School of Business Building. UVU broke ground on the Scott C. Keller Building Nov. 11, 2019. The 205,000-square-foot building will house the Bloomberg Lab, Entrepreneurship Institute, Money Management Resource Center, SmartLab, and a grand auditorium for lectures and special events. Classrooms will be outfitted with lecture-capture technology to help students learn remotely.



“We are honored to contribute some of our resources to assist UVU’s wonderful leadership and their pursuit of excellence in providing an environment and opportunity of higher learning on this beautiful, diverse, growing campus. We are privileged, along with our five children (all of whom have either attended or graduated from UVU), to be associated with such a quality institution. We look forward to our growing posterity to also be a part of it for many years to come.”

– Scott and Karen Keller



WOMEN'S SUCCESS CENTER



“When I enrolled at UVU, I became a better version of myself. I started working toward my degree while in high school, nearly 20 years ago. But I stopped school when I married. I was just 19 years old. My then-husband and I started a family right away. I now have five beautiful children, ranging in age from 4 to 17 years old. Even though I loved being a stay-at-home mom, I always wanted to finish my education – I just wasn’t sure when the time would be right. Then, I went through a painful divorce. I realized I had spent my entire married life building my husband’s resume and not my own. I knew it was time to get my own college degree. I would not be able to pursue my education without a scholarship through the Women’s Success Center. It is the generosity of beautiful people like you who elevate our world.”

– Elizabeth Powell, '22
Web Development and Design

The UVU Women’s Success Center, founded in 2011, seeks to help students graduate by providing personalized support and removing barriers that prevent individuals involved with the Women’s Success Center from finishing degrees. The programs include:

- **Scholarships:** On average, students who hold Women’s Success Center scholarships remain in school at rates 17% higher than their peers.
- **Women Lead:** A class designed to prepare individuals to serve in leadership roles in every aspect of their lives.
- **Wee Care Center:** Offering affordable, accessible, quality on-campus child care specifically for parent-students at UVU.

Utah Valley University Women’s Success Center



\$292,271.48
2019-2020 total amount awarded

\$1,282.00
2019-2020 median scholarship amount awarded

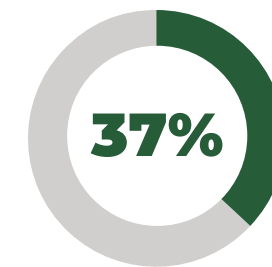
\$2,736.77
2019-2020 average scholarship amount awarded

56 degrees
earned by Women’s Success Center scholarship recipients in 2019-2020 school year

166 scholarships
awarded in 2019-2020

81%
of 2019-2020 Women’s Success Center scholarship recipients are registered for fall 2020 semester

THE FIRST-GENERATION COMPLETION INITIATIVE



37% of UVU students are first-generation

The I Am First program at UVU helps students achieve their goal of being the first in their family to graduate with a bachelor’s degree.

The No. 1 reason first-generation students leave college is due to financial difficulties. Scholarships and specialized resources are critical to help these students reach graduation.

- **More than 75%** come from households with a combined income of \$50,000 or less
- **27%** come from households with a combined income of **\$20,000 or less**

Utah Valley University offers solutions to significantly increase graduation rates for the first-generation population. Support such as faculty and peer mentorship, engagement activities, and networking opportunities have played a crucial role for these students.



“I joined the I Am First program in 2017, and my college experience has been incredible thanks to the support I’ve received. After I graduate and become a teacher, my goal is to help students achieve their own dreams.”

– Crystal Sedano, '21,
elementary education

CONTINUE YOUR IMPACT

For more information about this report or your financial information, visit uvu.edu/endowment or contact:

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