





From the President

To our many friends of the University of North Florida, I want to thank you all for your incredible support over the past year.

Every day at UNF, we see the impact that your philanthropy has on our students, our faculty and staff, our University and our community. We are so grateful for our many community partners and friends who feel so deeply about higher education and improving the lives of our students.

From funding scholarships to supporting research projects and infrastructure, you are providing valuable experiences that allow students to not only succeed while in school, but also after they graduate. We embrace our role as a top provider of talent in Florida and are proud of our graduates who are making a difference in our state and around the globe.

Thank you for your generosity and for caring so much about our students and their future. We truly appreciate your support.

Sincerely,

Moez Limayem, Ph.D.

University of North Florida President



From the Executive Director and Board Chair

On behalf of the University of North Florida Foundation

Board of Directors, we are pleased to share with you our Annual Report for the 2022 – 2023 fiscal year.

Each gift to UNF has a story, and in this report, you'll learn what motivates so many to give and how those gifts are changing lives every day. We are grateful for the wonderful partnerships that exist here at UNF and play such an important role in advancing our mission. Your support not only makes college a reality for many, but also funds meaningful research and other critical initiatives and experiences for students, faculty, staff and our community.

Through your generosity, the Foundation exceeded its FY23 fundraising goal, closing out the year at almost \$27 million, a 25% increase in cash, pledges and planned gifts over the prior year.

Also, this year the University finalized its five-year Strategic Plan for 2023 — 2028, and we recognize the important role the Foundation plays in supporting these goals to grow enrollment, elevate our national reputation and continue to expand our research activities. Your gifts directly support these endeavors and we look forward to realizing what we can accomplish together.

Thank you for the endless opportunities you create for our students, faculty and staff. We are truly grateful for all you do for UNF.

Sincerely,

Olresa Nichols-

Teresa Nichols, '94

Vice President for University Development and Alumni Engagement and Executive Director of the UNF Foundation, Inc.

Chuck Ged, '86 Chair, UNF Foundation, Inc.

Board of Directors

05 • UNF FOUNDATION ANNUAL REPORT



2022 - 2023 UNF FOUNDATION Board Members

Steve Bachand

Doug Baer

Scott Baker

Martha Barrett

David Brown

Jason Burnett, '85

Bennie Clark

Dwight Cooper

Curt Cunkle

Shantel Davis, '99

Elana Dietz

Lory Doolittle

Chuck Ged, '86

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Marilyn Gilman, '17

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John Hayt

Ann Hicks, '95

Corinne Hodak, '86

Jonathan Howe Kawanza

Humphrey Debbie

Johnson, '85, '89

Irene Lazzara

Anne Lufrano

Tony Marinatos

Michael Mayo

Scott McCaleb

Vince McCormack

Doug Moffitt

Almeta Monroe-Turner

Chuck Moorer

Jorge Morales

Russell Newton III

Damon Olinto, '83

Lindy Prudencio, '02

Henry Puente, '79

Amy Rice

Conchita Robinson

Susan Ryzewic Susan

Schantz Elana

Schrader Ryan

Schwartz Neera Shetty

Travis Shore, '99

Xiao-Yu Song

NEW MEMBERS

FISCAL YEAR 2023 - 2024

Chris Brady, '15

Dean Sunas



UNIVERSITY of NORTH FLORIDA Foundation, Inc.

Opening doors for first-generation college students

Steve and Phyllis Bachand love the University of North Florida and the opportunities the University offers students, especially those who are the first in their families to attend college. They appreciate the unique experiences and resources that UNF provides and love seeing the University grow in prominence.

For Steve, UNF is the place to be. "Why do many baseball players want to play for the Red Sox or the Yankees? Because it is where you want to be," he said. Bachand believes UNF is a vibrant place for students and for donors who want to make a difference. "I need to be in an environment that's alive and well and fun to be a part of," he said.

Steve and Phyllis, both know the difference a college degree can have on future success, especially how that vital first step can change a person's trajectory.

Phyllis followed the path her mother started and graduated from Florida Southern College and Maryland Institute College of Art to launch a successful art career.

Steve, a retired president and CEO of Canadian Tire Corp. Ltd., had a successful business career that included serving as a director on a number of corporate boards. Steve earned a bachelor's degree from Williams College and an MBA from the University of Virginia Darden School of Business. He is also a first-generation college graduate.

Steve and Phyllis established a scholarship benefiting first-generation students due to the significance

that this first step makes on transforming lives.

The couple wanted to ensure flexibility in its requirements by not mandating recipients pursue specific careers or programs.

"The only requirement is great achievement, which we have as an understanding with the students," said Steve, hoping all applicants will strive for academic excellence.

He enjoys seeing the proud faces of parents, arand-

parents and siblings as they celebrate a student's academic success. "It's absolutely heartwarming," Steve said. "It's a wonderful thing to see."

As a UNF Honorary Alumni, Steve has been a longtime member of the UNF Foundation Board and serves on the Investment and Finance and Audit Committees guiding the board with his expertise. He and Phyllis regularly attend the Foundation's First-Generation Scholarship Luncheon, where they make lasting memories with students and others at UNF. They hope to see continued and growing support for first-generation students.

Phyllis grew up in Jacksonville and has seen the University's tremendous growth spanning decades. As a philanthropist, she said it's fulfilling to see their investment in the University in real time. "We love interacting with the students."

Phyllis said she loves receiving letters from their scholars, who provide updates on their progress throughout their studies. "The letters are both moving and compelling," Phyllis said. "First-generation students have so much ambition and such a desire to learn."





A living legacy realized through art

When Maria Cox and her husband, Donald, moved to Ponte Vedra Beach from New York City, they already had a personal art collection dating back to the early 1970s.

Maria used her art history degree from Cornell at architectural and interior design firms across the country and long held an affinity for the arts and its impact on society.

The Coxes soon discovered a new hub for their shared passion at the Museum of Contemporary Art (MOCA) Jacksonville and quickly became involved in supporting its progress and growth.

After Donald passed in 2006, Maria continued to support MOCA, serving as a trustee for 12 years and gifting the Donald and Maria Cox Collection of contemporary pieces to the museum in 2016. Following Maria's death in 2021, a generous planned gift created an endowment that she designated for MOCA, providing lasting, unrestricted funds to support the museum's sustainability.

Caitlin Doherty, MOCA's executive director, was inspired by Maria's consistent enthusiasm for MOCA's programming and offerings.

"She had great curiosity and a great passion for the arts, her community, her family, and she was very involved," Doherty said. "She spoke about art changing the way you think or affecting your day-to-day life or challenging you in some way, and she loved that."

Doherty said Maria understood the museum sector

in a grand way, and the endowment created to address MOCA's needs will benefit the museum in perpetuity. Her gift will allow many more minds to be opened and educated through the art collections, exhibits and programs at MOCA.

"Our mission focuses on the art, artists and ideas of our time," Doherty said. "This endowment, made possible through Maria's generous gift, means that Maria Cox continues to support that mission for generations to come. That seems entirely fitting for someone who supported our museum so generously in so many ways while she was with us."

As the second-oldest contemporary museum in the United States, MOCA Jacksonville is celebrating its centennial in 2024 strong and confident in its mission.

"We have an extraordinary story to tell," Doherty said. "This incredible milestone prompts us to reflect on the

wonderful people like Maria. We celebrate how their legacy, their leadership, their excitement and passion got us to this point and how that passion and drive will lead us into our next 100 years."



A new generation of philanthropy

Joslyn Simmons is committed to bringing a new face to the forefront of philanthropy.

"Philanthropy means giving something," Simmons said. "It might not always be money. It could be your talents, time or guidance."

The double UNF alumna ('18, '20) valued her time as a student and came back to work as an operations coordinator for the Coggin College of Business. She wanted to give back and create opportunities for others to pursue a college degree,

but wasn't sure at first where to start.

By working with UNF's development staff, Simmons found inspiration to create a scholarship after experiencing the secondhand joy from students who earned them. She said a colleague told her that "even if you give a dollar, you're a philanthropist." She sought advice from her mother, Angela, and they worked together to make her dream of a scholarship a reality, focusing on the act of giving and less on the amount.

Simmons said her father, Theodis Simmons Jr., inspired her to pursue college after watching him take classes throughout his career in the U.S. Navy. He eventually earned his bachelor's degree but went on to earn two master's degrees. In 2022, she established the Theodis Simmons Jr. Scholarship to honor his years of military service and commitment to higher education.

The scholarship opens new opportunities for military

students who may be part of underrepresented groups on campus. Simmons recognizes their vital contributions to the workforce after completing their military service and wants to give these students more avenues for success.

She saw the need for this scholarship firsthand, when she received a call from a service member who missed the deadline to apply. She empathized with his struggle and remembered her father's journey in higher education.

The skills acquired from a military background can go unnoticed when a military member transitions into civilian life and she wants to ensure opportunities are in place to allow all active-duty military and veterans to have access to quality education.

"Sometimes they just need a chance to show that they can do it," she said. "Once they get that chance, they are the best people to be in the workforce or at school because they are going to try their hardest to keep up."

As an African American woman, Simmons believes students respond positively to seeing broad representation among staff at the University, and she hopes to inspire other students. She is grateful that her work at UNF gives her further opportunities to give back to the campus community and encourages others to support students who are

seeking a brighter future through higher education.



Undergraduates in STEM and health fields

have increased by 85% in the last 10 years

UNF is ranked a

Top Military Friendly School for the 13th consecutive year

Florida is the #1 state

for higher education in the U.S. since 2017

— U.S. News & World Report

UNF IS #1

in the SUS for % of graduates employed in Florida

\$1.375 billion

UNF's Economic Impact on Florida

UNF holds Carnegie's

R2 Designation for High Research Activity

Money magazine ranks UNF among the 2023

Best Colleges in America





JEA and UNF seek sustainable solutions

Through an innovative collaboration, JEA and the University of North Florida are boosting efforts to support clean and renewable energy education and research. The new JEA Sustainable Solutions Lab at UNF, made possible through a five-year financial commitment from JEA, will help prepare future engineers, scientists and industry professionals by giving students opportunities to learn about clean and renewable energy technology, while providing critical space for related research.

As part of the collaboration, UNF students will be working directly with JEA professionals on clean energy projects, while JEA staff and UNF faculty work together to develop relevant academic programming related to green energy. The lab will be a hub for research to develop sustainable solutions for JEA and other industries.

JEA has long been a partner with UNF, originally providing support in 2001 for a Clean and Renewable Energy Lab. The gift created one of the most successful research labs in UNF history, resulting in more than \$18 million in research funding through federal, state and private sources. The JEA Sustainable Solutions Lab is a newly envisioned lab to renew and further this work. To date, more than 100 undergraduate and graduate students have participated in JEA and UNF research and education projects.

"We are so excited about this renewed collaboration with JEA to create the Sustainable Solutions Lab," said UNF President Moez Limayem. "JEA's support will help our students get the hands-on experience they need to make an impact in areas related to water sustainability and clean and renewable energy. This is the kind of

mutually beneficial relationship that not only helps our local partners, but also gives our students

incredible experience before they graduate."

While JEA exists to meet the electric, water and sewer demands of local customers, the authority is committed to environmental responsibility to ensure that resources are available for future generations. This dual goal is made possible through customer education efforts and partnerships like this one to develop talent and support sustainability research and practices that will protect our resources.

"This is a win-win for JEA and UNF. As students work on solutions to sustainability challenges, JEA will learn from their research," JEA Managing Director and CEO Jay Stowe said. "And our entire community will benefit as well, as this joint effort will establish a pipeline of talented professionals ready to contribute to our clean energy goals for Northeast Florida."

Student projects already underway in the lab include small-scale, operational microgrid solar panel systems, solar photovoltaic projects, solar thermal and internal combustion engines, a hydrogen-fueled, fuel cell golf cart and work related to autonomous vehicles.

Emeritus faculty provides hope and opportunity

It was a scholarship that led Dr. Judith Rodriguez to her life's passion and today, though the Judith Rodriguez Nutrition & Dietetics Endowed Scholarship,

she is making similar opportunities possible for students at the University of North Florida.

The emeritus faculty member is recognized as a national expert in the field of nutrition and dietetics.

A former president of the Academy of Nutrition and Dietetics (previously the American Dietetic Association), Rodriguez served as a professor and chair of UNF's Nutrition and Dietetics program, which she built from the ground up with other faculty members. She has also written numerous peer-reviewed articles in prestigious journals and co-authored four books on the subject.

Rodriguez shared when she was ready to go to college, she applied to numerous universities and programs and it was a scholarship that determined her trajectory. "I got a scholarship to study nutrition

at NYU, so that is where I went," said Rodriguez, who also earned a master's degree in nutrition and higher education there and a doctorate in cultural anthropology at Rutgers, The State University of New Jersey. Prior to coming to UNF in 1988 where she spent more than 30 years, Rodriguez served as a clinical dietitian, as an extension associate at Cornell University, an instructor at various colleges and as a consultant for a National

Hispanic Health and Nutrition Study and a variety of non-profit and for-profit organizations.

Early in her academic career, she received a grant to study transfer students and the barriers they faced to earn a degree. Again, financial aid surfaced as a top need. Now retired, Rodriguez wants to help ease the financial burdens that students face, allowing them to have a full experience while in college.

"We know when students have to work, they are unable to participate in other important and fulfilling activities," said Rodriguez. "I want to help alleviate that so they can become exposed to these valuable programs and leadership experiences." She loves teaching, mentoring and developing leaders in the field of nutrition and dietetics and has found it especially rewarding to see them succeed after they graduate.

Currently, the scholarship fund is aimed to help undergraduates pay for college, but Rodriguez would like to ultimately grow support and expand assistance to help graduate students.

"Higher education is a great equalizer and benefits society as a whole," said Rodriguez. "I have found great joy over the years seeing our graduates flourishing in their careers, in leadership positions and living fruitful well-rounded lives."

Knowing firsthand the significant impact scholarships can have on a student and their families, she hopes that others will also be inspired to give.



Unique Giving



CELEBRATING THE FUTURE

Dr. Moez Limayem shared his Inauguration Day in April 2023 with more than 1,000 students, faculty, staff, alumni and friends. The Inauguration included a procession through campus, investiture ceremony and a campus celebration, where 10 \$2,500 scholarships were awarded to students, compliments of Florida Blue. The entire event was funded through the generosity of UNF donors, including John and Gerri Hayt, Anne and Bob Lufrano, Tony and Anna Marinatos, Chuck and Nicki Moorer, GrayRobinson, Ryan Schwartz, T5 Sportswear & Promotions, Jim Van Vleck and the UNF Center for Instruction and Research Technology. Many, many thanks for making this special day so meaningful for President Limayem, his family and the entire Osprey community!

BEE the Difference

George Sares is a longtime friend of UNF. In addition to his generous donations for scholarships over the years, Sares donated live bees, bee boxes and other materials so students could start a Bee Club at UNF. This also included generously donating his time and expertise so students could learn how to properly care for bees. In addition to this unique gift, Sares, a former U.S. Marine helicopter pilot, recently created an endowed scholarship and fellowship to support students in the College of Computing, Engineering and Construction, with preference given to military veterans.

Kevin Anderson, Ogier Garden Coordinator, and George Sares





Supporting Innovation

This year, Johnson & Johnson Vision extended its collaboration agreement with UNF to lend support to the Advanced Manufacturing Engineering program for faculty, research, undergraduate scholarships and graduate student stipends. As part of this collaboration, UNF will hire a new full-time, tenure track professor in engineering to perform manufacturing research and development in a lab outfitted with J&J sponsored research activities and equipment, giving students exposure to cutting-edge technology and a distinct advantage in the job market.



Carving a path

Diane Insetta, local bronze and stone sculptor, along with her husband Victor Insetta, generously gifted a variety of stones and stone-carving tools and equipment to the UNF Sculpture Program. The materials and equipment will allow students to add stone-carving to their artistic practice.

















This year's endowment marks the highest ever spending allocation in UNF history

\$5.4 million

\$4.3 million to

1,636 students
scholarships, fellowships and study abroad

3,416
donors contributed to
a record-breaking
Giving Day total of more than
\$1 million

\$26.6+ million raised

19,540
Gifts to UNF

313
First Generation Scholarships awarded

FY 2022 – 2023 Financial Information

The UNF Foundation, Inc., a nonprofit, tax-exempt entity, was organized and incorporated in 1971 for the purpose of providing voluntary private support from alumni, parents, friends, corporations, foundations and others for the benefit of the University of North Florida. Through diligent stewardship and

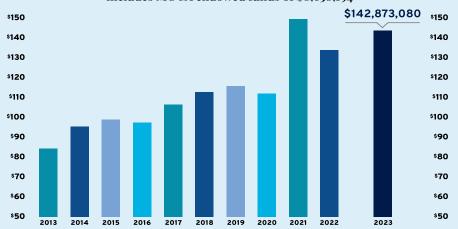
careful planning, maximum benefit is reached for each dollar donated. The Foundation is proud of the many scholarships, professorships, programs and community outreach initiatives funded through these generous gifts and the tremendous impact this support has on UNF and its students.

SUMMARY AUDITED STATEMENTS OF FINANCIAL POSITION

	FY 2023 JUNE 30, 2023	FY 2022
ASSETS		
Current Assets	11,938,096	14,514,811
Noncurrent Assets	189.432,847	174,948,693
TOTAL ASSETS	\$201,370,943	\$189,463,504
LIABILITIES AND NET POSITION		
Current Liabilities	972,579	713,763
Permanent Endowments	134,214,866	126,541,695
Restricted Funds	32,304,285	30,997,470
Capital Assets	30,230,000	30,230,000
Unrestricted Funds	3,649,193	980,576
TOTAL LIABILITIES AND NET POSITION	\$201,370,943	\$189,463,504

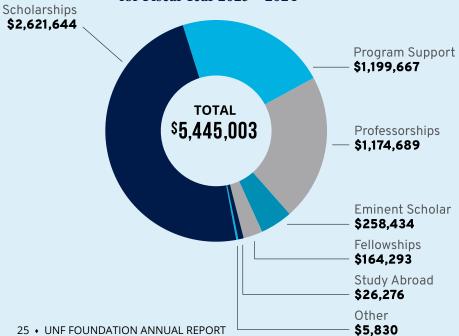
ENDOWMENT BALANCE

ending June 30, 2023
*includes MOCA endowed funds of \$8,658,194



ENDOWMENT SPENDING ALLOCATION

for Fiscal Year 2023 - 2024



FOUNDATION ENDOWMENT

The University of North Florida Foundation provides prudent fiduciary management and oversight of the University Endowment.

The investment and management of the Endowment is governed by the Florida Uniform Prudent Management of Institutional Funds Act (FUPMIFA).

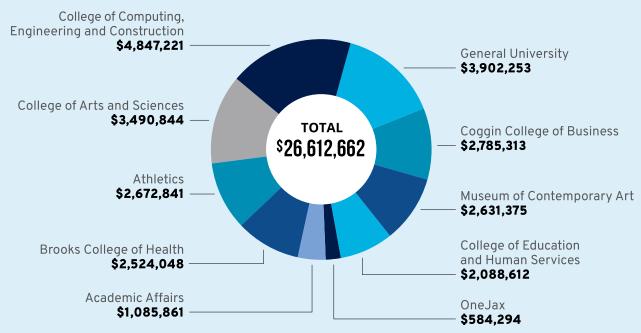
The Foundation Investment Policy:

- adheres with the requirements of FUPMIFA,
- ensures good faith, prudent management of the assets in order to serve the best interests of persons that rely on the distributions from these assets.
- addresses the long-term interests of the Endowment,
- adheres to accepted investment and financial management principles,
- addresses the institution's present and anticipated financial resources, and
- considers other resources of the institution.



FY 2022 – 2023 Financial Information

DESIGNATION OF GIFTS



DONOR Bill of Rights

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life.

To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

- To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
- II. To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
- III. To have access to the organization's most recent financial statements.
- IV. To be assured their gifts will be used for the purposes for which they were given.
- To receive appropriate acknowledgement and recognition.

- VI. To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.
- VII. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
- VIII. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
- IX. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
- X. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

NEW ENDOWMENTS FY 2022 – 2023

A special thank you to our donors who created these new endowments in the past fiscal year.

Jennifer Bittner Memorial Communication Scholarship Endowment

Tom and Kris Bolt Soccer Endowed Scholarship

J.B. Coxwell Endowed Scholarship

Dr. Brooke Davis Memorial Pre-Veterinary Scholarship Endowment

James Dupree Scholarship Endowment

Geddes Enterprises/ Dav-Lin/Chancey Metals Endowed Scholarship

Jeff and Deb Harrison Health Leadership Scholarship Endowment

JEA Sustainable Solutions Lab Endowed Fund Lastinger Center for Florida History Endowed Fund

Frank B. Marcon Memorial Endowed Scholarship

William Lee "Coach" Moon, Sr. Endowed Scholarship

Dr. William Pearce Memorial Cross Country and Track Endowed Scholarship

Amy and Jason Rice Endowed First Generation Scholarship

Robinson Family Scholarship Endowment

Judith Rodriguez Nutrition & Dietetics Endowed Scholarship

ROSE Nourish to Flourish Endowment Jim Sabo Memorial Endowed Scholarship

> Sares and Sons Endowed Scholarship

Sares and Sons Endowed Fellowship

Setzer Family Healing Gardens Fund

Shad Family First Generation Scholarship Endowment

> Stephen Shapiro Endowed Scholarship

Synovus Bank First Generation Endowed Scholarship

Williams-Nasby Nursing Endowed Scholarship

UNF Foundation Staff

Teresa Nichols, '94 Vice President for University Development and Alumni Engagement and Executive Director of the UNF Foundation, Inc.

Scott Bennett

Vice President for Administration and Finance and Treasurer of the UNF Foundation, Inc.

UDAE CENTRAL ADMINISTRATION

Gabe Grass, '04
Director of Corporate Relations and Major Gifts

Michael McLaughlin Assistant Vice President

Andrew Schmidt Assistant Vice President

Nicole Gengler, '17, '20 Administrative Specialist

Hannah Lindenblad Development Associate

Arianna Merkley
Development Associate

ADVANCEMENT OPERATIONS

Olga Igolnikov Associate Vice President for Foundation Operations and Accounting

Terry Synnott
Associate Director of Prospect Research

Anna Tyre Associate Director of Gift Processing

Emily Gebbia Accounting Coordinator

Tami Johnson Assistant Director of Endowment Accounting

Sarwar Ayubi Accounting Associate

Melanie Wallace, '22 Project Research Coordinator

Stanley Mlynarczyk Accounting Associate

Luis Puesan

Data Management Coordinator

ANNUAL GIVING

Kristine Herrington
Director of Annual Giving

Ashley Peterson, '16, '19 Assistant Director of Annual Giving

Jean Lipsky, '15
Assistant Director of Student Philanthropy

DONOR ENGAGEMENT AND STEWARDSHIP

Lea Fernandes Director of Donor Engagement and Stewardship

Kate McMillan, '17 Assistant Director of Donor Engagement and Stewardship

Lauren Giliberto
Assistant Director of Special Events

Victoria Armenta Special Events Coordinator

Stephanie Giordano, '22 Scholarship Coordinator

Kayonna Ford, '23 Executive Secretary

ALUMNI ENGAGEMENT

Colin McKinney, '13 Director of Alumni Engagement

Michael Harrison Alumni Services Coordinator

Olivia Rearick, '22 Alumni Services Coordinator

FOUNDATION ACCOUNTING

Associate Director of Foundation Accounting

Pam Fletcher Accountant

Tia Smith Accounting Coordinator

DEVELOPMENT

ACADEMIC AFFAIRS

Kathleen Leone, '16
Director of Development

ATHLETICS

Matthew Lisiewski Senior Associate Athletic Director Josh Baker, '10 Assistant Athletic Director of Development

Derek Marinatos

Assistant Athletic Director of Development

Jaycie Wegner

Assistant Athletic Director of Development and Special Events

BROOKS COLLEGE OF HEALTH

Michelle Drinks

Director of Development

Director of Development

COGGIN COLLEGE OF BUSINESS

Kara Barber, '14

Assistant Director of Development

COLLEGE OF ARTS AND SCIENCES

Anne-Marie Campbell Director of Development

Jenna DuPilka, '19 Assistant Director of Development

COLLEGE OF COMPUTING, ENGINEERING AND CONSTRUCTION

Caleb Garrett
Director of Development

COLLEGE OF EDUCATION AND HUMAN SERVICES

Lucy Klausner Director of Development

MUSEUM OF CONTEMPORARY ART (MOCA)

Gabrielle Dean-Rector Director of Development

Shannon Cullen-Brosonski Assistant Director of Development

CREATIVE

Alex Achorn

Assistant Director of Marketing and Publications

Stephanie Hitchens, '18 Graphic Designer

Tyler White, '11 Staff Writer

