Number and street (or P.O. box if mail is not delivered to street address)

Telephone number

City or town, state or country, and ZIP + 4

#### Summary

Activities & Governance

1

Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)

Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)

Grants and similar amounts paid (Part IX, column (A), lines 1–3) . . . .

Benefits paid to or for members (Part IX, column (A), line 4) . . . . .

Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)

Other expenses (Part IX, column (A), lines 11a–11d, 11f–24f) . . . .

Revenue less expenses. Subtract line 18 from line 12 . . . . . . . .

Net assets or fund balances. Subtract line 21 from line 20.

Total liabilities (Part X, line 26) . . . . . . .

Net Assets o Fund Balance Form 990 (2008)

Par	t III Statement of Program Service Accomplishments (see instructions)
1	Briefly describe the organization's mission:
	Loyola University Maryland is a Jesuit Catholic university committed to the educational and spiritual traditions of the Society of Jesus and to the ideals of liberal education and the
	development of the whole person. Accordingly, the University will inspire students to learn,
	lead, and serve in a diverse and changing world.
2	Did the organization undertake any significant program services during the year which were not listed on
	the prior Form 990 or 990-EZ?
	If "Yes," describe these new services on Schedule O.
3	Did the organization cease conducting, or make significant changes in how it conducts, any program services?
	services?
4	Describe the exempt purpose achievements for each of the organization's three largest program services by expenses.
	Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.
4a	(Code:) (Expenses \$including grants of \$) (Revenue \$)
	See Statement 2
4b	(Code:) (Expenses \$including grants of \$) (Revenue \$)
4c	(Code:) (Expenses \$including grants of \$) (Revenue \$)
	Other program services (Describe in Schedule O.)
40	Other program services. (Describe in Schedule O.) (Expenses \$ 23,445,739 including grants of \$ 0 ) (Revenue \$ 28,901,201 )
10	Total program service expenses © \$ 164 120 382 (Must equal Part IX   line 25 column (B))

### **Checklist of Required Schedules**

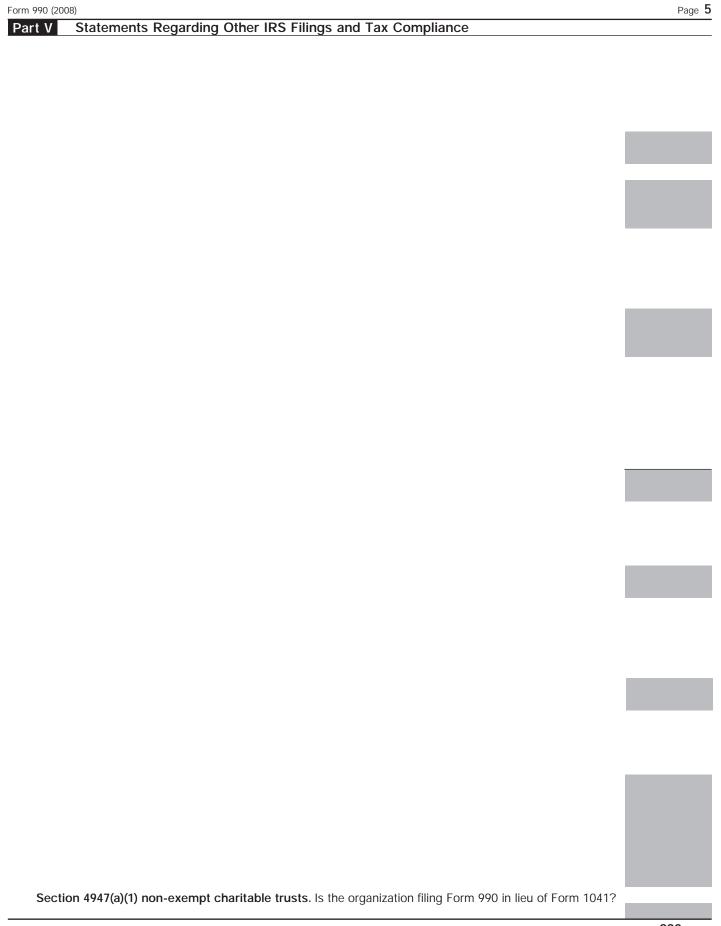
	·		Yes	No
		1		
2	Is the organization required to complete Schedule B, Schedule of Contributors?	2		
		3		

Page 4

### Form 990 (2008) Part IV Checklist of Required Schedules (continued)

			res	INO
28	During the tax year, did any person who is a current or former officer, director, trustee, or key employee:			
а	Have a direct business relationship with the organization (other than as an officer, director, trustee, or employee), or an indirect business relationship through ownership of more than 35% in another entity (individually or collectively with other person(s) listed in Part VII, Section A)? If "Yes," complete Schedule L,			
	Part IV	28a		/
b	Have a family member who had a direct or indirect business relationship with the organization? If "Yes," complete Schedule L, Part IV	28b		~
С	Serve as an officer, director, trustee, key employee, partner, or member of an entity (or a shareholder of a professional corporation) doing business with the organization? <i>If "Yes," complete Schedule L, Part IV</i>	28c	~	
29	Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M	29	~	
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>	30		~
31	Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>	31		<b>/</b>
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>	32		~
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>	33		~
34	Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1	34	/	
35	Is any related organization a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2	35		<b>/</b>
36	<b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>	36		>
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>	37		~

Form **990** (2008)



29 26

MD

# Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Use Schedule J-2 if additional space is needed.

- c List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- $\circ$  List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- c List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

Name and Title	Positi	on (c	(C	C) k all	that ap	(vla	(D) Reportable	<b>(E)</b> Reportable	<b>(F)</b> Estimated
					Highest compensated employee	Former	Reportable compensation from the organization (W-2/1099-MISC)	Reportable compensation from related organizations (W-2/1099-MISC)	Estimated amount of other compensation from the organization and related organizations
See Statement 5									

2,715,184 0 436,560

See Statement 6

Form 990 (2008) Page **9** 

	0 0 0				
	0 6,853,218				
	4,998,320				
	510,444	11,851,538			
Tuition and Fees Residence, Food Service, Tele	611310 611310	152,790,928 <b>28,901,201</b>	152,790,928 <b>28,901,201</b>	0	0
Special Educational Programs	611310	1,937,973	1,937,973	0	0
ID Cards, Orientation, Parking	611310	1,038,103	99,941	0	938,162
Athletics, Conferences, Retrea	611310	0	667,010 0	0	942,326 0
		<b>0</b> 186,277,541	0	0	0
		1,325,289	0	0	1,325,289
		119,934 0	0	0	119,934 0
359,259	0				
0 359,259	0				
359,259	U	359,259	0	0	359,259
		333,233			
6,642,270	0				
12,502,951	0				
-5,860,681	0				
, ,		-5,860,681	0	0	-5,860,681
Gross income from fundraising events (not including $\$$					
Fitness and Aquatic Center	611310	1,326,692	1,326,692	0	0
Restricted Revenues	611310	571,023	571,023	0	0
Miscellaneous	611310	674,052 0	674,052 0	0	0
			0	U	
		400.011.01=	400.000.000		0.475.744
		196,644,647	186,968,820	0	-2,175,711

### **Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

	not include amounts reported on lines 6b, , 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	<b>(D)</b> Fundraising expenses
1	Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21				
2	Grants and other assistance to individuals in the U.S. See Part IV, line 22				
3	Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16				
4					
5	Compensation of current officers, directors, trustees, and key employees				
6	Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7	Other salaries and wages				
8	Pension plan contributions (include section 401(k) and section 403(b) employer contributions)				
b c d	Other employee benefits Payroll taxes Fees for services (non-employees): Management Legal Accounting Lobbying Professional fundraising services. See Part IV, line 17 Investment management fees Other Advertising and promotion Office expenses				
	Information technology				95,246
	Payments of travel or entertainment expenses for any federal, state, or local public officials Conferences, conventions, and meetings . Interest	0 482,290	234,581	0 227,577	0
	Depreciation, depletion, and amortization.		7,485,614	502,730	
	Other expenses. Itemize expenses not covered above. (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below.)				
b c	Total functional expenses. Add lines 1 through 24f				

Form 990 (2008) Page **11** 

Part X **Balance Sheet** (A) Beginning of year (B) End of year 1 2 2 3 3 4 4 Receivables from current and former officers, directors, trustees, key 5 employees, or other related parties. Complete Part II of Schedule L . Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete 6 7 Assets 8 9 Prepaid expenses and deferred charges . Land, buildings, and equipment: cost basis 10a Less: accumulated depreciation. Complete 10b 11 11 Total assets. Add lines 1 through 15 (must equal line 34) . . . . 17 Accounts payable and accrued expenses . . . . . . . . . . . . 18 19 20 Escrow account liability. Complete Part IV of Schedule D . . . . 21 Payables to current and former officers, directors, trustees, key 22 employees, highest compensated employees, and disqualified 23 Secured mortgages and notes payable to unrelated third parties . . . 24 Other liabilities. Complete Part X of Schedule D . . . . . . . . . 25 Total liabilities. Add lines 17 through 25 . . . . . . 26 Organizations that follow SFAS 117, check here ©  $\square$  and Net Assets or Fund Balances complete lines 27 through 29, and lines 33 and 34. 27 27 28 28 29 29 Organizations that do not follow SFAS 117, check here © and complete lines 30 through 34. 30 Capital stock or trust principal, or current funds . . . . . . . . 30 31 Paid-in or capital surplus, or land, building, or equipment fund . . . 31 32 32 Retained earnings, endowment, accumulated income, or other funds 33 33 34 34

### SCHEDULE A (Form 990 or 990-EZ)

### **Public Charity Status and Public Support**

To be completed by all section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts.

© Attach to Form 990 or Form 990-EZ. © See separate instructions.

OMB No. 1545-0047

2008

Open to Public

Department of the Treasury Internal Revenue Service

Attach to Form 990 or Form 990-EZ. See separate instructions. Inspection

Name of the organization Employer identification number 52 0591623 LOYOLA UNIVERSITY MARYLAND INC Reason for Public Charity Status (All organizations must complete this part.) (see instructions) Part I The organization is not a private foundation because it is: (Please check only one organization.) A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i). A school described in section 170(b)(1)(A)(ii). (Attach Schedule E.) A hospital or a cooperative hospital service organization described in section 170(b)(1)(A)(iii). (Attach Schedule H.) 3 A medical research organization operated in conjunction with a hospital described in section 170(b)(1)(A)(iii). Enter the hospital's name, city, and state: ..... ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in 5 section 170(b)(1)(A)(iv). (Complete Part II.) ☐ A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v). 6 An organization that normally receives a substantial part of its support from a governmental unit or from the general public 7 described in section 170(b)(1)(A)(vi). (Complete Part II.) A community trust described in section 170(b)(1)(A)(vi). (Complete Part II.) ☐ An organization that normally receives: (1) more than 33½% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 331/2 % of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See section 509(a)(2). (Complete Part III.) An organization organized and operated exclusively to test for public safety. See section 509(a)(4). (see instructions) ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box that describes the type of supporting organization and complete lines 11e through 11h. a □ Type I **b** Type II **c** Type III–Functionally integrated **d** Type III-Other e Dy checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). f If the organization received a written determination from the IRS that it is a Type II, or Type III supporting Since August 17, 2006, has the organization accepted any gift or contribution from any of the g following persons? No (i) A person who directly or indirectly controls, either alone or together with persons described in (ii) 11g(i) and (iii) below, the governing body of the supported organization? . . . . . . . . . . 11g(ii) (ii) A family member of a person described in (i) above? 11g(iii) (iii) A 35% controlled entity of a person described in (i) or (ii) above? . . . . . . Provide the following information about the organizations the organization supports. h (ii) EIN (iii) Type of organization (i) Name of supported (iv) Is the organization (v) Did you notify (vi) Is the (vii) Amount of organization (described on lines 1-9 in col. (i) listed in your the organization in organization in col. support above or IRC section governing document? col. (i) of your (i) organized in the (see instructions)) support? U.S.? Yes Nο Yes Nο Yes Nο

Total

Schedule A (Form 990 or 990-EZ) 2008 Page 2 Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi) (Complete only if you checked the box on line 5, 7, or 8 of Part I.) Public support percentage for 2008 (line 6, column (f) divided by line 11, column (f))

### Part III

**First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** 

Part IV	Supplemental Info Part II, line 17a or	<b>ormation.</b> Completon 17b; or Part III, line	e this part to pro a 12. Provide any	vide the explanation other additional in	on required by Part I formation. (see instru	I, line 10; ctions)

#### SCHEDULE D (Form 990)

### Supplemental Financial Statements

OMB No. 1545-0047

Open to Public

Department of the Treasury Inspection Internal Revenue Service Employer identification number Name of the organization Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" to Form 990, Part IV, line 6. (a) Donor advised funds (b) Funds and other accounts Total number at end of year . . . . 1 Aggregate contributions to (during year) Aggregate grants from (during year) . Aggregate value at end of year . . . Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? Part II Conservation Easements. Complete if the organization answered "Yes" to Form 990, Part IV, line 7. Purpose(s) of conservation easements held by the organization (check all that apply). Preservation of land for public use (e.g., recreation or pleasure) ☐ Preservation of an historically important land area ☐ Protection of natural habitat ☐ Preservation of certified historic structure ☐ Preservation of open space Complete lines 2a-2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year. Held at the End of the Year Total acreage restricted by conservation easements . . . . . . . . . Number of conservation easements on a certified historic structure included in (a) . . . Number of conservation easements included in (c) acquired after 8/17/06 . . . . . . . Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the taxable year © Number of states where property subject to conservation easement is located ©

Does the organization have a written policy regarding the periodic monitoring, inspection, violations, and Staff or volunteer hours devoted to monitoring, inspecting, and enforcing easements during the year © Amount of expenses incurred in monitoring, inspecting, and enforcing easements during the year 9 \$ Does each conservation easement reported on line 2(d) above satisfy the requirements of section

Part III

Par	t III Organizations Maintaini	ng Collections	of Art, Histo	orical Treasure	es, or Other Similar A	Assets (continued)
3	Using the organization's accession items (check all that apply):	and other records	s, check any	of the following	that are a significant	use of its collection
а	Public exhibition		d	Loan or excl	nange programs	
b	Scholarly research		е	Other		
С	Preservation for future generat	ions				
4	Provide a description of the organization Part XIV.	ation's collections	s and explair	how they furthe	er the organization's ex	cempt purpose in
	During the year, did the organization sassets to be sold to raise funds rather	than to be mainta	ained as part	of the organization	on's collection?	
Par	Trust, Escrow and Custo Part IV, line 9, or reported	odial Arrangeme I an amount on I	e <b>nts</b> . Compl Form 990, P	ete if organizati art X, line 21.	on answered "Yes" to	) Form 990,
1a	Is the organization an agent, trustee included on Form 990, Part X?	e, custodian or ot	her intermed	iary for contribu	tions or other assets n	ot Yes No
					A	Amount
	Beginning balance					
	Additions during the year					
	Distributions during the year					
	Ending balance					
					• '	
Par	t V Endowment Funds. Con	mplete if organi	zation answ	vered "Yes" to	Form 990, Part IV, li	
		(a) Current year	(b) Prior ye	ar (c) Two year	rs back (d) Three years bac	ck (e) Four years back
	Beginning of year balance	174,758,444				
	Contributions	1,011,917				
	Investment earnings or losses .	-44,369,531				
	Grants or scholarships	1,806,850				
	Other expenditures for facilities					
	and programs	6,560,012				
	Administrative expenses	428,781				
	End of year balance					
2	Provide the estimated percentage of	•		S:		
а	Board designated or quasi-endowm	ent © 58	%			
b	Permanent endowment © 37	%				
	Term endowment © 5 %					
3a	Are there endowment funds not in the	e possession of th	ne organizatio	on that are held a	and administered for the	) Voc. No.
	organization by:					Yes No
	unrelated organizations					./
	If "Yes" to 3a(ii), are the related orga	anizations listed a	as required o	n Schedule R?		•
Par	t VI Investments—Land, Bu	ildings, and Fo	uipment	ee Form 990 F	Part X. line 10	
	Description of investment	(a) Cost or ot	her basis		(c) Depreciation	(d) Book value
		(investm	nent)			
			0	13,699,168		13,699,168
			0	308,138,669	74,950,089	233,188,580
			0	0	0	0
			0	27,359,988	23,187,197	4,172,791
			0	51,731,978	0	51,731,978

Total. Add lines 1a–1e. (Column (d) should equal Form 990, Part X, column (B), line 10(c).) . . . . . . . . . .

302,792,517

Schedule D (Form 990) 2008			Page 3
	I	I	
<b>Total.</b> (Column (b) should equal Form 990, Part X, col. (B) line 12.)			
Part VIII Investments—Program Relate	d. See Form 990, Part X,	line 13.	
(a) Description of investment type	(b) Book value	(c) Method of value Cost or end-of-year ma	ation:
		Cost or end-or-year ma	irket value
Total. (Column (b) should equal Form 990, Part X, col. (B) line 13.)			
Part IX Other Assets. See Form 990, Pa	rt X, line 15.		
	(a) Description		(b) Book value
Total. (Column (b) should equal Form 990, Part X, co	I (R) line 15 )	©	
Part X Other Liabilities. See Form 990,	Part X line 25		
(a) Description of liability	(b) Amount		
Federal income taxes	(7)		
	l .		

In Part XIV, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48.

Schedule D (Form 990) 2008 Page 4 Part XI Reconciliation of Change in Net Assets from Form 990 to Financial Statements 1 Total revenue (Form 990, Part VIII, column (A), line 12) . . . 209.136.168 2 2 Total expenses (Form 990, Part IX, column (A), line 25) . 3 -12,491,521 Excess or (deficit) for the year. Subtract line 2 from line 1 3 -55.505.990 4 4 Net unrealized gains (losses) on investments . . . 5 0 Donated services and use of facilities . . . 5 0 6 6 Investment expenses 7 0 7 Prior period adjustments . . . . . 8 8,366,862 Other (Describe in Part XIV) . . . . . Ջ 9 -47,139,128 Total adjustments (net). Add lines 4-8. Excess or (deficit) for the year per financial statements. Combine lines 3 and 9 10 Reconciliation of Revenue per Audited Financial Statements With Revenue per Return Part XII 106,546,167 Total revenue, gains, and other support per audited financial statements . . . 1 2 Amounts included on line 1 but not on Form 990, Part VIII, line 12: -55.505.990 a Net unrealized gains on investments . . . . . . 2b **b** Donated services and use of facilities . . . . 2c d Other (Describe in Part XIV) . . . -55.505.990 2e e Add lines 2a through 2d 3 Subtract line 2e from line 1 . . . . . . . . Amounts included on Form 990, Part VIII, line 12, but not on line 1: a Investment expenses not included on Form 990, Part VIII, line 7b 4b Other (Describe in Part XIV) . . . . 34,592,490 Add lines 4a and 4b 4c 34,592,490 . . . . . . . . . . . Total revenue. Add lines 3 and 4c. (This should equal Form 990, Part I, line 12.) 5 196,644,647 Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return 166,176,815 1 Total expenses and losses per audited financial statements . . . 1 2 Amounts included on line 1 but not on Form 990. Part IX. line 25: 2a 2b **b** Prior year adjustments . . . . . . . . . 2c c Losses reported on Form 990, Part IX, line 25 . . . d Other (Describe in Part XIV) . . . . . . 2e e Add lines 2a through 2d 166.176.815 3 Subtract line **2e** from line **1** . . . . . . . . . 3 Amounts included on Form 990, Part IX, line 25, but not on line 1: a Investment expenses not included on Form 990, Part VIII, line 7b 4a **b** Other (Describe in Part XIV) . . . . . . . 4b 42,959,353 42,959,353 Add lines 4a and 4b 4c Total expenses. Add lines 3 and 4c. (This should equal Form 990, Part I, line 18.) 5 209,136,168 Supplemental Information Part XIV Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X; Part XI, line 8; Part XII, lines 2d and 4b; and Part XIII, lines 2d and 4b. See Statement 7

Schedule D (Form 990) 2008

Schedule D (Forr	m 990) 2008	Page 5
Part XIV		
	The state of the s	

### SCHEDULE E (Form 990 or 990-EZ)

### **Schools**

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service

© Attach to Form 990 or Form 990-EZ.

lam	e of the organization Employe	er identification	n num	ber	
		Г			
1	Does the organization have a racially nondiscriminatory policy toward students by statement in it bylaws, other governing instrument, or in a resolution of its governing body?	I	1		
2	Does the organization include a statement of its racially nondiscriminatory policy toward student brochures, catalogues, and other written communications with the public dealing with student ad		2		
	programs, and scholarships?				
3	Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcaduring the period of solicitation for students, or during the registration period if it has no solicitation in a way that makes the policy known to all parts of the general community it serves? If "Yes describe. If "No," please explain	program,	3		
4	Does the organization maintain the following?				
а		[	4a		
			4b		
		-	4c		
			4d		
			5a		
			5b		
			5c		
			5d		
			5e		
			5f		

## Schedule F (Form 990)

### Statement of Activities Outside the United States

OMB No. 1545-0047

Open to Public Inspection

Employer identification number

Department of the Treasury Internal Revenue Service

Name of the organization Attach to Form 990. Complete if the organization answered "Yes" to
 Form 990, Part IV, line 14b, line 15, or line 16.

**52** Part I General Information on Activities Outside the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 14b. For grantmakers. Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award For grantmakers. Describe in Part IV the organization's procedures for monitoring the use of grant funds outside the United States. 3 Activities per Region. (Use Schedule F-1 (Form 990) if additional space is needed.) (a) Region (b) Number of (c) Number of (d) Activities conducted in (e) If activity listed in (d) is (f) Total offices in the region employees or region (by type) (i.e., a program service, expenditures in describe specific type of agents in fundraising, program services, region region grants to recipients located in service(s) in region the region) See Statement 10

Part II	Grants and Other Assista Part IV, line 15, for any rec	ince to Organizat cipient who receive	ions or Entities Out ed more than \$5,000.	side the United . Check this bo	d States. Comp ox if no one recip	s. Complete if the organization answered "Yes" to Formone recipient received more than \$5,000			
1	(a) Name of organization		(c) Region	(d) Purpose of grant	(e) Amount of cash grant	(f) Manner of cash disbursement	(g) Amount of non-cash assistance	(h) Description of non-cash assistance	(i) Method of valuation (book, FMV, appraisal, other)
									·

Schedule F (Form 990) 2008 Page 3 Grants and Other Assistance to Individuals Outside the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 16. Part III Use Schedule F-1 (Form 990) if additional space is needed. (f) Amount of non-cash (g) Description of non-cash (e) Manner of (h) Method of (c) Number of recipients (d) Amount of cash grant (a) Type of grant or assistance (b) Region valuation cash disbursement assistance (book, FMV, assistance appraisal, other)

Schedule F (Form 990) 2008 Page 4 Supplemental Information Part IV Complete this part to provide the information required in Part I, line 2, and any other additional information.

# SCHEDULE I (Form 990)

# Grants and Other Assistance to Organizations, Governments, and Individuals in the U.S.

OMB No. 1545-0047

Open to Public Inspection

Department of the Treasury Internal Revenue Service

Attach to Form 990.

Name of the organization

Employer identification number

Part I General Information on Grants and Assistance

Schedule I (Form 990) 2008 Page 2 Grants and Other Assistance to Individuals in the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 22. Part III Use Schedule I-1 (Form 990) if additional space is needed. (e) Method of valuation (book, (a) Type of grant or assistance (b) Number of (c) Amount of (d) Amount of (f) Description of non-cash assistance recipients cash grant non-cash assistance FMV, appraisal, other) See Statement 11 Supplemental Information. Complete this part to provide the information required in Part I, line 2, and any other additional information. See Statement 12

# SCHEDULE J (Form 990)

### **Compensation Information**

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

Attach to Form 990. To be completed by organizations that answered "Yes" to Form 990, Part IV, line 23. OMB No. 1545-0047
2008

Open to Public Inspection

Name of the organization

Department of the Treasury Internal Revenue Service

Employer identification number

Part I	Questions Regarding Compensa7 a3ndce1J	[(4)] TJETBT9 0 0 9 4.2 375.6 Tm[( )] TJETBT9 0 0 9 4.2	300.18

#### Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use Schedule J-1 if additional space is needed.

For each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that are not listed on Form 990, Part VII.

Note. The sum of columns (B)(i)-(iii) must equal the applicable column (D) or column (E) amounts on Form 990, Part VII, line 1a.

	(B) Breakdown of W-2 and/or			C compensation	(C) Deferred	(D) Nontaxable	(E) Total of columns	(F) Compensation	
(A) Name		(i) Base (ii) Bonus & incentive compensation		(iii) Other reportable compensation	compensation	benefits	(E) Total of columns (B)(i)–(D)	(F) Compensation reported in prior Form 990 or Form 990-EZ	
See Statement 13	(i)								
	(ii)								
	(i)								
	(ii)								
	(i)				 				
	(ii)								
	(i) (ii)								
	(i)								
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	(i)								
	(ii)								
	(i)				 				
	(ii)								

chedule J (Form 990) 2008
Part III Supplemental Information
complete this part to provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 4c, 5a, 5b, 6a, 6b, 7, and 8. Also complete this part
or any additional information.
See Statement 14

### SCHEDULE K (Form 990)

### **Supplemental Information on Tax-Exempt Bonds**

OMB No. 1545-0047

2008

Department of the Treasury Internal Revenue Service

Employer identification number Name of the organization LOYOLA UNIVERSITY MARYLAND INC **52** 0591623 Bond Issues (Required for 2008) (a) Issuer name (c) CUSIP # (b) Issuer EIN (d) Date issued (e) Issue price (f) Description of purpose Yes No Yes No A See Statement 15 Proceeds (Optional for 2008) Working capital expenditures from proceeds. . . Capital expenditures from proceeds . . . . . Year of substantial completion \_ \_ \_ \_ \_ \_ Yes No Yes No Yes No Yes No Yes No Were the bonds issued as part of a current refunding issue? Were the bonds issued as part of an advance refunding issue? Has the final allocation of proceeds been made? . . Does the organization maintain adequate books and records to support the final allocation of proceeds? Private Business Use (Optional for 2008) Part III Α В C D Ε Yes No Yes No Yes No Yes No Yes No Was the organization a partner in a partnership, or a member of an LLC, which owned property financed by 2 Are there any lease arrangements with respect to the financed property which may result in private business use?

OCHE	date 1. (1 6111 770) 2000										r uge •
Pai	rt III Private Business Use (Continued)										
			Α	E	3	(		ı	D	l l	E
22	Are there any management or service contracts with	Yes	No								
Ja	respect to the financed property which may result in										
	private business use?										
h	Are there any research agreements with respect to the										
	financed property which may result in private business										
	use?										
	Does the organization routinely engage bond counsel										
C	or other outside counsel to review any management or										
	service contracts or research agreements relating to										
	the financed property?										
4	Enter the percentage of financed property used in a										
4	private business use by entities other than a section										
	501(c)(3) organization or a state or local government ©										
5	Enter the percentage of financed property used in a private			1							
Э	business use as a result of unrelated trade or business										
	activity carried on by your organization, another section										
	501(c)(3) organization, or a state or local government ©										
6	Total of lines 4 and 5										
7	Has the organization adopted management practices										
,	and procedures to ensure the post-issuance										
	compliance of its tax-exempt bond liabilities?										
Pai	rt IV Arbitrage (Optional for 2008)										
	The straige (optional for 2000)		A	E	3	(	2				E
1	Has a Form 8038-T, Arbitrage Rebate, Yield Reduction	Yes	No								
•	and Penalty in Lieu of Arbitrage Rebate, been filed										
	with respect to the bond issue?										
2	Is the bond issue a variable rate issue?										
3a	Has the organization or the governmental issuer identified a hedge with respect to the bond issue on										
	its books and records?										
b	Name of provider										
	Term of hedge										
4a	Were gross proceeds invested in a GIC?										
	Name of provider										
С	Term of GIC										
d	Was the regulatory safe harbor for establishing the fair										
	market value of the GIC satisfied?										
5	Were any gross proceeds invested beyond an										
-	available temporary period?										
6	Did the bond issue qualify for an exception to rebate? .										

#### SCHEDULE L (Form 990 or 990-EZ)

### **Transactions With Interested Persons**

OMB No. 1545-0047

Department of the Treasury
Internal Revenue Service

Open To Public Inspection

Part II Loans to and/or From Interested Persons.

To be completed by organizations that answered "Yes" on Form 990, Part IV, line 26, or Form 990-EZ, Part V, line 38aof tax imposed on the

### **SCHEDULE M** (Form 990)

### **NonCash Contributions**

2008

OMB No. 1545-0047

Open To Public Inspection

Department of the Treasury Internal Revenue Service

© To be completed by organizations that answered "Yes" on Form 990, Part IV, lines 29 or 30.

Name of the organization Employer identification number LOYOLA UNIVERSITY MARYLAND INC 52 | 0591623 Part I Types of Property

		(a) Check if applicable	<b>(b)</b> Number of contributions	(c) Revenues reported on Form 990, Part VIII, line 1g	(d) Method of determining revenues
1	Art—Works of art				
2	Art—Historical treasures				
3	Art—Fractional interests				
4	Books and publications				
5	Clothing and household				
	goods				
6	Cars and other vehicles				
7	Boats and planes				
8	Intellectual property				
9	Securities—Publicly traded .	<b>V</b>	18	120,504	ir market value on date of
10	Securities—Closely held stock .				
11	Securities—Partnership, LLC, or trust interests				
12	Securities—Miscellaneous .				
13	Qualified conservation contribution (historic structures)				
14	Qualified conservation contribution (other)				
15	Real estate—Residential				
16	Real estate—Commercial				
17	Real estate—Other				
18	Collectibles				
19	Food inventory				
20	Drugs and medical supplies				
21	Taxidermy				
22	Historical artifacts				
23	Scientific specimens				
23 24	Archeological artifacts				
25	Other © ( Stmt 17				
26	Office (1.000000000000000000000000000000000000				
27					
28					
29	Number of Forms 0202 receive	al lave +le a av		ucor for contributions for	
29	Number of Forms 8283 receive which the organization complete				29 0
	which the organization complete	cu i 01111 02	.03, Fait IV, Dollee Acknov	vieugement	Yes No
20-	Design with a constant of the day of the constant of the const	_4!			
30a	During the year, did the organiz it must hold for at least three year.				
	used for exempt purposes for the	ha antira ha	nding period?	duon, and which is not req	uned to be
h	If "Yes," describe the arrangement				
31	Does the organization have a	gift acce	ptance policy that require	•	
32a	Does the organization hire or us			ns to solicit, process, or se	
	contributions?				· · · ·

Schedule M (Form 990) 2008 **Supplemental Information.** Complete this part to provide the information required by Part I, lines 30b, 32b, and 33. Also complete this part for any additional information.

# SCHEDULE O (Form 990)

### Supplemental Information to Form 990

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service

Name of the organization

Employer identification number

52 0591623

LOYOLA UNIVERSITY MARYLAND INC

See Statement 18

Schedule O (Form 990) 2008 Page 2 Name of the organization Employer identification number LOYOLA UNIVERSITY MARYLAND INC 52 0591623

#### **SCHEDULE R** (Form 990)

# **Related Organizations and Unrelated Partnerships**

OMB No. 1545-0047

(F)

Direct controlling

entity

Open to Public

Department of the Treasury Internal Revenue Service

**Identification of Disregarded Entities** 

(A)

Name, address, and EIN of disregarded entity

Part I

Attach to Form 990. To be completed by organizations that answered "Yes" to Form 990, Part IV, line 33, 34, 35, 36, or 37.

© See separate instructions.

(B)

Primary activity

(C)

Legal domicile (state

or foreign country)

(D)

Total income

(E)

End-of-year assets

Inspection Name of the organization Employer identification number 52 | 0591623 LOYOLA UNIVERSITY MARYLAND INC

Part II Identification of Related Tax-Exempt Organizations					
(A) Name, address, and EIN of related organization	<b>(B)</b> Primary activity	(C) Legal domicile (state or foreign country)	(D) Exempt Code section	(E) Public charity status (if section 501(c)(3))	<b>(F)</b> Direct controlling entity
For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for	Form 990.	Cat. No. 5	50135Y	Schedu	le R (Form 990) 2008

## Part III Identification of Related Organizations Taxable as a Partnership

<b>(A)</b> Name, address, and EIN of related organization	<b>(B)</b> Primary activity	(C) Legal domicile (state or foreign country)	(D) Direct controlling entity	<b>(E)</b> Predominant income (related, investment, unrelated)	<b>(F)</b> Share of total income	<b>(G)</b> Share of end-of-year assets	(F Dispropo alloca	ortionate	(I) Code V—UBI amount in box 20 of Schedule K-1 (Form 1065)	Gener mana partr	ral or aging
							Yes	No		Yes	No

## Part IV Identification of Related Organizations Taxable as a Corporation or Trust

(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)
Name, address, and EIN of related organization	Primary activity	Legal domicile (state or foreign country)	Direct controlling entity	Type of entity (C corp, S corp, or trust)	Share of total income	Share of end-of-year assets	Percentage ownership
See Statement 19							

## Part V Transactions With Related Organizations

Note. Complete line 1 if any entity is listed in Parts II, III, or IV.		Yes	No
1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II–IV?			
a Receipt of (i) interest (ii) annuities (iii) royalties (iv) rent from a controlled entity			
<b>b</b> Gift, grant, or capital contribution to other organization(s)	1b		
c Gift, grant, or capital contribution from other organization(s)			
d Loans or loan guarantees to or for other organization(s)	1.4		
	—		
e Loans or loan guarantees by other organization(s)			
f Sale of assets to other organization(s)	1f		
g Purchase of assets from other organization(s)			
h Exchange of assets	<u>1i</u>		
i Lease of facilities, equipment, or other assets to other organization(s)	'''		
j Lease of facilities, equipment, or other assets from other organization(s)	1j		
k Performance of services or membership or fundraising solicitations for other organization(s)			
I Performance of services or membership or fundraising solicitations by other organization(s)	11		
m Sharing of facilities, equipment, mailing lists, or other assets	<u></u>		
	<u>1n</u>		
n Sharing of paid employees			
o Reimbursement paid to other organization for expenses	10		
p Reimbursement paid by other organization for expenses			
P Reimbursement paid by other organization for expenses			
<b>q</b> Other transfer of cash or property to other organization(s)	1q		
r Other transfer of cash or property from other organization(s)			
2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and tra		thresho	olds.
(A) (B)		(C)	
Name of other organization(s)  Transaction		t involve	ed
type (a-r)			
(1)			
(2)			
(3)			
(4)			
(5)			
(6)			

## Part VI Unrelated Organizations Taxable as a Partnership

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

or gross revenue) that was not a related organization. See in  (A)	(B)	(C)		D)	(E)	1	F)	(G)	(1	(H)
Name, address, and EIN of entity	Primary activity	Legal domicile (state or foreign	Are all sec	oartners tion	Share of end-of-year	Disprop	ortionate itions?	Code V—UBI amount in box 20	Gene mana	eral or aging
		country)	501(c)(3) organizations?		assets			of Schedule K-1 (Form 1065)	partner?	
			Yes	No		Yes	No		Yes	No

Statement 1 : Activity Or Mission Description

Statement 2 : Program Service Accomplishments

Statement 3: Name Of Foreign Country Statement 4: The Books Are In Care Of Statement 5: Form990 PartVII SectionA Statement 6: Contractor Compensation

Statement 7: Schedule D - Supplemental Information

Statement 8 : Racially Nondiscriminatory Media Policy Explanation

Statement 9: Government Financial Aid Explanation

Statement 10: Accounts and Activities Outside the United States

Statement 11: Description of Grants and Other Assistance to Individuals in the United States

Statement 12: Description of Procedures for Monitoring the Use of Grant Funds in the United States

Statement 13 : Description of Individuals' Compensation

Statement 14 : Explanation of Questions Regarding Compensation

Statement 15: Bond Issues

Statement 16: Description of Business Transactions Involving Interested Persons

Statement 17: Description of Other Types of Property

Statement 18: Additional Information for Responses to Specific Questions for The Form 990 or Others

Statement 19: Description of Related Organizations Taxable as a Corporation or Trust

#### Statement 1

Form: 990 Page: 1

Line Number: Part I Line 1

#### **Activity Or Mission Description**

#### Description

Loyola University Maryland is a Jesuit Catholic university committed to the educational and spiritual traditions of the Society of Jesus and to the ideals of liberal education and the development of the whole person. Accordingly, the University will inspire students to learn, lead, and serve in a diverse and changing world.

Page: 2

Form: 990 Page: 2

Line Number: Part III Line 4a

### **Program Service Accomplishments**

Activity Code	Description	Expense	Grants	Revenue
	Education, General/Other: Research and development programs provided by the faculty and public service programs performed to benefit the public in general (6080 students)	\$3,438,186	\$0	\$0
	Higher Education: Instruction of 3716 full-time undergraduate students and 2364 full and part-time graduate students (6080 students).	\$107,540,174	\$42,959,352	\$152,790,928
	Student Services Programs: Providing academic and personal services to students (6080 students)	\$29,696,283	\$0	

Statement 3 LOYOLA UNIVERSITY MARYLAND INC
Form: 990 52-0591623

Page: 5

Line Number: Part V Line 4b

#### Name Of Foreign Country

#### Name

Belgium

United Kingdom (England, Northern Ireland, Scotland, and Wales)

Ireland Spain Thailand

Statement 4	LOYOLA UNIVERSITY MARYLAND INC

Form: 990 Page: 7

Line Number: Part VII Section A

#### Form990 PartVII SectionA

Name	Title	Hours	C1	C2	C3	C4	C5	C6	SectionA  Reportable Comp	Panartable Comp	Other Compensation
Name	Title	nours	Ci	CZ	CS	C4	Co	Co	From Organization	From RelatedOrgs	Other Compensation
Brian Linnane S	JPresident	50	Yes		Yes				\$0	\$0	\$0
Gerard Reedy SJ	Trustee	0.5	Yes						\$0	\$0	\$0
Kevin Keelty	Trustee	0.5	Yes						\$0	\$0	\$0
William Campbell SJ	Trustee	0.5	Yes						\$0	\$0	\$0
James Forbes	Trustee	0.5	Yes						\$0	\$0	\$0
W Bradley Bennett	Trustee	0.5	Yes						\$0	\$0	\$0
John R Cochran	Trustee	0.5	Yes						\$0	\$0	\$0
John M McNamara	Trustee	0.5	Yes						\$0	\$0	\$0
Louis Cestello	Trustee	0.5	Yes						\$0	\$0	\$0
Richard Hug	Trustee	0.5	Yes						\$0	\$0	\$0
Robert Kelly	Trustee	0.5	Yes						\$0	\$0	\$0
Beverly Burke	Trustee	0.5	Yes						\$0	\$0	\$0
John Paterakis	Trustee	0.5	Yes						\$0	\$0	\$0
James Sellinger	Trustee	0.5	Yes						\$0	\$0	\$0
Hans Wilhelmsen MD	Trustee	0.5	Yes						\$0	\$0	\$0
David Ferguson	Trustee	0.5	Yes						\$0	\$0	\$0
Edward Burchell	Trustee	0.5	Yes						\$0	\$0	\$0
Frank Bramble	Trustee	0.5	Yes						\$0	\$0	\$0
T Frank Kenned	yTrustee	0.5	Yes						\$0	\$0	\$0
M Cathleen Kaveny	Trustee	0.5	Yes						\$0	\$0	\$0
Sister Karen McNally RSM	Trustee	0.5	Yes						\$0	\$0	\$0
Gino Gemignani	Trustee	0.5	Yes						\$0	\$0	\$0
Jose Badenes SJ	Trustee	0.5	Yes						\$0	\$0	\$0
IH Hammerman	Trustee	0.5	Yes						\$0	\$0	\$0
Hugh Mohler	Trustee	0.5	Yes						\$0	\$0	\$0
Aine O'Connor RSM	Trustee	0.5	Yes						\$0	\$0	\$0
H Edward Hanway	Trustee	0.5	Yes						\$0	\$0	\$0
Sterling Pack	Trustee	0.5	Yes						\$0	\$0	\$0
Michael Tunney SJ	Trustee	0.5	Yes						\$0	\$0	\$0

Total:				\$2,715,184	\$0	\$436,560
Melanie McElvany	Programmer Analyst	37.5	Yes	\$165,750	\$0	\$0
James Patsos	Head Coach	50	Yes	\$268,195	\$0	\$24,967
Roger Kashlak	Professor	50	Yes	\$174,901	\$0	\$25,538
Lee Dahringer	Dean	50	Yes	\$247,588	\$0	\$30,861
Peter Lorenzi	Professor	50	Yes	\$174,037	\$0	\$29,287
James Buckley	Dean	50	Yes	\$176,696	\$0	\$25,301
Marc Camille	Vice President	50	Yes	\$212,129	\$0	\$32,610
Terrence Sawye	erVice President	50	Yes	\$215,129	\$0	\$34,569
Susan Donovan	Vice President	50	Yes	\$250,333	\$0	\$62,145
Michael Goff	Vice President	50	Yes	\$265,667	\$0	\$31,152
Timothy Snyder	Vice President	50	Yes	\$292,518	\$0	\$31,383
John Palmucci	Vice President	50	Yes	\$272,241	\$0	\$108,747
Statement 5				ı	OYOLA UNIVERSITY N	ANDVI AND INC

C1 = Individual Trustee Or Director

C2 = Institutional Trustee

C3 = Officer

C4 = Key Employee

C5 = Highest Compensated Employee

C6 = Former

Statement 6

Form: 990 Page: 8

Line Number: Part VII Section B

#### **Contractor Compensation**

Name and address:	Description Of Services	Compensation
Whiting-Turner Contracting PO Box 17596 Baltimore, MD 21297	Construction	\$18,305,487
Sodexo Inc and Affiliate PO Box 536922 Atlanta, GA 30353-6922	Food Service Operations	\$6,684,540
Merritt Properties LLC 2066 Lord Baltimore Drive Baltimore, MD 21244	Property Management	\$1,751,832
Follett Higher Education 3146 Solutions Center Chicago, IL 60677	Bookstore Operations	\$1,294,339
Sasaki Associates PO Box 843026 Boston, MA 02284	Architects	\$1,400,998
Total:		\$29,437,196

#### Statement 7

Form: Schedule D

Page: 4

Line Number: Part XIV

## Schedule D - Supplemental Information

Reference	Explanation
Schedule D, Part III, Line 4	The University owns several pieces of artwork which are on display for students.
Schedule D, Part V, Line 4	To help provide affordable education to students by providing funds for financial aid and support for the operations of the University.
Schedule D, Part XIII, Line 4b	Student Financial Aid
Schedule D, Part II, Line 9	Conservation easements are assigned no value on the balance sheet. The costs of maintaining the easements are estimated based upon the number of hours Loyola employees spend maintaining the related property.
Schedule D, Part X	Loyola has no liability for uncertain tax positions under FIN 48.
Schedule D, Part XII, Line 4b	Student financial aid of \$42,959,352; Endowment income designated for current operations of \$8,366,862
Schedule D, Part XI, Line 8	Endowment income designated for current operations of \$8,366,862

Statement 8 LOYOLA UNIVERSITY MARYLAND INC
Form: Schedule E 52-0591623

Page: 1

Line Number: Line 3

#### **Racially Nondiscriminatory Media Policy Explanation**

#### **Explanation**

The University displays the following on the Admissions section of the University's external website: "Loyola strongly believes in the principle of equal opportunity. The University admits students of any race, sex, religion, color, age, national and ethnic origin, to all the rights, privileges, programs and activities generally accorded or made available to students at the school. It does not discriminate on the basis of disability in admission or access to, or treatment or employment in, any of its programs and activities."

Page: 10

Statement 9 LOYOLA UNIVERSITY MARYLAND INC
Form: Schedule E 52-0591623

Page: 1

Line Number: Line 6

#### **Government Financial Aid Explanation**

#### **Explanation**

The Joseph A. Sellinger State Aid Program awards State aid to independent colleges and universities through a formula linked to their enrollment and to the per-student appropriation of selected four-year Maryland public institutions.

Page: 11

Form: Schedule F

Page: 1

Line Number: Part I Line 3

#### **Accounts and Activities Outside the United States**

		Offices	Employees	Total
Region	Central America and the Caribbean	0	0	\$62,575
Activities	Program Services			
Services	International study abroad			
Region	East Asia and the Pacific	0	2	\$1,214,601
Activities	Program Services			
Services	International study abroad			
Region	Europe (including Iceland and Greenla	nd) 2	6	\$3,295,632
Activities	Program Services			
Services	International study abroad			
Region	South America	0	0	\$16,484
Activities	Program Services			
Services	International study abroad			
Region	Sub-Saharan Africa	0	0	\$37,418
Activities	Program Services			
Services	International study abroad			
	Total:	2	8	\$4,626,710

Form: Schedule I

Page: 2

Line Number: Part III

### Description of Grants and Other Assistance to Individuals in the United States

		Number of recipients	Amount of cash grant	Amount of non-cash assistance
Type of grant Method of valuation Description of non-cash assistance	Athletic Scholarships Fair market value Financial aid	202	\$0	\$4,862,803
Type of grant Method of valuation Description of non-cash assistance	Resident Assistanceships Fair market value Financial aid	110	\$0	\$1,130,043
Type of grant Method of valuation Description of non-cash assistance	Graduate Assistanceships Fair market value Financial aid	111	\$0	\$302,739
Type of grant Method of valuation Description of non-cash assistance	Endowed Scholarships Fair market value Financial aid	147	\$0	\$727,350
Type of grant Method of valuation Description of non-cash assistance	Tuition Exchanges Fair market value Financial aid	106	\$0	\$1,687,657
Type of grant Method of valuation Description of non-cash assistance	Institutional Aid Fair market value Financial aid	1970	\$0	\$34,248,760

#### Statement 12

Form: Schedule I

Page: 2

Line Number: Part IV

### Description of Procedures for Monitoring the Use of Grant Funds in the United States

Reference	Explanation
Schedule I, Part I, Line 2	All financial aid is applied directly to students' outstanding receivable balances. No cash is physically transmitted.

Form: Schedule J

Page: 2

d 0 76

Line Number: Part II

**Description of Individuals' Compensation** 

52-0591623

Base Total Bonus and Other Deferred Nontaxable compensation incentive compensation compensation benefits (\$) (\$) compensation (\$) (\$) (\$)

Page: 15

LOYOLA UNIVERSITY MARYLAND INC 52-0591623

Form: Schedule J

Page: 3

Line Number: Part III

## **Explanation of Questions Regarding Compensation**

Reference	Explanation	
Schedule J, Part I, Line 1a		

Statement 15 LOYOLA UNIVERSITY MARYLAND INC 52-0591623

Form: Schedule K

Page: 1

Line Number: Part I Column (a)

**Bond Issues** 

		Issue Price
ssuer Name	MHHEFA	\$62,995,000
1	Loyola College in Maryland Series 2006A	
ssuer EIN	52-0591623	
CUSIP#	574217VU6	
Date Issued	01/04/2006	
Description Of Purpose	Capital projects	
Defeased	No	
On Behalf Of Issuer	No	
ssuer Name	MHHEFA	\$11,000,000
!	Loyola College in Maryland Series 2007	
ssuer EIN	52-0591623	
CUSIP#	5742174Y8	
Date Issued	12/06/2007	
Description Of Purpose	Capital projects	

#### Statement 16

Form: Schedule L

Page: 1

Line Number: Part IV

#### **Description of Business Transactions Involving Interested Persons**

		Amount of transaction
Name	Whiting Turner - Gino Gemignani	\$18,305,487
Relationship with organization	Senior Vice President	
Description of transaction	Construction	
Sharing Of Revenues	No	
Name	Bank of America- James Forbes	\$700,552
Relationship with organization	Managing Director	
Description of transaction	Banking services	
Sharing Of Revenues	No	

#### Statement 17

Form: Schedule M

Page: 1

Line Number: Part I Line 25-28

### **Description of Other Types of Property**

		lines on Part I	Contributions	Revenues
Description	Miscellaneous equipment	Yes	229	\$389,940
Method of determining	Fair market value			
revenues				

Form: Schedule O

Page: 1

Line Number: ScheduleO

### Additional Information for Responses to Specific Questions for The Form 990 or Others

Reference	Explanation	
Form 990, Part VI, Section A, Line 10	Prior to filing, the Form 990 is reviewed by the Vice President of Finance, the Audit Committee and an independent tax accountant at KPMG. After approval from the Audit Committee, all members of the Board of Trustees are provided an electronic copy of the Form. The Form is filed after all comments from the Board of Trustees have been addressed.	
Form 990, Part VI, Section B, Line 15	An independent search consultant was retained for each search. This person assisted in the setting of an appropriate salary and considered the position responsibilities and the market. Salary data of comparable AJCU (Association of Jesuit Colleges and University) institutions was used in the determination of the salary range. Annually, salaries are reviewed based on a job analysis, market conditions, and performance.	
Form 990, Part VI, Section B, Line 12c	Each Board member is required to complete and file with the Secretary of the University, on or before September 1 of each year, information about possible beneficial or adverse interests affecting Loyola University Maryland, including interests of immediate family members and organizations in which the Board member (or member of his or her family) has a significant management function or significant ownership interest. University administrators are required to act in ways consistent with their fiduciary responsibilities to the University. If a University administrator believes that he or she may have a conflict of interest, the administrator shall promptly and fully disclose the conflict to the President of the University and shall refrain from participating in any way in the matter to which the conflict relates until the question has been resolved. The President shall consult with the University counsel regarding all conflict questions of which he is informed and shall report regularly to the Board of Trustees regarding any unresolved conflict questions.	
Form 990, Part VI, Section C, Line 19	The University includes the audited financial statements and Form 990 on the external website.  Governing documents and the conflict of interest policy are not available to the general public, but are available to the Board of Trustees, upon request.	

#### Statement 19

Form: Schedule R

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### **Description of Related Organizations Taxable as a Corporation or Trust**

		Share of total income	Share of end-of- year assets	Percentage ownership
Name, address and EIN	Radnor Realty Company	\$3,031	\$176,989	100%
	4501 North Charles Street			
	Baltimore, MD 21210			
	520851542			
Primary activity	Real Estate			
State or foreign country	MD			
Direct controlling entity				
Type of entity	С			