



FUDAN FUZHONG
OVERSEAS FOUNDATION

2013 Annual Report

April 12, 2014
Scarlatto, New York, NY



Content

www.fdfzalumni.org

Continue your Fuzhong legacy

- Executive Summary
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- Donors



Executive Summary

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- FY 2013 is the seventh year of the Foundation since our inception
- With our continuous effort as well as the support from our alumni and friends, we delivered strong results for 2013
 - Achieved record high in total fundraising
 - Stratified the need-based scholarship to deploy resource more efficiently
 - Coordinated with the school and re-opened our Student Resource Center at Fuzhong
- The road ahead of us in 2014 remains challenging
 - Discontinuation of a major fundraising channel, Long Feifei summer camp, losing about 40% of revenue
 - Various new initiatives that will bring the operation of the Foundation to a new scale and level
- Facing the challenge, the leadership of the Foundation is optimistic
 - A new energetic Board was elected in February this year
 - A strong capable Executive Committee was appointed
 - Continuous support from the school, our alumni and friends



Financial Statement¹ as of Dec. 31st, 2013

Income Statement

Income items	2013	2012	YoY
Individuals Donations	23,778	24,193	-2%
Summer Camp	30,700	22,724	35%
Amazon Referral	285	446	-36%
Corporate Matching	1,280	348	268%
Interest Income	112	607	-82%
Total Donations	56,155	48,318	16%
Grants	(14,755)	(13,107)	13%
Expense	(3,907)	(5,844)	-33%
Net	37,493	29,367	28%

Balance Sheet

	2013	2012
Total Assets	160,356	123,527
Total Liabilities²	5,072	509
Net Assets	155,284	123,018

1 Financial statement is reported on a cash accounting basis; all units in USD; Fiscal year starts on January 1st and ends on December 31st every year

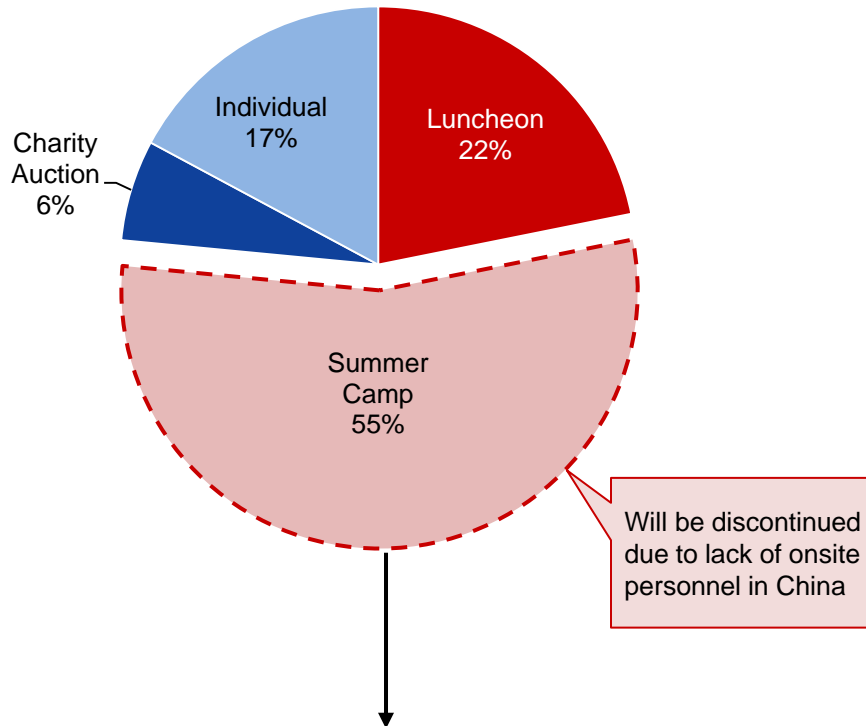
2 The significant increase in Total Liabilities are driven by a change in our accounting for the committed deployment of the second installment of 2013 "Give A Hand" Wang Jialian Scholarship

1 Fundraising

Fundraising Summary – FY 2013

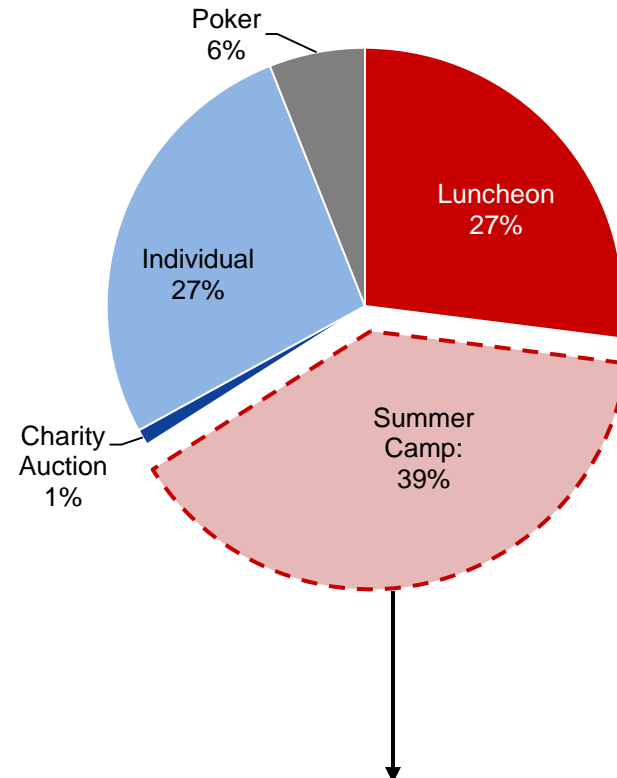
2013 summary

Total fundraising = \$56,155



Fundraising since inception

Total lifetime fundraising = \$275,311



The Summer Camp will discontinue in 2014 – the Foundation will expand fundraising through other channels to offset the revenue drop



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Spring luncheon

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Long Feifei Summary Camp Will Discontinue in 2014

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In-kind charity auction Vacation Stays at Four Seasons

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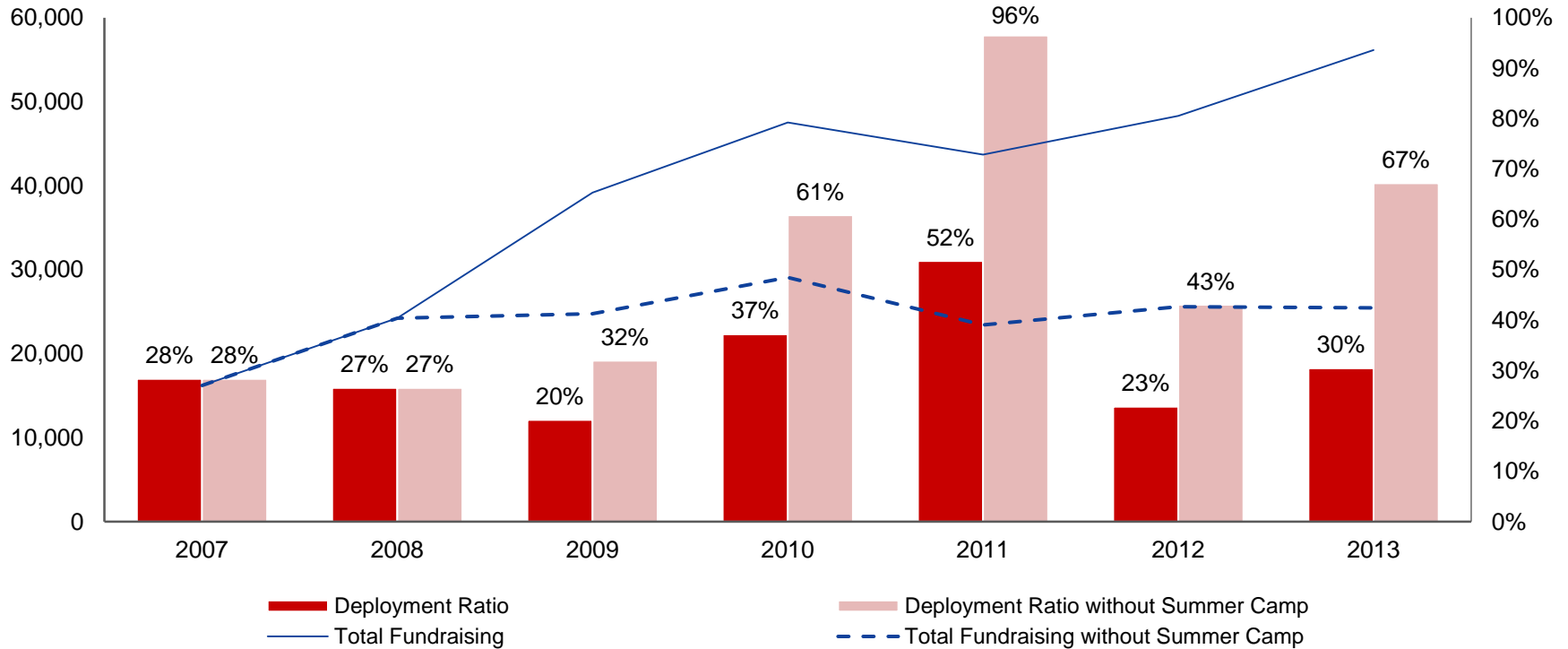




Seven years of track record

Seven-year fundraising record and deployment ratio

With and without Long Feifei Summer Camp



Without the summer camp, we are facing significant challenge to support our fund deployment initiatives, maintaining and enhancing our scholarships at Fuzhong



How you can help

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- Cash / Check
 - General purpose
 - “Give-a-hand” Wang Jialian Need Based Scholarship
- Pledge
- Online donation: fdfzalumni.org/donate
- Corporate Matching
- In-kind
 - Example: Vacation stays at Four Seasons Private Residence
- Shop on Amazon through our referral link: fdfzalumni.org/amazon
- Other potential cooperation projects

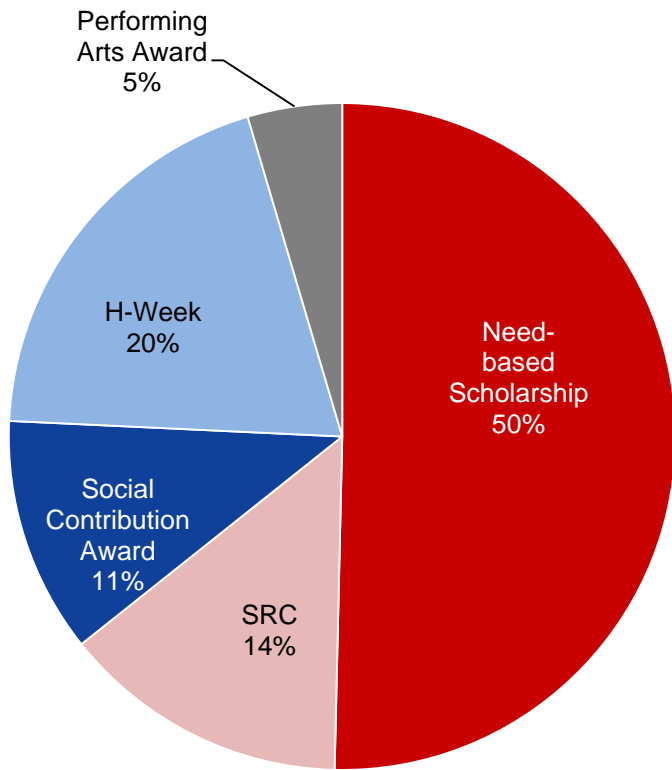
2 | **Fund Deployment**



Fund Deployment Summary

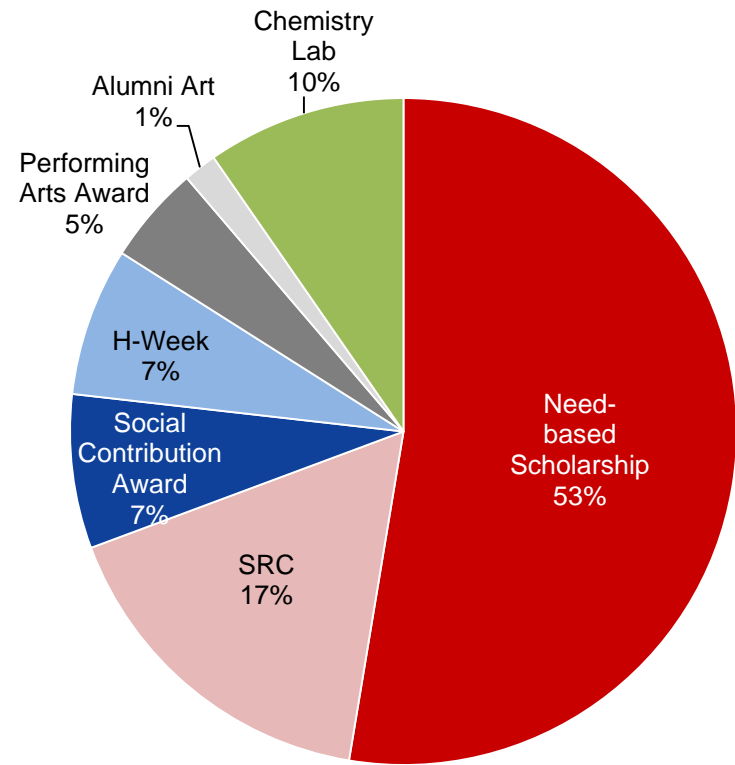
2013 summary

Total deployment = \$14,755



Deployment since inception

\$'000, Cumulative deployment = \$89,317

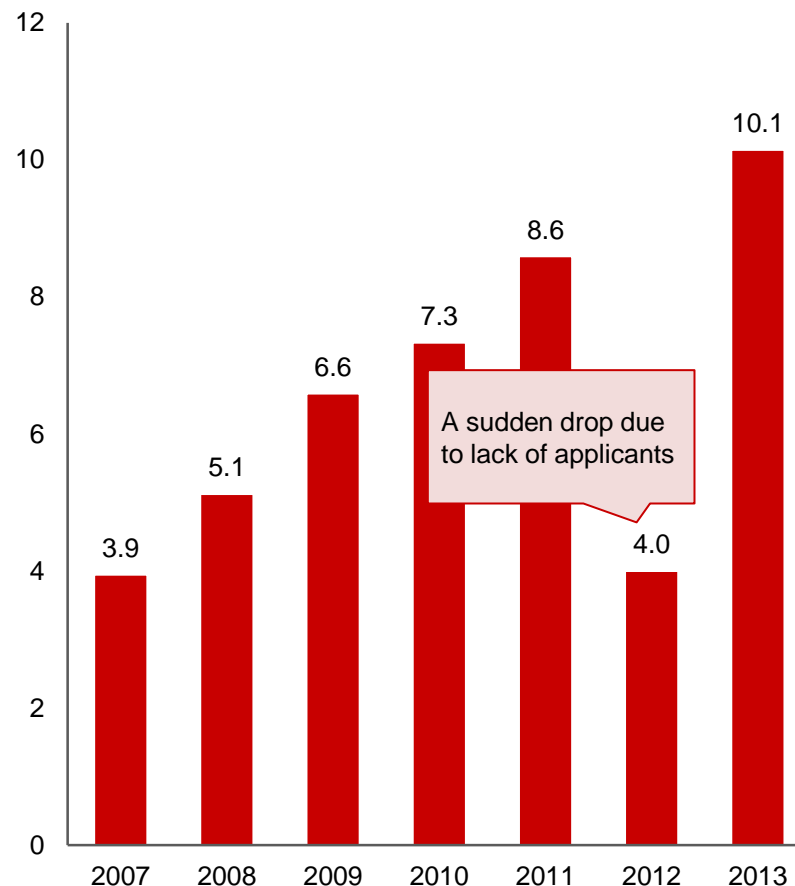


Updates on the scholarship

- Need-based Scholarship
 - Sponsored by Sun Juemin and his classmates in class of 1979-3
 - Honoring Ms. Wang Jialian, the homeroom teacher of the class
- Stratified award
 - CNY 3,000
 - CNY 5,000
 - CNY 7,000
- Enhanced marketing towards Tibetan students
 - 4 Tibetan receipts in 2013

Historical deployment

In \$'000, reported on a commitment basis



- “王家琏助学金对我而言有很大的帮助，不仅减轻了家里的负担，而且给了我很大的鼓励。我将这笔款项绝大多数用于家中的开支，并且购买了自己所需的书籍。在你们的帮助，我表示由衷的感谢与庆幸。或许时间的流逝并不是把什么都带走了，它抚平了我们的心，教会我们平静中所孕育的，其实是幸福，最平淡朴实的同样是最真挚的。感谢所有帮助过我的人，用平凡缔造真诚。或许太过华丽的辞藻我无法说出，但我希望您能感觉到我的真诚。”
——高二 刘同学
- “对于农民来说，天气就是他们的命。如果天气不好，就意味着他们辛苦大半年的这一切都将白费，而我家土地只有5亩，却恰是如此。……由于母亲身体不适，家中没有稳定的收入，父亲一个人在外打工的钱不够用来供家中的开销，在加上要担起家中三个孩子的生活费用，我二妹放弃了她求学的机会，帮父母做农活。……在家的时间，我都努力着为他们做点事，现在离开了家，我更应该为他们做点，替他们分担点。因此，我希望你们能给予我最大的帮助，我也会在接下来的时间里好好学习，不辜负你们对附中学子所寄托的希望。”
——高一 某西藏同学
- “去年和前年我已成功申请得到王家琏助学金，这对于我及家庭来说都是一个不小的帮助。不论是对于平时的学费、在课外上的竞赛辅导班还是日常的生活、学习用品，这都大大减轻了家庭的压力，给我的学习及生活提供了支持与动力。母亲的收入仅能够使我们应付日常的开销，因此这笔助学金也就显得更加有帮助。今年暑假期间我通过学校的名额参加了北京大学举办的高中生体验营活动。我想，若不是校友们的这份帮助，也许在不算低的参加的费用面前，我可能会更加犹豫是否抓住这个机会。因此，我的学业上的任何进步和突破都离不开校友们的功劳。”
——高三 陈同学

RMB 63,000
(11 Recipients)



Social Contribution Award (7th Year)

- 7 Applications (5 from student groups)
- Award winning applications
 - **Connecting students in Shanghai with children in rural area; organizing donation drives on campus**
 - **Setting up student volunteer networks across Shanghai to bring entertainment to children under pediatric care**
- Other applications
 - Visiting and caring for children suffering from leukemia
 - Volunteering for FDFZ alumni association
 - Promoting environmental protection, animal caring and community service on campus
 - Organizing extracurricular activities for students in public elementary schools in Shanghai
 - Visiting rural regions to provide education enrichment

RMB 5,000 × 2
(2 recipients)



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Social Contribution Award (7th Year)

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Performing Arts Award (6th Year)

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- 11 Applicants
- Winners
 - **Piano / music composition**
 - **Clarinet**
- Other applicants
 - Saxophone
 - Trombone
 - Percussion
 - Dancing
 - Choir

RMB 2,000 × 2
(2 students)



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Re-opening of the Student Resource Center Additional Book Donation Arranged in Summer 2013

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- After the renovation of the 旦华楼, Student Resource Center (知缘阁, SRC) is re-opened on the third floor of the building
- The Foundation organized another round of book donation in the summer of 2013
 - Broadens the book collection scope from classics to all major subject areas (including Arts, History, China Study, Politics, etc.)
 - Increased the total imported book collection at SRC from 150 to 250+

RMB 12,000
(100+ books)



H-Week (2nd Year)

- Week-long immersion program at Harvard University
 - Each participating high school students shadows a Harvard freshman for a week to experience undergrad campus life
- Two Fuzhong students were interviewed, selected and sponsored by the Foundation
 - CHEN Ruijing
 - TANG Xinyao
- Former President JIANG Fanghua conducted on campus interviews
- EC Member HUANG Yuxiao (FDFZ '08, Columbia '13, Harvard Ph.D. '18) met the two students on campus and took them out for dinner
- Post trip essays and photos from the students can be browsed on our [website](#)



RMB 17,000
(2 students)

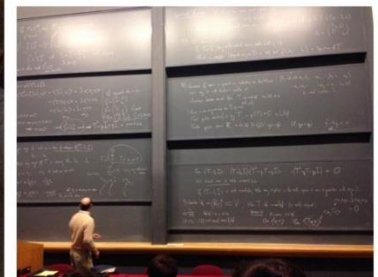
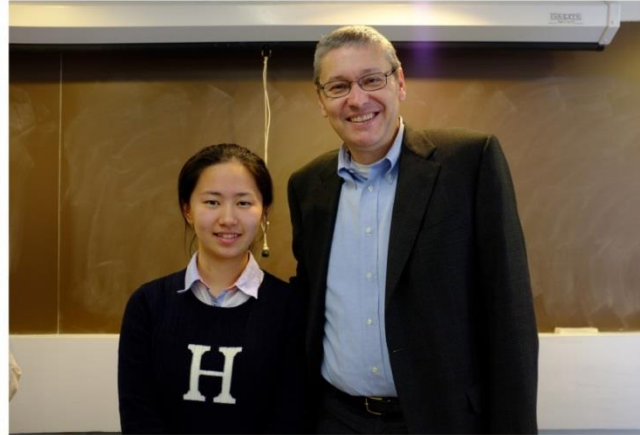


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H-Week (2nd Year)

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3 | **Alumni and School Relations**



Liaise and Cooperation with Fudan Fuzhong

- Well-developed mutual trust and cooperation with Fuzhong on campus publicity and fund deployment
 - Coordination with Fuzhong on award/scholarship publicity (e.g. Give-A-Hand publicity among Tibetan students)
 - Distribution of welcome letters to incoming Fuzhong students from the Foundation
 - Coordination on logistics for in-kind donations for the SRC
- Frequent communications with Fudan Fuzhong over various channels
 - Three in-person EC level meetings with Fuzhong administration in 2013
 - Current project review
 - Needs from the school
 - Prospects on new initiatives
 - Numerous calls / emails / WeChats with school administration on project coordination
- Contribute one page to every quarterly issue of the *Alumni Communication* (校友通讯) published by the school



Alumni Immigration Seminar

- Immigration seminar on US green card policy
 - Presented by attorney Owen Gu from Zhang & Associate
 - 2-hour long, information-filled seminar
- Upon popular request by alumni
- Topics covering
 - Overview of qualifications fit for a green card application
 - Academic excellence
 - Professional achievements
 - Investments in the US that creates job opportunities
 - Process for each of the above
 - Detailed Q&A session
- Presentation slides on FFOF [website](#)



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Alumni Immigration Seminar

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Summer Picnic

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613 alumni in database **29** US states

14 countries

2 annual social events in NYC

50 postcards mailed to major donors
around the world



www.facebook.com/FudanFuzhongOverseasFoundation



weibo.com/dfzoverseas



WeChat ID: **dfzoverseasfndn**

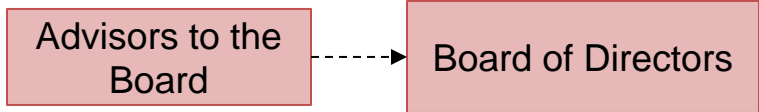


4 | **New Team**

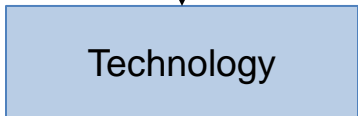
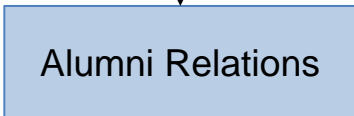
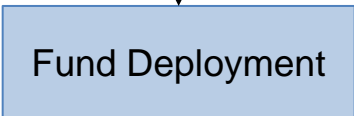
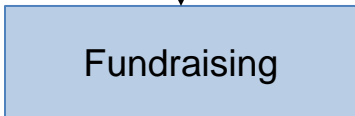


An Updated Organizational Structure – A New Team

- **Fanghua Jiang ('84)**
- **Hongguo He ('96)**
- **Weijia Sun ('98)**
- **Jennifer Ni ('90)**
- **Yongchun Wu ('79)**



- **Ling Liu ('88)** – Co-chair of the Board
- **Minhua Zhang ('00)** – Co-chair of the Board
- **Di Wu ('02)**
- **Hang Qian ('06)** – Secretary
- **Yilun Shi ('07)** – Treasurer



- **Hang Qian ('06)**
- **Zheheng Shi ('07)**
- Chengjie Shen ('00)
- Qiuyu Julia Xu ('01)
- Rundong Doris Ke ('08)

- **Di Wu ('02)**
- **Hang Qian ('06)**
- Mengxing Lin ('09)

- **Yuxiao Huang ('09)**
- **Qizhao Susan Weng ('09)**
- Di Wu ('02)
- Chu Zheng ('05)
- Rundong Doris Ke ('08)

- **Ye Zhou ('96)**
- **Hai Shang ('06)**



FUDAN FUZHONG OVERSEAS FOUNDATION

Most Recent Alumni Communication by the School Featuring the Leadership Transition at the Foundation

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校友故事 校友通讯 编辑:15届 陈晓桐,陈睿勤 2014年3月15日

刘翎 董事会成员

●工作经历

国泰财富基金, 2004 - 至今; 董事总经理
摩根士丹利, 1998 - 2004; 副总裁
德勤咨询, 1994 - 96; 高级咨询顾问
安德逊咨询(现为安信哲), 1992 - 94; 咨询顾问



●教育背景

工商管理学硕士, 哥伦比亚大学商学院, 美国纽约州纽约市 (1998)
工商管理学学士, 纽约州立大学 Albany 分校, 美国纽约州 Albany 市 (1992)
St. Andrew's School, 美国特拉华州 (1988)
复旦附中, 中国上海 (1987)

张敬华 董事会成员

●工作经历

SAC Capital LLC, 2008 - 至今, 基金经理, 分析师
DE Shaw & Co., 2005 - 2008; 交易员



●教育背景

物理和数学学士, 哈佛大学, 美国麻省剑桥 (2005)
Sidwell Friends School, 美国华盛顿特区 (2001)
复旦附中, 中国上海 (2000)

吴笛 董事会成员

●工作经历

V.rde Partners, 2010 - 至今; 投资分析师
Lazard Fr è res & Co, 2006 - 2010; 经理



●教育背景

数学硕士, 数学和经济学学士, 弗吉尼亚大学, 美国弗吉尼亚州夏洛茨维尔市 (2006)
复旦附中, 中国上海 (2002)

钱行 董事会成员

●工作经历

麦格咨询, 2011 - 至今; 副经理



●教育背景

经济学, 数学学士, 达特茅斯学院, 汉诺威, 新罕布什尔州 (2011)
复旦大学, 中国上海 (2007)
复旦附中, 中国上海 (2006)

施轸伦 董事会成员

●工作经历

安永, 2012 - 至今; 审计



●教育背景

会计学硕士, Vanderbilt 大学 (2012)
经济学学士, Yale 大学 (2011)
复旦附中 (2007)
Sidwell Friends 高中 (2006)

董事会和执行委员会



复旦附中海外基金会 新一届董事会介绍

复旦附中海外基金会(以下简称“基金会”)成立于2006年,是由五位当时在纽约工作的附中校友一起成立的非营利机构,于美国康州注册。基金会致力于联系更多海外校友,支持附中教育项目的发展。

基金会于2014年2月初举行了成立七年来第一次董事会换届选举。选举产生的新一届五位董事会成员分别是:刘翎'87、张敬华'00、施轸伦'07、吴笛'02和钱行'06(有关董事会成员的照片和简介请见附件1)

新的董事会于2月8日在美国康州召开了近五个小时的第一次会议,并于2月21日召开了一次三小时的电话会议,对过去的工作进行了逐一回顾和总结,对将来工作的重心进行了规划部署:

1. 加强与学校定期的、全方位的双向沟通和联系。新任的董事会成员将轮流定期与学校交流基金会每季度的工作
2. 增强执行委员会部门职能,采取联席领导制。基金会新的成员结构详见附件2
3. 扩充投资项目。将于3月15日全国队会议上讨论可能扩充的投资项目
4. 拓宽筹资来源

我们希望开展更多不同类型的活动吸引更多校友,通过不同渠道筹得更多资金。具体的项目将先在筹资部内部进行讨论,并将于3月15日与各部门及董事会讨论。

5. 设立董事会顾问团。在上一届的董事会和执行委员以及很多为基金会出谋划策的校友中,有很多校友和志愿者在基金会的工作经验值得我们借鉴学习,所以我们将聘请他们中的一些作为董事会的顾问。我们正在逐个联系中,希望他们能接受我们的聘请。

6. 设立青年校友干事团队。基金会的发展离不开青年校友,尤其是刚从附中毕业活跃在北美各大大学校园里的优秀附中校友。我们将在校友关系部门下设立青年校友干事团队,鼓励年轻的校友尽早地参与开展基金会的各项活动。

7. 撰写并传递常规工作流程指南。正值新老执行委员会的交接之际,我们希望上一届的执行委员会成员能将所有的常规项目和活动整理成文字,以便平稳系统地交接给下一届。

以上是一些重点的工作计划。我们希望基金会能为母校的发展尽绵薄之力,也为遍布全球的热心校友提供一条反馈和回报母校的有效渠道。

Projects in China

Scholarships - \$13,000

- May: Social Contribution
- Oct: Give A Hand
- Nov: H-Week
- Nov: Performing Arts

Student Resource Center - \$3,000

- Jul: Book donation
- Dec: Maintenance and update

New Initiatives - \$2,000

- Jun: Summer Reading List
- Sept: Teaching Excellence Award

Events/initiatives in the US

Alumni Socials and Events - \$4,000

- Mar: Luncheon
- Jul: Summer Picnic
- Sept: Charity Auction
- Oct: Alumni Networking
- Nov: Karaoke

On-going Initiatives

- Social Media Connection
- Alumni Career Services
- Updates on Alumni News Letter

If you want to volunteer at the Foundation, please contact: info@fdfzalumni.org

5 | **Donors**



Special “Thank You” to 2013 Donors

Tianyin Shi† (1984)	Yuan Mei† (1999)	Ye Zhou† (1996)	Yueping Liu (2001)
Juemin Sun† (1979)	Yinlei Yu† (1994)	Yongchun Wu† (1980)	Zhijun Xu (2000)
Xinghai Fang† (1981)	Chunhua Wei† (2003)	Di Wu (2002)	Xintong Le (2008)
Minhua Zhang† (2000)	Henry Zhou† (1987)	Hai Shang (2006)	Wan Yu (1982)
Hao Zhang† (1996)	Hang Chen† (2006)	Keiko Hira (1982)	Wenlong Wang (2000)
Ling Liu† (1988)	Tianhong Ying (1997)	Adam Bao	Yilun Shi (2007)
Robert Wang†	Keith Chen† (1980)	Chengjie Shen† (2000)	Danfeng Wu (2008)
Weijia Sun† (1998)	Jennifer Ni† (1990)	Chenjie Yuan (2000)	Rong Fan (1996)
Hongguo He† (1996)	Lin Zhao	Keyue Gao (2009)	Weiqi Zhang (2005)
Hang Qian† (2006)	Panying Chen (1980)	Ya'ir Aizenman	

Note:† indicates a member of Heritage Society