



# RockValleyCollege FOUNDATION

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Throughout the late night study sessions, exams and projects,  
YOU stood by our students with your support and generosity.  
Through their hugs, thumbs up and jumps for joy at reaching their goals,  
THEY thank you for believing in them and their dreams.



Thanks to your partnership throughout the 2016 academic year:

- \$290,000 in scholarships were awarded to deserving students;
- \$188,000 in programmatic grants were awarded for RVC academic and continuing education initiatives;
- 1,290 students graduated in May and will move ahead in their career and educational journeys as a stronger and more skilled employee or student.

For all of these milestones and more,  
we thank you for your continued support and  
belief in RVC and its mission.

You make us a better place to learn and grow.

**THANK YOU!**



**Rock Valley College**  
**FOUNDATION**



October 31, 2018

Mr. Fname Lastname  
Company  
Company Engineering Scholarship  
Address  
City, State Zip code

Dear Fname,

You impacted a life today. Thank you!

Through your generous support of scholarships at Rock Valley College, a student has been given the opportunity to take one step closer to their dreams and future careers. Your gift has also served as a testament to your belief in that student's journey and aspirations. Thank you for giving the priceless gift of an education.

Kelvin is this year's recipients of the **Company Engineering Scholarship**. We hope the following pages will give you a glimpse into your recipient's educational path, interests and goals.

It is because of you and your fellow scholarship donors, the RVC Foundation was able to award 218 students with 263 scholarships for the 2018 fall and 2019 spring semesters. Although each recipient's story is unique, all share a common desire to better their lives through a quality education. For many of our recipients, your scholarship dollars played a crucial role in their ability to afford and attend college. Again, we thank you.

All that we are able to accomplish within the RVC Foundation begins with, and is made possible by **YOU**. You make us a stronger Foundation, College, and community, and for that we are deeply grateful.

Proud to work alongside of you,

Name  
Title  
Rock Valley College Foundation

## **Company Engineering Scholarship**

**Student name - City**

**2018-19 school year award:  
\$amount**

Student's Scholarship Application Personal Statements:

A scholarship from Rock Valley College Foundation is important to me because it gives me a sense of recognition for the hard work I have been putting in school. I am a first generation student and the oldest of my 3 siblings. I was the first of my family to graduate from high school and I'm modeling to my parents and siblings how to be successful in college. Being a role model for them is very important to me. My hope is for all us to have college degrees that will benefit our family and community.

Achieving my ultimate goal as an engineer will lead me to the latter path of my success, because I know I will still have much to learn and accomplish once I have earned the degree and position. Additionally, I am a Rockford Promise Scholarship student and it provides some financial relief; however, it aids with tuition and student fees only (\$125/credit), but I need help with books and additional fees.

It is a relief and feels rewarding I can go to school without having to worry so much about student loan debt. Receiving a scholarship would also be very relieving for my parents as well. They recently came out of a heavy credit card debt and do not have additional dollars to support me in college. This caused them to put in many extra hours to pay off different bills, leaving not much for them to enjoy for quite some time. My parents had rough childhoods in Mexico. They came to the United States for a better life. I have to take advantage of what they have set up for me. All of their hard work has been for my siblings and I. I am on the path to success and excelling in school is my way of saying thank you to them. I am fortunate enough to have opportunities that they did not have back in the day. I have the opportunity of becoming very successful and I plan on carrying that on with my family in the future.



During this school year I almost changed my major to Pre-med. After speaking with my parents and professional mentor I have decided to continue with Engineering. After I earn my Associates in Engineering degree I plan to attend the NIU Engineering program. As a scholarship recipient, I am grateful and will gladly serve as an ambassador to Rock Valley College. I would need approximately \$800 to cover book costs and any additional fees. Your consideration is greatly appreciated.

I am in my second year as an AES degree seeking student. I plan to graduate from RVC in Spring 2019 and attend NIU's Engineering Program in Fall 2019.

*Thank you!*

Dear Mr. [REDACTED] and Mr. [REDACTED]

I would like to thank you very much for choosing me as a recipient for the [REDACTED] Engineering Scholarship. I cannot thank you enough for supporting me on this path to becoming an engineer. Thanks to your generosity, I will be able to continue my studies without having to worry about paying for my post-secondary education! As the oldest of five children, it is very difficult for me to receive a lot of financial assistance from my parents, resulting in a lot of stress as I must find ways to pay for my education. I am currently employed at the Rockford Country Club as a busser, however paying for school off that is very difficult.

In terms of the future, I plan on obtaining my Associates of Science from Rock Valley College and then transfer to UIC to become obtain my Bachelors of Science in Mechanical Engineering. By doing this, I will have become the first person in my family to attend and graduate from college, which is a big deal for everyone in my family. After finishing college, I would love to come back to Rockford and have an impact on the development of this city.

I thank you again for supporting me on my path to become an Engineer!

Sincerely,

[REDACTED]



## STEWARDSHIP REPORT



Date

Mailing Address

Dear Donor Name,

You are part of the future. You are helping to open doors and create opportunities for students who are prepared to meet today's challenges and go on to become the world's next generation of visionary leaders. In appreciation of your commitment to Puget Sound students and ongoing dedication to the college, I am pleased to share with you the 2018–19 update on the status of the Stewarded Fund Name Scholarship.

As you know, a Puget Sound education extends well beyond the classroom. Students are a part of an immersive educational environment that inspires students to find their voices, to learn with and from each other, and to develop lifelong bonds with peers, faculty, coaches, and mentors. These experiences along with access to a rigorous curriculum, numerous experiential learning and research opportunities, and extracurricular activities, ensure that our students are prepared for the future. They develop the confidence to discover and establish their careers, passions, and ways to make an impact in their communities.

Thank you very much for your investment in talented students and the type of education they receive at Puget Sound. We hope you enjoy the enclosed information and that you will be able to join us on Date for the annual scholarship luncheon to visit with our students and to see first-hand the impact you are making on their lives.

Sincerely,

Rebecca C. Harrison '01  
Director of Donor Relations and Campaign Programs

Enclosures

OFFICE OF DONOR RELATIONS

1500 N. Warner St. #1011 Tacoma, WA 98416-1011 [pugetsound.edu/giving](http://pugetsound.edu/giving)

### Stewarded Fund Name 2018–2019 Report

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#### FINANCIAL SUMMARY

*As of June 30, 2018*

Fair Market Value	\$XXX,XXX
Amount distributed	\$X,XXX

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#### 2018–2019 SCHOLARSHIP RECIPIENTS

*In 2018–2019 the Stewarded Fund Name was awarded to:*

- Student Name '20, from Los Angeles, California, mathematics major and Spanish minor





# Creating and Serving the Future

2017-18 PRESIDENT'S REPORT



UNIVERSITY of  
**PUGET  
SOUND**





Anna Marchand '19, Kaela Hamilton '20, and Assistant Professor of Biology Carrie Woods measure the abundance of organisms on a nurse log. The group spent three weeks in the Olympic National Park conducting research on the forest canopy. Read about their research on forest branches and fallen logs, along with many other stories about Puget Sound students, faculty, and alumni, at [pugetsound.edu/stories](https://pugetsound.edu/stories).






## **What the world needs now is you:**

people committed to making possible a liberal arts education that provides students with the inspiration, curiosity, discipline, and resources to become the world's next generation of visionary leaders. Thanks to your generosity, Puget Sound has deepened our academic offerings, created new internship and experiential learning opportunities, provided more life-changing scholarships and financial aid to bright and talented young people, and welcomed an ever more diverse range of scholars from across the country and around the globe. I continue to be humbled by the extraordinary dedication of all members of this community, and the ways in which you enable us to fully live our responsibility to meet the needs of our students and confront with creativity the issues of the times in which we live. On the following pages, you will find examples of what your support has made possible in the past year, and the seeds it has sown to ensure our students' success in the months and years to come.

I hope to see you in the coming year, both on campus and at events around the country, as we set the stage for delivery of a forward-looking strategic plan that will guide this great university to new heights of distinction and success.

Isiah Crawford  
President



A student wearing a blue lab coat and a grey baseball cap is focused on using a pipette in a laboratory setting. The background is dark with blue lighting, and several other pipettes are visible hanging from above. The student's hands are steady as they work.

# A visionary approach to higher education

Experiential learning is at the center of teaching and learning at Puget Sound. Incorporating interdisciplinary learning, hands-on research, internships, community engagement, and international exchange, a Puget Sound education engages learners in direct experience and focused reflection about what they are learning and how to put it to use. This personal and transformational process increases knowledge, promotes critical analysis, develops skills, clarifies values, and expands students' capacity to contribute to their communities.

Working in the wet lab in Weyerhaeuser Hall, Caleb Van Boven '19 creates a cocktail of antibodies that will be pipetted onto a muscle tissue sample.

**17/18**  
HIGHLIGHTS

Puget Sound was again named one of *Forbes'*  
"Best Value Colleges."



## **RISE program launched**

Puget Sound's new Reflective Immersive Sophomore Experience (RISE) program combines classroom sessions with summer internships to offer students the opportunity to connect their liberal arts education to an off-campus career environment. The RISE program also helps students build knowledge about career paths and move confidently toward life after graduation. In the spring 2018 pilot, 70 RISE students interned with 13 different industries, including health care, finance, science, technology, youth development, and government.



## **Mellon grant propels experiential learning**

The Andrew W. Mellon Foundation awarded University of Puget Sound \$800,000 to implement a transformative strategy that will ensure all undergraduates take part in meaningful, high-impact learning experiences. The four-year Engaging High Impact Experiences grant carries forward recent Puget Sound work to create and pilot new internship models and to implement experiential educational practices across the curriculum.

**"Because RISE is developed with a framework rooted in reflection and self-discovery, students are empowered to identify their strengths, define their goals, and explore how to connect their academic learning in a high-quality experience that links them to a local, national, or international community. This integrated, high-impact approach to learning effectively prepares our students to lead in an evolving world."**

**RENEE HOUSTON**, associate dean for experiential learning and civic scholarship

27 incoming students received the Tacoma Public Schools Commitment financial aid package. Launched in 2015, the package meets the full demonstrated financial need of select local high school graduates.

Puget Sound was named among the 2017 **Best College Values** by *Kiplinger's Personal Finance* magazine and earned a spot in the 100 best-value private liberal arts colleges.

Both the *Wall Street Journal* and *Times Higher Education* named Puget Sound among the top 100 liberal arts colleges in the United States.





## 17/18 HIGHLIGHTS

Puget Sound students studied in Argentina, Australia, Austria, Brazil, Canada, Chile, China, Costa Rica, Czech Republic, Denmark, England, France, Germany, Greece, Guatemala, Hungary, India, Ireland, Italy, Japan, Madagascar, Malaysia, Mexico, Mongolia, Morocco, Namibia, Netherlands, New Zealand, Nicaragua, Russia, Scotland, Serbia, South Africa, South Korea, Spain, Switzerland, Taiwan, Tanzania, Thailand, Turks and Caicos, Uganda, and Vietnam.



# Looking to the East

Puget Sound's commitment to the interdisciplinary study of Asian societies and economics has been cultivated over many decades of strategic investment, robust scholarship, and relationship-building.

## New chair will bolster the study of China at Puget Sound

Puget Sound announced the establishment of the Suzanne Wilson Barnett Chair of Contemporary China Studies in May 2018. Made possible by a generous gift from The Trimble Foundation, the creation of the endowed faculty position is a major step in Puget Sound's ability to serve as a center for excellence in the study of contemporary China.

The position is named for Professor Emerita of History Suzanne Wilson Barnett, who taught at Puget Sound from 1973 to 2007, and was a central figure in the launch of the Asian Studies Program more than 40 years ago.

**"Our scholarly interactions with Asia are already at a high level, with faculty exchange programs, research trips, our Pacific Rim study abroad program, culture and language studies in Chinese and Japanese, and the Asian field schools that provide a myriad on-site experiential-based learning opportunities. The new chair will help to carry these efforts forward and prepare our students for potential international careers or for service at home, underpinned by a solid understanding of contemporary China."**

**KRISTINE BARTANEN**, provost

## PacRim: A study abroad journey unlike any other

Every three years, Puget Sound's Pacific Rim Program sends a group of students on a nine-month journey through Asia. Twenty-five students made the incredible journey through the Pacific Rim in 2017–18. They began in Moscow, took the trans-Siberian railroad to Mongolia, and then studied in South Korea, Japan, China, Taiwan, Hong Kong, Singapore, Malaysia, Thailand, and India.



**"During a visit to Tiananmen Square in Beijing, I got to, in the same day, stand where Mao had proclaimed the founding of the People's Republic of China, and stand in the exact spot an activist I had studied was arrested during the massacre in 1989. After taking a class on campus about the history of class consciousness and rebellion in China, we got to see the National Museum of China and see China's version of its own embattled history."**

**KYLE CHONG '17** (top right)

Recently established by Reid Champagne to honor his late wife's spirit of travel, the Carolyn Kay Marquardt 'Go See Stuff' Endowed Travel Fund supports enhanced study abroad experiences for students.

The Asian/Pacific Islander Identity Endowed Scholarship was created in 2017 by members of the Asian/Pacific Islander Collective and the Asian student community to alleviate financial barriers to higher education for Asian/Pacific Islander students.

10 students and recent graduates were awarded prestigious national scholarships and fellowships. The awards included three Fulbright English Teaching Assistantships, a Spanish Government Teaching Assistantship, a Watson Fellowship, and others.

# Lifelong connections

## Alumni help students create the future

Students are encouraged to learn about careers related to their fields of study throughout their years at Puget Sound. This often affirms the academic and cocurricular courses students are charting. Occasionally, it prompts them to recalibrate with ample time to explore alternative fields and sectors.

Alumni are invaluable resources in this wayfinding process. Through programs like the Business Leadership Mentor Program, ASK (Alumni Sharing Knowledge) Night, and Take a Logger to Work Day, Puget Sound graduates provide current students with insight, access, and mentorships that connect them to transformative experiences and prepare them for life after college.



**"I received a rich and unforgettable Puget Sound education. I believe there is a distinctiveness to a Puget Sound education, and alumni play a significant role in that experience. I give back to ensure other Loggers receive just as rich of an educational experience as I did."**

**T'WINA (FRANKLIN) NOBLES '06, M.A.T. '07**, president and CEO, Tacoma Urban League, secretary, Alumni Council

**"I had the privilege of working with two Puget Sound students from the Business Leadership Program, starting their sophomore year, through graduation. What started as professional development preparation evolved into good friendships and holistic philosophical conversations about what it means to live life with compassion and service to the community."**

**ELLIOT STOCKSTAD '98, M.Ed. '04**, chief development officer, Lutheran Community Services Northwest

**"I love meeting the students and hearing about all the interesting and fascinating research they are doing, and their plans for the future. The job-shadow experience is part of their career development process, and alumni play such a pivotal role in that."**

**ANDREA (TULL) DAVIS '02**, director of government and external relations, Coordinated Care Health Plan, president, Alumni Council

## In 2017–18, Puget Sound students interned at more than 350 businesses, nonprofits, and public agencies all over the world, including:

Alaska Airlines	Cultural Heritage Agency of the Netherlands	New York State Senate	Senator Amy Klobuchar
Alchemy Skateboarding	Degrees of Change	Nisqually Land Trust	Spaceworks Tacoma
Amazon	Democratic Party of Oregon	Nordstrom	Stanford University Athletics
American Cancer Society	Discovery Institute	Northwest Immigrant Rights Project	Sub Pop Records
American Friends Service Committee	Earth Economics	<i>Northwest Travel &amp; Life Magazine</i>	Sultan Qaboos Cultural Center
AmeriCorps	EFILM Digital Laboratories	Oakland Raiders	<i>Swimming World Magazine</i>
ArtBarn Community Theatre	Emergency Food Network	OMBA Arts Trust, Namibia	Tacoma Art Museum
Asian Health Services	Federal Reserve Board	Oregon Department of Consumer and Business Services	Tacoma Community House
Bayonet Records	Fidelity Investments	Paramount Pictures	Tacoma Little Theatre
Berkeley Lab	Good Food Foundation	Peninsula School District	Tacoma Musical Playhouse
Blue Wave Political Partners	Gordon Thomas Honeywell	Pierce Conservation District	Tacoma-Pierce County Health Department
Boys & Girls Club of South Puget Sound	Governmental Affairs	Pierce County AIDS Foundation	Tacoma/Pierce County Habitat for Humanity
Breakthrough Silicon Valley	Hawaii Department of Health	Pierce County Auditor	Tacoma Public Schools
Broadway Center for Performing Arts	History Colorado	Pierce County Center for Dialogue and Resolution	The Arc Minnesota
Brookhaven National Laboratory	HIT Lab NZ	Pierce County-Tacoma Chamber of Commerce	The Geneva Foundation
Buffalo Soldiers Museum	Idaho Conservation Corps	Point Defiance Zoo & Aquarium	The Grand Cinema
California Department of Fish and Wildlife	Internet Intelligence House Nordic	Port of Oakland	The Ritz London
California State Senate	International Joint Commission	PROMO Missouri State's Equal Rights Advocacy	U.S. Department of State
Camp Fire of Puget Sound	Illinois Housing Development Authority	Providence Row	United Way of Pierce County
Cato Institute	Innovative Giving Enhancement	Rebuilding Hope! Pierce County Sexual Assault Center	University of Buenos Aires
Center for Gender and Refugee Studies	Institute of Noetic Sciences	Russell Investments	University of Oregon Athletic Department
Charles Wright Academy	Governor Kate Brown	San Diego Museum of Man	Washington Environmental Council
Children's Hospital Colorado	Kids Empowerment	<i>San Francisco Magazine</i>	Washington State Department of Corrections
Children's Museum of Tacoma	Kitsap Bank	Seattle Children's Research Institute	Washington State Department of Revenue
CIAL (Instituto de Investigación en Ciencias de la Alimentación)	Local First Arizona	<i>Seattle Met Magazine</i>	Washington State Legislature
City of Berkeley	Los Angeles City Attorney	Seattle Sounders FC	Western International Securities
City of Seattle	Lost in Frenchlation	Seattle Theatre Group	Western State Hospital
City of Tacoma	Madrid Network		World Trade Center Tacoma
Colorado Ocean Coalition	Make-A-Wish Hawaii		Young Chicago Authors
Colorado State Public Defender	Mercedes-Benz Arena Shanghai		YWCA Pierce County
Columbia Bank	Milwaukee Brewers		
Congressman Derek Kilmer	MIND Research Institute		
Congresswoman Diana DeGette	Mother Earth Farms		
Congressman Mike Thompson	Multicare Health System		
Conservation Northwest	MyBrainSolutions		
	NASA Jet Propulsion Laboratory		
	National Council on U.S. - Arab Relations		





Welcome Center Rendering



Southeast Asia Symposium

## A selection of 2017–18 highlights and achievements

### MAJOR GIFTS AND GRANTS

#### Welcome Center

The Tom and Meg Names Family Foundation pledged \$1 million toward the construction of a new Welcome Center to receive prospective students, their families, and other campus visitors.

#### National Science Foundation

Puget Sound behavioral ecologist Stacey Weiss and microbiologist Mark Martin received a \$731,000 grant from the National Science Foundation to research the habits of egg-laying lizards.

#### The Center for Speech and Effective Advocacy

Arthur Vining Davis Foundations awarded Puget Sound a \$250,000 grant to help establish the Center for Speech and Effective Advocacy.

### EVENTS AND PERFORMANCES

#### Fourth Annual Southeast Asia Symposium

Students and professors spent two days in collaboration and dialogue focused on the intersections of culture and sustainability in Indonesia and throughout Southeast Asia.

#### Washington State Supreme Court

Washington's highest court heard three cases in Schneebeck Concert Hall, offering Puget Sound students a front-row seat to the judicial process.

#### Society of Composers Inc. National Conference

Fifty-seven composers gathered at Puget Sound for three days of classical music theory, fellowship, and performance.

#### *Into the Woods*

The production of the Tony-winning musical was one of more than 140 student performances throughout the year.

#### Earth Week

Students, staff, and faculty hosted a Sustainability Expo, launched a sustainable paper campaign, and produced a wide variety of events.

### GUEST SPEAKERS

A robust series of visiting artists, scholars, and lecturers included:

**Robert Gates**, former U.S. secretary of defense

**Sally Jewel**, former U.S. secretary of the interior

**Charles Johnson**, National Book Award-winning author and cartoonist

**N. Scott Momaday**, Pulitzer Prize-winning novelist and scholar

**Eddie Moore Jr.**, founder and program director for the White Privilege Conference

**Maxine Williams**, Facebook global director of diversity



Eddie Moore Jr.





Washington Supreme Court



Commencement Speaker Sally Jewel and President Crawford

## SCHOLARSHIP

**Roger Allen**, physical therapy, received the Puget Sound President's Excellence in Teaching Award.

**Michael Benveniste**, English, won a Graves Award in the Humanities.

**Jan Leuchtenberger**, Asian studies, was awarded the Dirk Andrew Phibbs Memorial Research Award.

**Mark Martin**, biology, received the 2018 Carski Foundation Distinguished Undergraduate Teaching Award.

**Nicholas Navin '19** presented at the Society for Applied Anthropology annual meeting.

**Rosie Rushing '19** presented at the American Chemical Society annual meeting.

**Renee Simms**, African American studies, was named one of the National Endowment for the Arts Creative Writing Fellows.

**Heather Rose Stegman '19** presented at the Western Psychology Association annual meeting.



Kelli Callahan

## COMMUNITY ENGAGEMENT

**Dexter Gordon**, African American studies and communication studies, received the Martin Luther King Jr. Community Service Award from the City of Tacoma.

Puget Sound's student chapter of **Habitat for Humanity** built a tiny house for the homeless and donated it to the Low Income Housing Institute.

About 20 students volunteered at the **Tacoma Moon Festival**, an annual event presented by the Chinese Reconciliation Project Foundation.

Sixty fifth-grade students spent a day on campus as part of **"McCarver Day."** The goal of the visit was to create a visible pathway to college for kids from Tacoma's Hilltop neighborhood.

Puget Sound continued to partner with **Graduate Tacoma**, a local nonprofit that seeks to increase the graduation rate of Tacoma Public Schools students.

## ATHLETICS

Our 23 NCAA Division III teams gave it their all both on and off the field. More than 100 student-athletes were named Northwest Conference (NWC) Scholar Athletes. The football team's trip to China was another highlight of the year, providing opportunities to gain international experience, play an exhibition game, and lead youth clinics on a nine-day tour of the country. Individual Logger achievements include:

**Kelli Callahan '20**, women's swimming, was named NWC Co-Swimmer of the Year and won conference titles in three events.

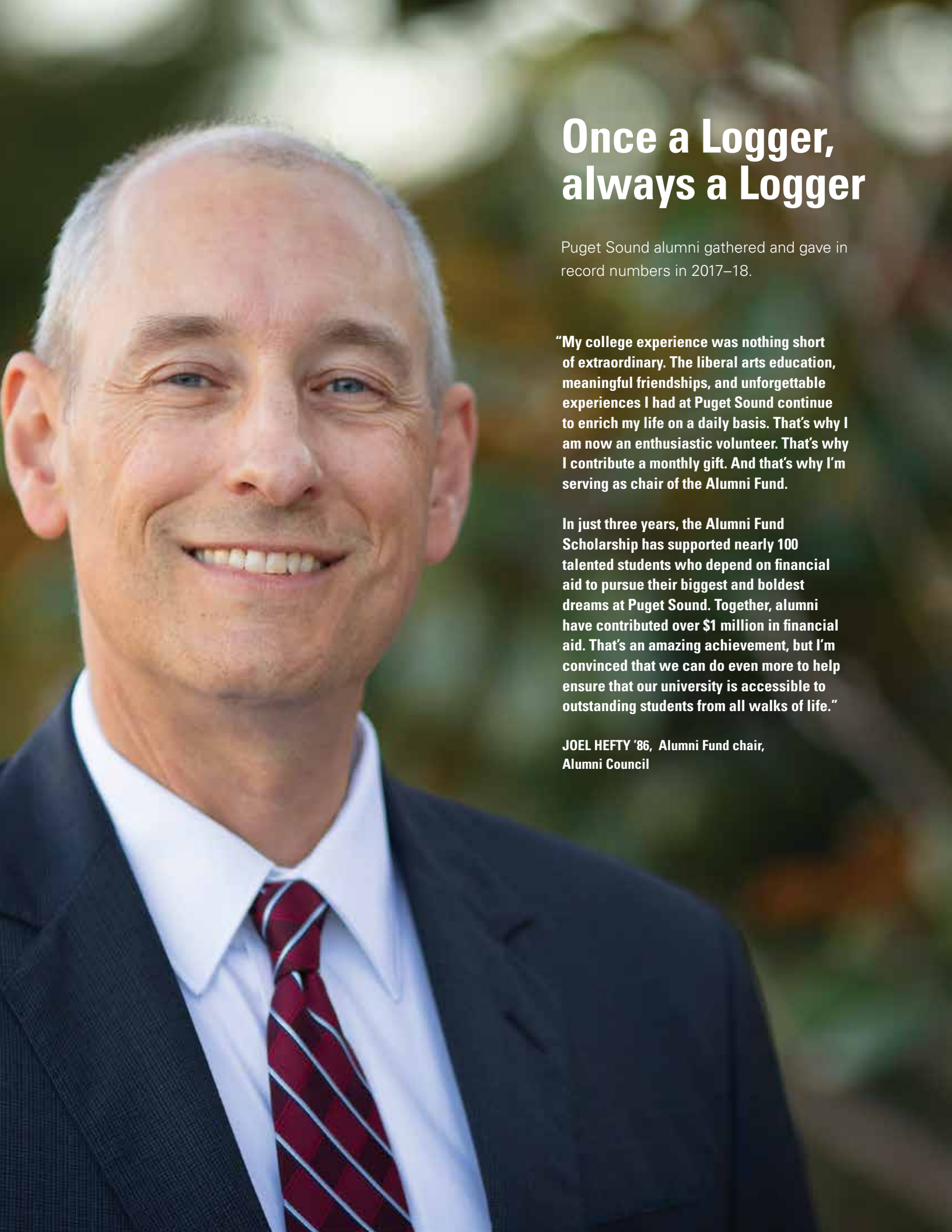
**Jessica Gott '18**, softball, was an Academic All-American and second team All-Conference.

**Jamie Lange '19**, women's soccer, was named NWC Defensive Player of the Year.

**Samantha Schaffer '21**, women's cross country, was awarded NWC Freshman of the Year.

**Matt Wells '20**, track and field, was recognized as West Region Men's Indoor Track Athlete of the Year.

**Jimmy Wohrer '19**, men's basketball, set the school record for 3-pointers in a season (104) and was named first team All-Conference.



# Once a Logger, always a Logger

Puget Sound alumni gathered and gave in record numbers in 2017–18.

**"My college experience was nothing short of extraordinary. The liberal arts education, meaningful friendships, and unforgettable experiences I had at Puget Sound continue to enrich my life on a daily basis. That's why I am now an enthusiastic volunteer. That's why I contribute a monthly gift. And that's why I'm serving as chair of the Alumni Fund.**

**In just three years, the Alumni Fund Scholarship has supported nearly 100 talented students who depend on financial aid to pursue their biggest and boldest dreams at Puget Sound. Together, alumni have contributed over \$1 million in financial aid. That's an amazing achievement, but I'm convinced that we can do even more to help ensure that our university is accessible to outstanding students from all walks of life."**

**JOEL HEFTY '86, Alumni Fund chair,  
Alumni Council**





Alumni reconnected during Summer Reunion 2018.

## Logger Day Challenge

On March 20, 2018, more than 600 Puget Sound alumni, parents, and friends raised \$75,000 during the inaugural Logger Day Challenge, a one-day online giving event held in celebration of the university's 130th anniversary. More than 100 class gift agents led the charge, building excitement among their classmates in creative ways. In preparation for their 20th reunion in June, members of the Class of 1998 hosted a "virtual reunion" on their class Facebook page.

Gifts made during the Logger Day Challenge supported the university's growing Alumni Fund Scholarship program, among other priorities. The second cohort of Alumni Fund Scholarship recipients included 29 students from across the country.



**Save the date  
for next year's  
Logger Day Challenge:  
March 26, 2019.**

## Celebrating milestone reunions

Nearly 800 alumni gathered on campus June 8–10, 2018 to celebrate their connections to the college and each other. Class volunteers planned a weekend full of exciting events, including an evening on the town, a family-friendly afternoon picnic, and engaging classes during Alumni College. Each year, classes also enjoy a friendly competition to see who can raise the most in support of Puget Sound students. This year, the Class of 1968 took home the gold, with 17 percent of the class contributing to the 2017–18 Alumni Fund.

Special events were held to celebrate the Nijenrode exchange program and the 30th anniversary of the Business Leadership Program.

**Save the date for Summer  
Reunion Weekend 2019:  
June 7–9.**



**"The students who receive alumni scholarships really appreciate what you've done for us. Many of us come from families who can't afford tuition. By supporting us, you're really supporting the next generation. Financial aid and scholarships cover about half of my tuition. Without it, I would have missed out on all of my opportunities at Puget Sound."**

**MASON QUINLAN '20 is a business major, co-captain of the men's baseball team, a member of Phi Delta Theta fraternity, and an Alumni Fund Scholarship recipient.**



# Thank you.

**Your generosity enables  
Puget Sound to offer a  
world-class education  
to world-changing  
young leaders.**



In support of our commitment to sustainability, recognition of individual donors (and more Puget Sound stories) can be found on our website.

**[pugetsound.edu/annualreport](https://pugetsound.edu/annualreport)**

Username: donor

Password: loggersgiveback

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OFFICE OF THE PRESIDENT  
1500 N. WARNER ST. #1011  
TACOMA, WA 98416-1011

**FSC Mark**



# LEADER SHIP

Leadership for a changing world.

UNIVERSITY OF  
PUGET SOUND  
2016–17  
PRESIDENT'S  
ANNUAL REPORT





The  
world  
is  
calling  
us.



**T**oday, more than ever, the world is in need of leadership. A Puget Sound liberal arts education, in particular, prepares students to anticipate and respond to challenges known and unknown, to be agents of change and to think clearly, to bridge disciplines and divides, and to develop solutions to complex problems. Solutions that will benefit those on our campus, in our communities, and around the world.

All of the stories on these pages—about dreams brought to life, ambitions realized, passions discovered—begin with you, and are made possible by your support.

Your generous contributions are inextricably linked not only to the success of our students, but to the lives they go on to transform.

Thank you.

**ISIAAH CRAWFORD, PRESIDENT**

# Designing an education for today and tomorrow.

A Puget Sound education isn't something you get. It's something you do. We provide immersive educational experiences, paired with active reflection, that prepare students to be effective global citizens and to engage in meaningful work both during and after their college careers.



## Discovering a Passion

Puget Sound offers many opportunities for students to engage in internships, field research, and travel. Nearly 90 students conducted summer research on topics ranging from the economic value of sustainability to perceptions of women political candidates. Thanks to generous gifts from donors, many students receive research stipends for their work and are able to live on campus for the summer.

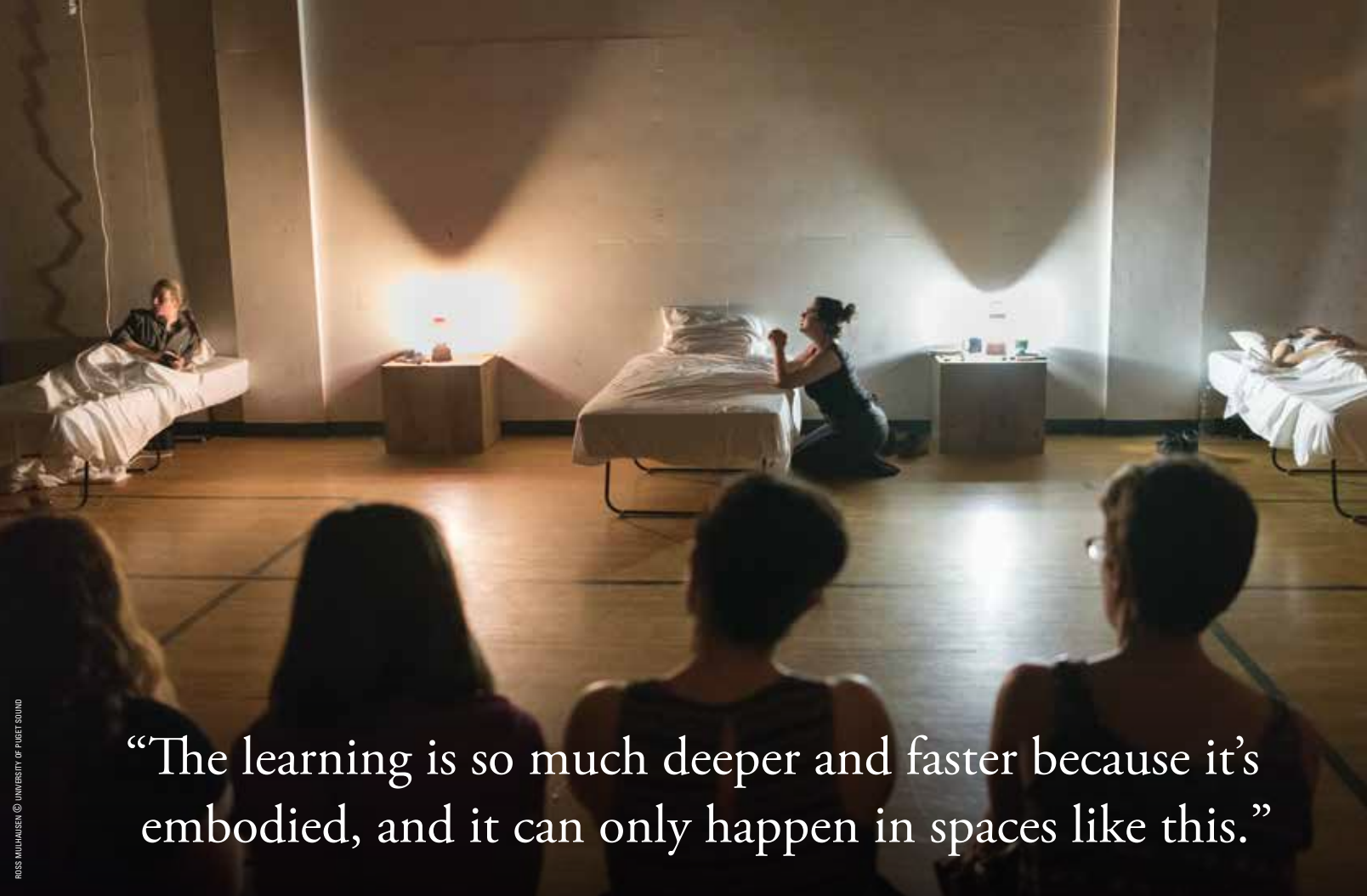
“I spent my summer suspended in a tree. As a student researcher in the Woods Lab, I got to collect moss samples, survey bryophyte species, and hang lines in the canopy as part of my fieldwork in the Hoh Rainforest on the Olympic Peninsula. Every day was challenging and exciting.

I worked hard to earn this opportunity. In the spring I took a research class that guided me through writing an extensive grant proposal, guided by professors who genuinely wanted me to succeed. It has been an incredible experience to design my own research project and to learn from biology professor Carrie Woods, an expert in the field of epiphyte community ecology.

Amidst the focus of the work and the adrenaline of the climbing, I felt another emotion—belonging. This is what I want to do for the rest of my life.”

**MCKINLEY NEVINS '18**

**Hear from more students about their summer internships and research at [pugetsound.edu/annualreport](https://pugetsound.edu/annualreport).**



“The learning is so much deeper and faster because it’s embodied, and it can only happen in spaces like this.”

### Extending the Classroom

“ This summer I lived and worked with 11 current and former students during a 17-day residency on campus with ARTBARN, an immersive, site-specific theater company I founded in 2013. Many of the students had taken my class on the dramaturgy of sites and site-specific theater, and so this residency was a natural extension of the classroom.

Over the course of those 17 days, we collectively researched, wrote, designed, installed, and performed a new play inspired by the dystopian context of *The Handmaid’s Tale*, imagining a time after outrage and revolt in which apathy has set in. A band of women organize a compassionate resistance, creating a refuge to care for each other and to preserve the stories of the women who came before them. Students were involved in every step of the process, from research and writing, to design and performance, putting an education that emphasizes cross-disciplinary work into action within a professional context. Being so deeply collaborative with my students was incredibly rewarding.

Our students spend a lot of time working in the academic sphere; I don’t think we can give them enough opportunities to work in the professional sphere. The learning is so much deeper and faster because it’s embodied, and it can only happen in spaces like this. ”

JESS K. SMITH '05, ASSISTANT PROFESSOR, THEATRE ARTS

Learn more about  
ARTBARN at  
[pugetsound.edu/  
annualreport](http://pugetsound.edu/annualreport).



# Changing the face of leadership.

Puget Sound is committed to making college accessible to all talented and deserving students in order to live higher education's highest purpose: the preparation of leaders. In 2016–17 we welcomed our first cohort of Posse Scholars and celebrated 25 years of the Access Program's Summer Academic Challenge program.

## Preparing Tacoma Students for College

In partnership with Tacoma Public Schools, University of Puget Sound created Access Programs to offer traditionally underrepresented students in local middle and high schools opportunities to prepare for college. Through interaction with Puget Sound students and professors, visits to campus, and participation in community events and activities like Summer Academic Challenge, students like Isabel Mejia Natividad '20 gain confidence in their abilities and become ready to pursue their academic goals.

“I met Isabel when she was 13 and a student in the Summer Academic Challenge, a tuition-free math and science enrichment program for local students from underserved public schools to enhance college readiness. She told me that she was going to go to college, and today, not only is she a sophomore at Puget Sound, she's also a teaching assistant in the program. Isabel is a hardworking and dedicated student, and an impressive teacher and leader in her community. She serves as an advocate for girls' education and has shown many young women over the years how to be smart and strong in any situation.”

**AMY GERDES, TEACHER, SUMMER ACADEMIC CHALLENGE**

LEFT: AMY GERDES AND ISABEL MEJIA NATIVIDAD '20 WITH A ROBOT THEY PROGRAMMED TO SEND INTO SPACE. LEARN MORE AT [PUGETSOUND.EDU/ANNUALREPORT](http://PUGETSOUND.EDU/ANNUALREPORT).





“I can be a voice for those who have gone unheard.”

## Building a More Inclusive Campus Community

University of Puget Sound has partnered with The Posse Foundation, a national nonprofit organization committed to expanding the recruitment of outstanding young leaders from diverse backgrounds. Posse identifies high school students with extraordinary academic and leadership potential who may be overlooked by traditional college selection processes and places them in supportive, multicultural teams—“posses”—of 10 students at top-tier colleges. Scholars are awarded four-year, full-tuition scholarships. Nearly 75 percent of Puget Sound’s Posse Scholars, like Juan Molero ’20, are the first in their families to attend college. The initial program costs were covered by generous donations and the support of Puget Sound’s board of trustees.

“University of Puget Sound is an amazing place, but I believe I can make it even better. As a Posse Scholar, my role is to represent those who may not have been represented in the past, to be a voice for change for those who have gone unheard. Posse prepared us for challenging conversations with people from different backgrounds. We learned to confront issues of race and ethnicity, but also to understand where others are coming from. By bringing together multiple perspectives and generating conversation around these issues, we can create solutions that benefit everyone.”

**JUAN MOLERO '20**

Learn more about the Posse program at Puget Sound at [pugetsound.edu/annualreport](https://pugetsound.edu/annualreport).

# Investing in the next generation now.

Each year dedicated alumni volunteers make an incredible impact on campus—welcoming new students, raising money for financial aid, offering meaningful internship opportunities, and more.



## Connecting With Students

In 2017, with the help of volunteers, Puget Sound launched a pilot mentoring program to support students' career development via on-campus programs, employer visits, and one-on-one student meetings. Because of their shared collegiate experience, alumni are uniquely qualified to offer encouragement, inspiration, and advice to current students.

“I was thrilled to be a part of a pilot mentoring program that I knew could have so much impact and create another way for alumni to give back to the university. I have been fortunate in my life and career to have a handful of incredible mentors along the way. My conversations with my mentee, Harry Ha '18, have spanned academia and personal background, to values and culture both here and abroad. I especially enjoyed our discussion around the different measures of success in the United States versus China, Harry's home.

I have been humbled by the perspective and already incredible impact Harry is having on the world. This experience has reminded me of the amazing support I have received through the years, and has reinforced my belief that any conversation or action, even seemingly small, can have a profound effect on a person's life, in ways that may not be readily seen. I hope that some element of his personal, professional, or civic life will be improved by our interactions, and perhaps even compel him to be a mentor in his own career.”

**KATO WADE '04, VICE PRESIDENT AND DIRECTOR, CLIENT EXPERIENCE,  
ASCENT PRIVATE CAPITAL MANAGEMENT OF U.S. BANK**





### Inaugural Symposiums

Throughout the morning of President Crawford's inauguration, 30 faculty members and 20 students led a series of presentations showcasing innovative pedagogy, experiential learning, and Puget Sound's commitment to civic engagement. Following the presentations, hundreds of attendees had opportunities to engage in experiments and conversations with panelists.

# 2016–17 Highlights

Puget Sound continues to focus on developing high-impact educational practices to more deeply engage students and be a center of civic engagement and a model of civil discourse. This page and the next share just a few of the year's highlights:

## Teaching and Learning



Ten students, led by Professor Gareth Barkin, spent three weeks in Jakarta and Central Java, Indonesia, conducting individual research as part of the LIASE 2017 Southeast Asia field school course. The intensive trip followed an on-campus course, and was funded through support of the Henry Luce Foundation.



As part of the Practicum in Clinical Bioethics, students split time between the classroom and Tacoma General Hospital, learning how to identify ethical issues and how to properly address them in a clinical setting. Hear more about this course from Professor Suzanne Holland at [pugetsound.edu/annualreport](http://pugetsound.edu/annualreport).

## 2016

Forty-one percent of the Class of 2016 engaged in at least one internship, and 94 percent of the class gained valuable work experience while attending Puget Sound.

### Two New Majors

African American studies  
Environmental policy and decision making

## 70

Seventy pediatric and adult clients each year visit the on-site OT/PT teaching clinic. Under faculty and expert clinician supervision, students in the occupational and physical therapy programs provide free, quality health care. Much of this therapy is done with people who otherwise would not have access to occupational and physical therapists.



Robin Jacobson, associate professor, politics and government, was part of a trio of political scientists and sociologists that received a \$200,000 NEH grant to explore state-level aspects of immigration.

Geoffrey Block, professor, music, published the new book *Schubert's Reputation From His Time to Ours*, telling the story of how Franz Schubert has gradually become one of history's great composers.

The research team of Amy Fisher, assistant professor, science, technology, and society; Lynnette Claire, professor and director, business and leadership; David Latimer, associate professor, physics; and Daniel Sherman, professor, environmental policy and decision making, received an Independent Colleges of Washington and Puget Sound Energy-Efficiency and Conservation Grant for the project, "Using Citizen Science and Social Marketing to Promote Energy Conservation."

Tanya Erzen, associate research professor, religious studies, examines how and why evangelical Christian ministries are rapidly expanding in prisons in her new book *God in Captivity: The Rise of Faith-based Prison Ministries in the Age of Mass Incarceration*.

# 32

Thirty-two community nonprofits welcomed Puget Sound interns as part of three summer immersion internship programs. Partners included: Tacoma Public Schools, Northwest Immigration Rights Project, Mother Earth Farm, and Tacoma Community House.



## A SELECTION OF 2016–17 CAMPUS SPEAKERS

Timothy Egan  
*New York Times* columnist and author; 2017 Commencement speaker.

Julianne Malveaux  
Labor economist, author, and commentator

Rev. Irene Monroe  
Columnist, activist, and motivational speaker

Roz Chast  
Best-selling author, illustrator, and staff cartoonist for *The New Yorker*

Leonard Pitts Jr.  
Newspaper columnist (pictured left)

Ruchama Marton  
Founder of Physicians for Human Rights in Israel

Michael Medved  
Talk show host and best-selling author

## Enrollment

# 2020

Puget Sound welcomed 677 academically talented and diverse students into the Class of 2020.

- Twenty-eight percent are students of color.
- Sixteen percent are the first in their families to attend college.
- Twenty-three are from Tacoma public high schools—nearly three times as many as before our Tacoma Public Schools Commitment began in 2014.

## Recognition

# 100

Named among the top 100 liberal arts colleges in the U.S., based on an innovative new ranking system used by *The Wall Street Journal* and *Times Higher Education* that emphasizes teaching quality and student outcomes.

### Best in Washington

Best college in Washington state for getting a job after graduation, according to a new ranking based on U.S. Department of Education data.

## Athletics



Hans Fortune '17 was one of only two quarterbacks in NCAA Division III to earn Academic All-American. He also holds Puget Sound career records for passing yards (6,852) and passing touchdowns (58).



The women's basketball team made history, earning its first-ever undefeated record in conference play, and later advancing to the second round of the NCAA Tournament.

## After Puget Sound

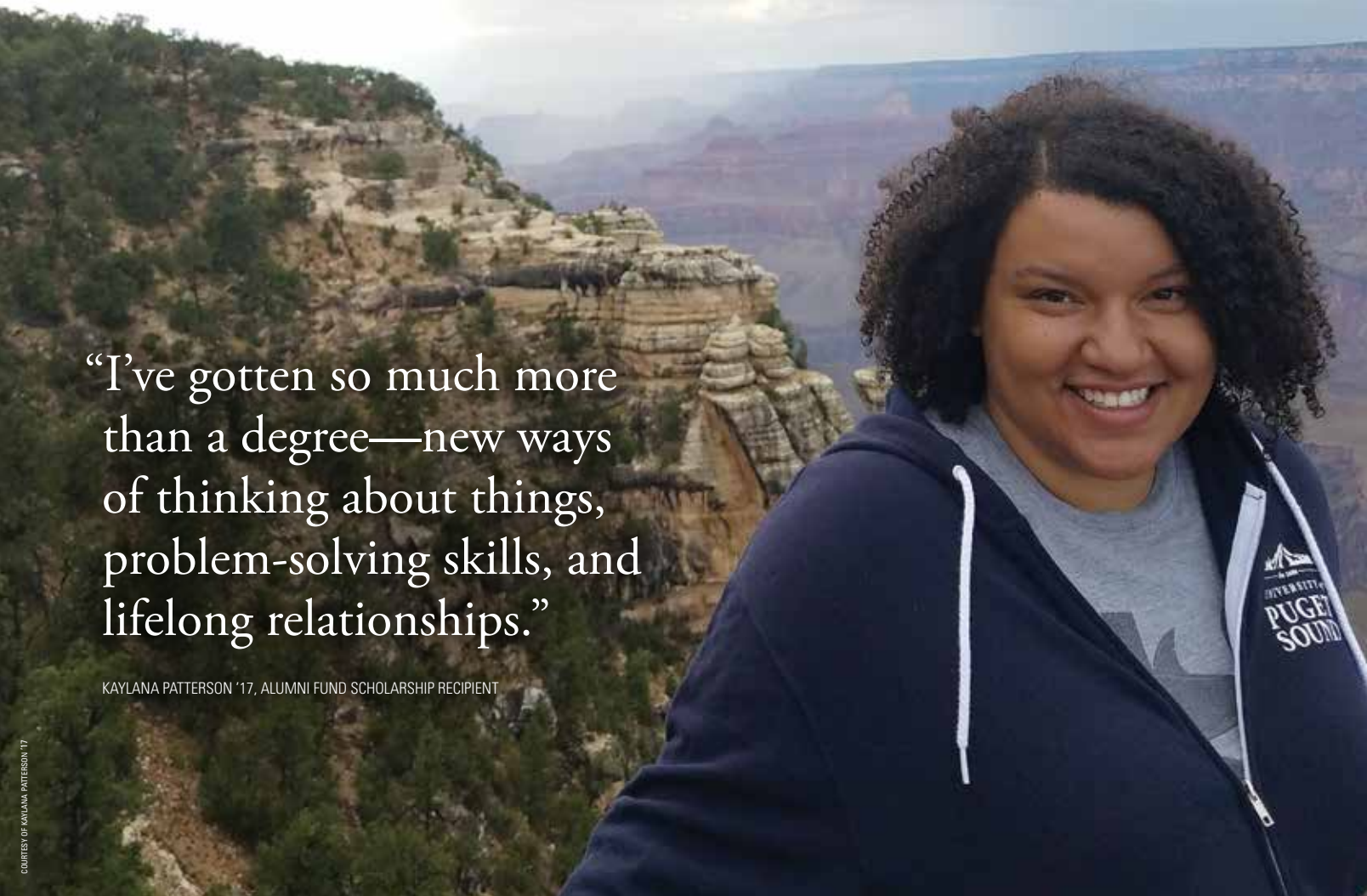


Eighteen students and young alumni won prestigious national scholarships and will teach or conduct research in countries including Morocco, France, Spain, China, Cambodia, India, and Germany.

# 93%

Seven months after graduation, 93 percent of the Class of 2016 was gainfully employed at companies like Amazon, National Institutes of Health, Boeing, and Microsoft; pursuing graduate study; or engaging in service with organizations like Peace Corps and Teach for America.



A photograph of a young woman with dark, curly hair, smiling broadly. She is wearing a dark blue zip-up hoodie over a grey t-shirt. The hoodie has a logo on the left chest that says "UNIVERSITY OF PUGET SOUND". The background is a vast, layered canyon landscape under a hazy sky.

“I’ve gotten so much more than a degree—new ways of thinking about things, problem-solving skills, and lifelong relationships.”

KAYLANA PATTERSON '17, ALUMNI FUND SCHOLARSHIP RECIPIENT

### Every Story Begins With You

Without the support of thousands of alumni, a Puget Sound education would be out of reach for many talented students. Nearly two-thirds of Puget Sound students receive need-based financial aid, including Alumni Fund Scholarships. In 2016–17 Alumni Fund Scholarships totaled \$340,000 in awards to 29 students, including Kaylana Patterson '17.

All of these stories, and thousands more, are made possible by alumni, parents, and friends like you.

# Thank you.







In support of our commitment to sustainability, recognition of individual donors  
(and more Puget Sound stories) can be found on our website.

**[pugetsound.edu/annualreport](https://pugetsound.edu/annualreport)**

Username: donor

Password: loggersgiveback

# SMSU FOUNDATION MISSION STATEMENT

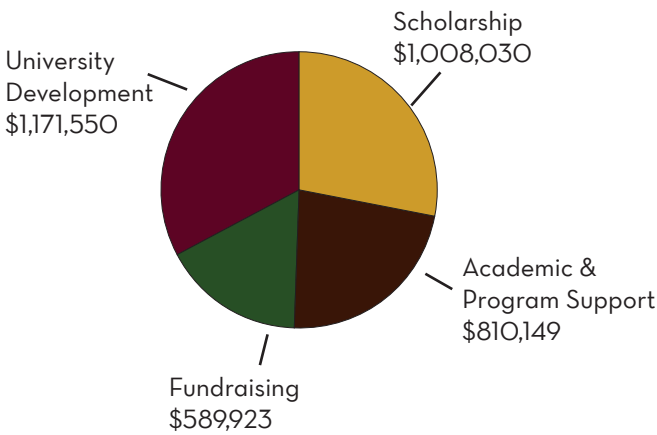


We exist in order to engage alumni and friends of Southwest Minnesota State University (SMSU) in funding scholarships, projects and activities that benefit SMSU students and support the strategic priorities of SMSU.

## GIVING BACK TO SMSU

The mission of the SMSU Foundation guides us in raising support for the benefit of the students and programs at SMSU. This past year 3,838 donors helped us generate \$3,882,197 in new contributions and revenue. In return the Foundation was able to give back over \$3.5 million in various forms of support outlined in the chart below.

### FOUNDATION SUPPORT FOR FY 2018 - \$3,579,652



## The Annual SCHOLARSHIP RECOGNITION LUNCHEON

Saturday, February 23, 2019

11:30 a.m.—1:00 p.m. • SMSU Conference Center

Please join us as we recognize our scholarship recipients and the people and organizations that help make their scholarships possible. Select scholarship recipients will be featured speakers.

Please register by February 1

[www.SMSUFoundation.org](http://www.SMSUFoundation.org) • Toll-free 1-800-260-0970



# STUDENT SPOTLIGHTS

ABUK AKOI



“The Access Opportunity Success program gave me a head start in my education and encouraged me to work hard in various aspects of my life.”

“Receiving an AOS scholarship helped me gain confidence as a student.”

“This scholarship goes beyond receiving money, it gave me a chance to reflect and appreciate the support I have around me.”

Abuk Akoi  
Sioux Falls, SD

Scholarship received:  
AOS Achievers Scholarship

SAMUEL WREH, JR.



“I want to start out by saying a big thanks to the donor/sponsor for the opportunities they’ve given me.”

“As a black African American male, to be picked out of all the brilliant men and women...it’s such an honor and privilege.”

“This scholarship means a lot to me because it fills in areas where I was lacking financially. I’m so grateful.”

Samuel Wreh, Jr.  
Plymouth, MN

Scholarship received:  
AOS Scholars Scholarship

ASA NELSON



“I am honored to have received this gift and thank the donors.”

“Thank you for your generosity. Your gift has lightened the burden tremendously.”

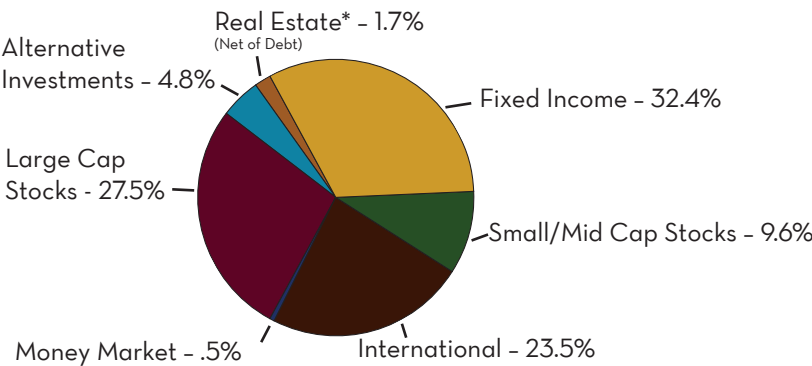
Asa Nelson  
Tracy, MN

Scholarship received:  
David & Marlyce Logan Family Scholarship

## INVESTMENT OBJECTIVE

The SMSU Foundation investment objective is to achieve, over a period of three to five years, a total rate of return which matches or exceeds the annual increase in the consumer price index, the Foundation’s distributions, administrative expenses and investment management fees. Endowments are assessed an internal management fee of 2% to cover administrative and operating expenses. **The fiscal year 2018 spending rate of endowed accounts was 4% of the average market value over the last three years.** Charts and graphs depicting our portfolio asset allocation and return rates are shown below.

### COMBINED PORTFOLIO ASSET ALLOCATION OF ENDOWED FUNDS AS OF JUNE 30, 2018

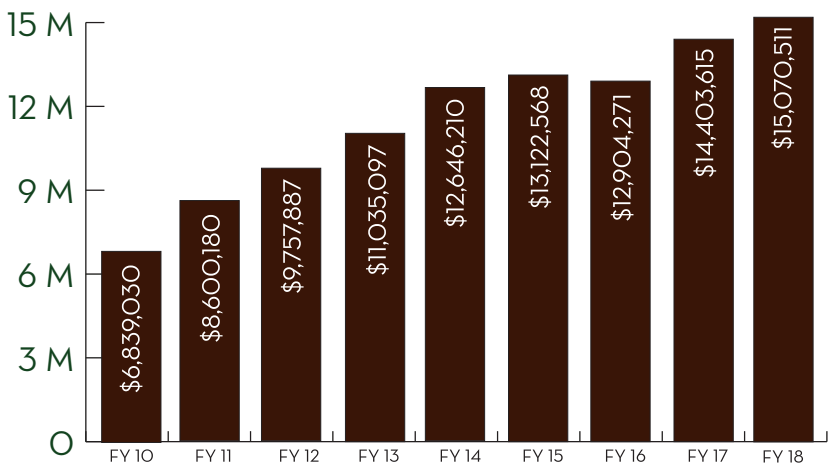


\* The SMSU Foundation has invested in its Foundation Residence Apartment project. That investment currently pays an 8% annual return.

### COMBINED PORTFOLIO RETURNS AS OF JUNE 30, 2018

1 YEAR 2017	3 YEAR average	5 YEAR average	10 YEAR average
8.65%	7.10%	7.69%	6.15%

### TOTAL FOUNDATION ASSETS AS OF JUNE 30, 2018





# SOUTHWEST STORY

DAVE & MELISSA WERPY



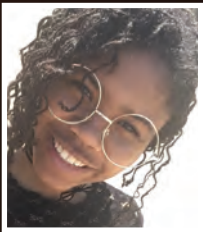
Hard work and inspiration can best describe the Werpy family story.

Dave and Melissa (Johnson) Werpy both attended high school in Marshall, Minnesota, where they learned about the value of hard work. Dave helped his father, Galen, in the Super Valu bakery, and later worked at the shoe store downtown, where he first saw Melissa. Servant leaders early on and just by coincidence, the couple was also teaching Sunday school at St. Stephen Lutheran Church in Marshall at the time they met.

In 1979, Dave graduated from then SSU with an accounting degree on a Saturday, began work at 3M the following Tuesday, and married Melissa six weeks later. Dave has since retired from 3M, after 38 years with the company. Werpy comes from a family of first generation SMSU grads. His brother, Todd, and two sisters, Pam (Miller) and the late Sue (Bruss) all graduated from SMSU. Dave currently serves as 1st Vice President of the SMSU Foundation Board.

Melissa is fluent in French, committed to cooking local foods, and is a talented painter and potter. In fact, she completed her freshman year of study in art at SMSU before getting married, and continued her studies both at the University of Minnesota and at multiple art schools across Europe. Her enthusiasm for seeking visual inspiration is now applied to the sights and scenes of the local St. Croix Valley and lake settings in central Minnesota.

Dave and Melissa Werpy established the Dave & Melissa Werpy Endowed Scholarship in September of 2016 to assist hard working students of SMSU who serve and are engaged in the community.



AVIANNA  
McFARQUHAR

*was the recipient of the  
Dave & Melissa Werpy  
Endowed Scholarship for the  
2018-2019 academic year. Avi-  
anna is a sophomore from  
Marshall, MN majoring in  
Accounting, Management  
and Theatre Arts.*

# SMSU FOUNDATION ENDOWMENT REPORT

SOUTHWEST MINNESOTA STATE UNIVERSITY  
FOUNDATION

1501 State Street • Marshall, MN 56258 • 800-260-0970  
Foundation@SMSU.edu

The financial information in this report was drawn from the SMSU Foundation annual audit completed by the independent auditing firm of Hoffman & Brobst. If you are interested in receiving a copy of the completed audit, it is available by contacting the Southwest Minnesota State University Foundation Office.





Thanks to You, We Met the Match!

SMSU

SOUTHWEST FUND

Investing in Students. Investing in Southwest.



# THANKS TO YOU, WE MET THE MATCH!

**By increasing your gift** to the Southwest Fund last school year, you helped raise an additional \$7,000 for the Southwest Fund.

The SMSU Foundation Board of Directors put forth a **\$7,000** matching gift opportunity for SMSU alumni to raise their giving to the Southwest Fund. Over **400 SMSU alumni** (like YOU) responded by increasing their giving to meet the match.



Combined, all gifts to the **Southwest Fund** created the **largest annual gift** to **SMSU** last school year

>> **\$176,000**

SOUTHWEST MINNESOTA STATE UNIVERSITY  
**FOUNDATION**

1501 State Street • Marshall, MN 56258  
[www.SMSUFoundation.org](http://www.SMSUFoundation.org)

<<Name>>

<<Address>>

<<City, State Zip>>



Here's what **your giving** to the **Southwest Fund** has made possible this current school year:

**\$80,000**  
Student  
Scholarships



**\$25,000**  
Special Faculty  
& Staff Grants



**\$35,000**  
Technology &  
Equipment Upgrades



**\$50,000**  
Alumni  
Programs







*the*

*Highlights from Philanthropy  
Fiscal Year 2018*

# IMPACT

*of giving*



PSU  
Foundation  
PORTLAND STATE UNIVERSITY



# A NEW DAY

Friends,

Each day at Portland State University brings moments of connection and discovery that change lives — and change our city and world. Such moments are powered by philanthropy. Private contributions make an enormous difference, from supporting scholarships and professorships to advancing important research.

This fiscal year, donors committed nearly \$43 million to support PSU students, faculty, programs and facilities. I am so pleased to share a few memorable stories of this breakthrough year with you.

Today and always, the generosity of our community lights up every new day at PSU. Thank you.

Sincerely,



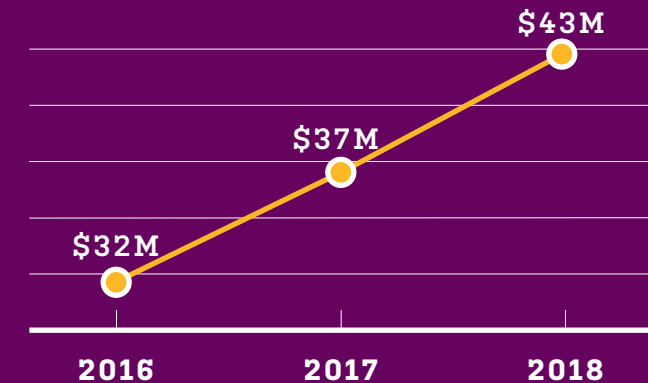
William Boldt  
President, PSU Foundation

**ON THE COVER:** PSU mechanical engineering student, Rihana Mungin shares her inspiring story with nearly 1,400 attendees at the 2017 Simon Benson Awards Dinner.

## PSU FOUNDATION FY18 FUNDRAISING SNAPSHOT

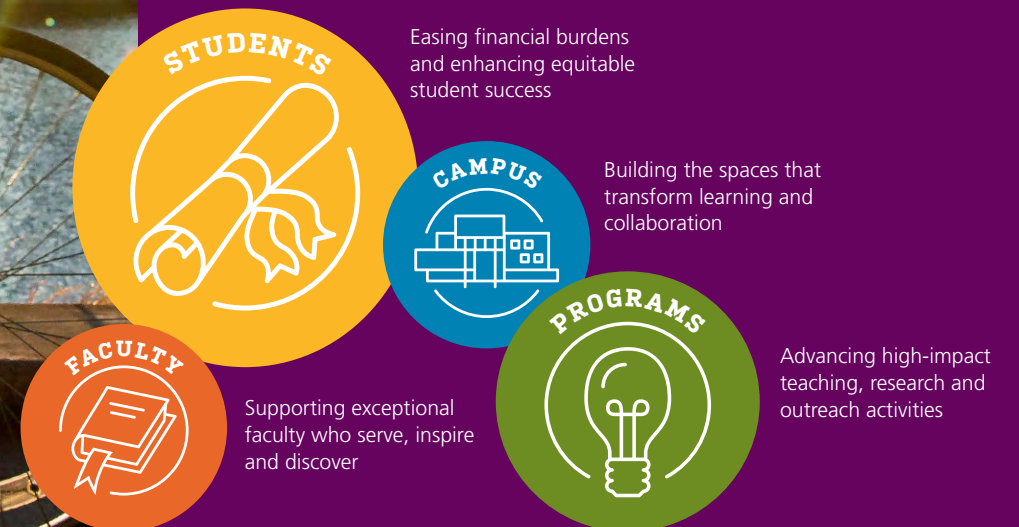
Check [www.psuf.org](http://www.psuf.org) for audited financials beginning Dec. 1, 2018.

### 3-YEAR FUNDRAISING TREND:



In FY 2018, gifts and pledges from individuals, alumni, corporations, foundations, employees and other organizations totaled nearly \$43 million to advance PSU and all those it serves.

### TOP AREAS OF PRIVATE SUPPORT:





# BEST AND BRIGHTEST

At the heart of every great university are the distinguished faculty whose passions and pursuits define it.

This year, one remarkable gift from an anonymous PSU alumnus created eight new Portland Professorships in The School of Business. Portland Professorships help the university keep and attract exceptionally talented faculty, and provide immediate support for their teaching and research.

One of the newest Portland Professors is Dr. Desirée Pacheco. A specialist in social movements, Pacheco researches the barriers and opportunities faced by environmentally conscious startups when they enter fields dominated by established enterprises.

Although her work explores the intersection of business and the environment, Pacheco is looking for something bigger — a quality shared by many of her faculty peers. “I’ve always had the desire to study transformational change,” she says.

Donor generosity has created 13 Portland Professorships since the program's inception in 2017.





# BUILDING FUTURES

Now and always, private support for committed students is the ultimate talent accelerator, easing the financial burdens that can keep even the most motivated from achieving their dreams.

PSU friends and supporters understand the importance of investing in student success. That's why scholarships are the largest single area of giving at Portland State. This year, donor contributions allowed PSU to award scholarships to thousands of students, including Shepol Meman, a mechanical engineering senior in the Maseeh College of Engineering & Computer Science.

For Meman, the scholarship provided motivation. Last summer, he landed a job with Daimler Trucks North America, where he worked alongside other engineers, performed market research and pitched project ideas. Meman says working at Daimler full time is his new dream.



Scholarships provided critical support and pathways to achievement for more than 1,466 students this year.



Children under the age of five are one of the largest groups served by the Oregon Scottish Rite of Freemasonry Speech and Language Clinic.

# KNOWLEDGE SERVES

With seven colleges and more than 200 individual degree programs, PSU is a vibrant and dynamic community of learners. Each of its many programs engage the city in unique and powerful ways.

One of the university's longest-running outreach programs is its Speech and Language Clinic, which has provided low-cost or free services to countless families since 1964.

In 2017, the Oregon Scottish Rite made an endowed gift to provide the clinic with perpetual operating funds, enabling it to expand outreach to rural areas, support camps for children with speech and language impairments, purchase equipment, and enhance student training. PSU is pleased to partner with the Oregon Scottish Rite in its mission to serve children with communication challenges.

This spring, in recognition of this transformational investment, the space was renamed the Oregon Scottish Rite of Freemasonry Speech and Language Clinic.

This year, donors contributed more than \$10 million to support departments and programs at PSU.





# FUTURE FORWARD

There is no doubt that capital improvements shape the PSU campus. They also enhance the day-to-day experiences and opportunities of every student at Portland State.

At the Graduate School of Education, a major gift from education advocates Christine and David Vernier is poised to make a major impact in how PSU trains future teachers.

The family's \$1 million investment will create a state-of-the-art STEM training classroom at the university's new 4th and Montgomery building, expected to open in 2020. The Vernier STEM classroom will give students the chance to practice teaching on a wide range of equipment, including the latest technology. The classroom's modular layout and moveable furniture will be designed to promote collaborative learning.

"We believe the surest way to inspire a love of science and math in the next generation is by investing in extraordinary teachers," says Christine Vernier.



Support for collaborative spaces enhances the student experience while transforming teaching and learning.



This year, donor-supported PSU faculty collaborated with 530 community partners in education, arts, science and business.



# MAKING HISTORY

PSU is a powerful convener for nonprofits, businesses and municipal agencies. Philanthropic investments in these dynamic partnerships shape what is possible — and keep exceptional faculty engaged in work that matters.

Chemistry professor Tami Lasseter Clare is a world leader in art conservation. She uses her knowledge of science to preserve and protect treasured art objects.

Clare's expertise inspired the Andrew W. Mellon Foundation, which awarded her a \$1 million grant to lead a new Pacific Northwestern Consortium for the Science of Cultural Heritage Conservation at PSU. In this role, she will work with partners at the Portland Art Museum, the Seattle Art Museum, University of Washington Libraries, Jordan Schnitzer Museum of Art at the University of Oregon and Alaska State Museum.

The Mellon Foundation's investment in a collaborative project like this, says Clare, will help to preserve our region's artwork for generations to come.

Dr. Tami Lasseter Clare at the Portland Art Museum.



# TOGETHER FOR GOOD

Each year, the PSU Foundation celebrates the generosity of donors through recognition societies that host unique events, receptions and performances.

In 2018, a special new society was born. Named after Portland's oldest park at the center of the PSU campus, the Park Blocks Society recognizes donors who have invested \$1,000 or more during the fiscal year. This group encompasses, but does not supplant, established giving circles at PSU.

This spring, Park Blocks Society members came to campus to stroll the park, tour new facilities, hear from leaders and meet student ambassadors.

Meanwhile, other top societies are also in full bloom. The Vanport Society recognizes lifetime giving of \$100,000 or more, and the Epler Society, named for PSU's founder, honors donors who have named PSU in their estate plans.



More than 1,100 committed donors are part of PSU's newest recognition group, the Park Blocks Society.



Student ambassadors lead a personal tour at a Park Blocks Society event.



Alex Sokol Blosser leads  
a recent PSU alumni tour  
at Sokol Blosser Winery.

# ACTIVE ALUMNI

The PSU Alumni Association (PSUAA) is a worldwide organization dedicated to connecting alumni, parents and friends of PSU with networking, learning and giving opportunities.

This past year, the PSUAA offered a full slate of opportunities centered around education, culture and professional development — everything from etiquette dinners for students and young alumni to VIP art museum tours.

One highlight was a tour and tasting at one of Oregon's premier wineries, Sokol Blosser. PSU alumnus and co-president Alex Sokol Blosser took his fellow Vikings on a tour of the space, introducing them to the tastes of one of our region's most celebrated agricultural products.

This year, nearly 10,000 PSU graduates  
became new card-carrying members  
of the PSU alumni association.





# OPENING DOORS

Over the last decade, public and private investment has sparked a stunning evolution of PSU's downtown campus — benefiting students, faculty, athletes and the public. Donor support made possible this year's capital achievements:

## **Karl Miller Center**

**Doors opened September 2017**

*The iconic new building for the School of Business features technology-enhanced classrooms, modern study spaces and a five-story glass atrium.*

## **Viking Pavilion at the Peter W. Stott Center**

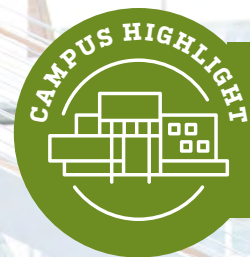
**Doors opened April 2018**

*The new home of Portland State Viking Athletics features a 3,000-seat arena and new academic and study spaces.*

## **724 Harrison Building Renovation**

**Groundbreaking March 2018**

*This comprehensive renovation project of a core campus facility, (formerly Neuberger Hall) slated to open Fall 2019, will house key academic and student programs and the beautiful new Jordan Schnitzer Museum of Art.*



Donors have contributed nearly \$46 million since FY 2013 to build the high-impact facilities that are transforming campus.



Karl Miller Center  
grand opening



# PSU FOUNDATION 2017-18

## BOARD OF TRUSTEES

July 1, 2017 – June 30, 2018

### EXECUTIVE COMMITTEE

Wally Van Valkenburg, Chair

Al Barkouli '83, '87  
Keren Brown Wilson '83  
Kimberly Cooper  
Jared A. Holum  
Tammy Neitzke '97  
Mark Rosenbaum  
Paul Schlesinger  
Barre Stoll '89, '92  
Don Vollum '94

### ALUMNI ASSOC. BOARD

Dan Adams '92  
David Audley '97  
Theresa Bell '11  
Eric Brown '97  
Al Fitzpatrick '83  
Lori Hensel '04  
Lori Heino-Royer '02  
Matthew Johnson '02, '07, '06  
Connor Kavanaugh '12  
Amanda Lamb '10  
Bill Lemman '48, '04  
Greg Meyer '08  
Joel Morton '90  
Kirk Sidley '72  
Vera Sell '06  
Trudy Toliver '84  
Sean Zimmerman '05

### TRUSTEES

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Gary Cumpston '90  
Mary Dick '80  
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Tom Fink '71  
Elizabeth Fuller '08  
Kathryn Halton Rebagliati MBA, '99  
Linda Hamilton '91  
Scott Hibbs  
Scott Langley  
Ross Lienhart  
Steve Petruzelli '68  
Richard B. Solomon '69  
Lindsay Stewart  
John Whearty '91

### EX-OFFICIO

William Boldt  
*President/CEO, PSU Foundation*

Greg Meyer '08  
*President, PSU Alumni Association*

Rahmat A. Shoureshi  
*President, Portland State University*



**PSU  
Foundation**  
PORTLAND STATE UNIVERSITY



**TRANSFORMATIVE**  
CAMPAIGN FOR GLOBAL CHANGE

# 2017 – 2018 Annual Report

PREPARED FOR

Mr. Generous Donor

At Rensselaer Polytechnic Institute, to prepare our graduates to deal with instability, volatility, and change, we have educated them to have intellectual agility, multicultural sophistication, and a global view. We have re-envisioned ourselves as The New Polytechnic—a great crossroads for collaborations across disciplines, sectors, geographies, and generations—using the most advanced tools and technologies to address intricate and interwoven global challenges, building resilience into our systems and societies, and staving off crises.



"We build on the greatness of our past to create our future—one with a continuous fusion of ideas. Excitement is part of daily life because our people, resources, programs, and venues support breathtaking new enterprises. This is the Rensselaer we love, re-imagined for the 21st century: vibrant, engaged, relevant, and leading the way."

PRESIDENT SHIRLEY ANN JACKSON, Ph.D.



November 2018

Dear Mr. Donor,

On behalf of Rensselaer, it is my pleasure to present your Annual Report for the time period of July 1, 2017 – June 30, 2018.

Following another unprecedented admissions season, with over 20,400 applications, we recently welcomed the largest and most diverse group of first-year students in Rensselaer history. We are proud of the significant increase in applications from women, international students, and “legacies,” whose relatives have attended the Institute. The Class of 2022 includes 1,796 students, 300 of whom come from countries around the world; 95 were valedictorians or salutatorians of their high school graduating class, and 233 were nominated for the prestigious Rensselaer Medal scholarship.

We attribute this success to an expanded awareness of our world-class education and global challenge-linked research, and valuable outreach on the part of alumni, alumnae, corporate partners, and friends of Rensselaer. We are grateful for this support, which will be instrumental to the success of our \$1 billion capital campaign, [\*Transformative: Campaign for Global Change\*](#), publicly launched in October 2017.

Our outstanding academic programs continue to earn recognition. The Information Technology and Web Science (ITWS) program at Rensselaer is ranked 1<sup>st</sup> among 35 undergraduate programs at national colleges and universities by *College Choice*, and is the first of its kind in the nation. Our physics major is ranked 6<sup>th</sup> by *USA Today*, and Rensselaer is ranked 19<sup>th</sup> in the nation for career placement in the Princeton Review’s 2018 edition of *Colleges That Pay You Back*. With our overall composite score rising each year, Rensselaer has been ranked as one of the top 50 national universities by *U.S. News* for the past 18 years.

Thank you for your continued interest in the achievements and successes of our students and faculty. Funds such as yours enable their continued efforts to answer the question, “why not change the world?”

Sincerely,


XXX

Vice President, Institute Advancement



**TRANSFORMATIVE**  
CAMPAIGN FOR GLOBAL CHANGE





## Generous Donor Scholarship

The Generous Donor Scholarship was established in 1951 by Great-Grandfather Donor, after he won a bingo tournament.

### RECIPIENT INFORMATION

Sylvester Student '19 from Narragansett, RI, was the recipient of the Generous Donor Scholarship for the 2017-2018 academic year. Sylvester is a computer science major, and you may contact him at [studes2@rpi.edu](mailto:studes2@rpi.edu).

### FINANCIAL SUMMARY JULY 1, 2017 - JUNE 30, 2018

Opening Book Value	\$	1,000,000.00	Opening Market Value	\$	2,345,678.90
Additions to the Fund	+	\$ 100,000.00	Change in Market Value	+	\$ 123,456.78
Closing Book Value	\$	<u>1,100,000.00</u>	Closing Market Value	\$	<u>2,469,135.68</u>

Income Available for Expenditure:      \$    123,456.75

*"The world truly needs that particular combination of qualities that characterizes the men and women of Rensselaer—that combination of audacity, creativity, pragmatism, and refusal to be daunted by the scale of a challenge."*

*President Shirley Ann Jackson, Ph.D.  
June 2, 2018*



**TRANSFORMATIVE**  
CAMPAIGN FOR GLOBAL CHANGE

## UNDERSTANDING YOUR DONOR REPORT

The Office of Donor Relations and Advancement Communications (DRC), in partnership with the Division of Finance and the respective department(s) managing the fund(s), prepares annual stewardship reports near the end of each calendar year. These updates include a summary of your fund(s) for the previous fiscal year at Rensselaer. The information included below is intended to assist you in understanding and interpreting your donor report.

Providing exemplary stewardship of the gifts invested at Rensselaer is our primary mission. At any time, please feel free to contact DRC with questions or comments at [drc@rpi.edu](mailto:drc@rpi.edu) or (518) 276-XXXX.

### FREQUENTLY USED TERMS:

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**Fiscal Year:** Rensselaer's fiscal year is a 12-month period that begins July 1, and ends on June 30 of the following year. Your report will reflect fund activity that took place during the prior fiscal year.

**Book Value:** The book value represents the original value of the investment, plus additional gifts from any source, and any transfers from the spending account that may have been reinvested into the endowed principal.

**Market Value:** The market value is the value of the fund as a part of the Institute's total endowment. This figure changes constantly and is tied to daily fluctuations in financial markets. (This figure does not include the value of any life income or testamentary gifts that ultimately may be added to this fund.)

**Income Available for Expenditure:** This amount was available to support the specific objectives of this endowed fund for the reported fiscal year.

### STUDENT SUPPORT:

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Endowed and expendable scholarships are administered by the Institute through the Office of Financial Aid. The Office of Financial Aid 1) reviews federal student financial aid applications; 2) reviews the criteria of established scholarships when applicable; 3) reviews the students who meet the criteria; and 4) selects the recipient(s) of restricted scholarships. When necessary, the Office of Financial Aid consults with and requests recommendations from Institute advisors to determine the most deserving student who qualifies for a specific scholarship.

Rensselaer follows Family Educational Rights and Privacy Act (FERPA) guidelines in respecting students' rights to privacy. That privacy includes the right not to have disclosed the details of their financial aid packages.

Approximately 85% of students at Rensselaer receive need or merit based scholarships.

#### Estimated Cost of Attendance for 2018-2019:

Undergraduate (First Year)		Graduate (Full-time)	
Tuition:	\$52,550	Tuition:	\$52,550
Fees:	\$1,329	Fees:	\$2,890
Books and Supplies:	\$2,858	Books and Supplies:	\$2,950
<u>Room and Board:</u>	<u>\$15,260</u>	<u>Estimated Living Expenses:</u>	<u>\$14,249</u>
Total:	\$71,997	Total:	\$72,639

**Fall 2018 Full-Time Resident Enrollment:** 6,585 (undergraduate) + 1,188 (graduate) = 7,773 (total)





To ready Rensselaer, the first technological research university in the nation, for global leadership in our third century, we have undertaken a \$1 billion capital campaign,

### **TRANSFORMATIVE: CAMPAIGN FOR GLOBAL CHANGE.**

On October 24, 2018, the annual *Rensselaer Scholarship Gala* was successful in raising awareness for each of the three campaign pillars, while recognizing the generous gifts that have provided the foundation for this multi-faceted campaign. The gala generated additional scholarship support for students, while highlighting partnerships that strengthen our world-class research efforts, and showcasing our innovative pedagogy.

The event culminated with a historic performance by the Rensselaer Orchestra at Carnegie Hall, in celebration of the launch of our Bachelor of Science in Music. This presented a once-in-a-lifetime opportunity for our student musicians, undergraduate and graduate, all of whom benefit from donor-funded support. Thank you!



***Transform. Innovate. Inspire.***  
The Rensselaer Orchestra  
Nicholas DeMaison, Conductor

### **THE RENSSELAER ENDOWMENT**

"The endowment provides the fundamental financial underpinning of the university, and as such, ensures its sustainability over time, and positions the Institute to continue to serve and support our students and the faculty who teach them now, and into the future."

PRESIDENT SHIRLEY ANN JACKSON, Ph.D.

Endowment gifts have fueled the Institute's mission since 1824, when Stephen Van Rensselaer founded a school "dedicated to the application of science to the common purposes of life." Donors who support the endowment, either in their lifetime or through their estate, create a permanent legacy that enables the Institute to educate people who will make the world a better place.

As Rensselaer approaches the bicentennial of its founding, in 2024, it is essential that we grow our endowment to \$1 billion; *Bridge the Gap* that exists between students' needs and available financial aid resources; *Build Out the Campus* by modernizing the academic, research, and student life facilities that enable us to transform our students into the next generation of resilient and inspired leaders; and realize the *Faculty 500*, which will attract and empower talented professors whose research and teaching will change the world.

### **IF YOU HAVE ANY QUESTIONS REGARDING YOUR GIFT:**

Please contact the Office of Donor Relations and Advancement Communications, at (518) [REDACTED] or by email at [drc@rpi.edu](mailto:drc@rpi.edu).



**TRANSFORMATIVE**  
CAMPAIGN FOR GLOBAL CHANGE



# YEAR IN REVIEW

**Ryerson  
University**



**Ted Rogers  
School of  
Management**



**TED  
ROGERS  
SCHOOL  
OF MANAGEMENT**

**2017/2018**

**Ryerson  
University**



**Ted Rogers  
School of  
Management**



**“The strong sense of community cultivated on the TRSM campus is one of the standout factors in my continued success as a student and future business leader.”**

Bindiya Kalloo-Hallam  
Ted Rogers Co-op Student,  
Accounting and Finance, 2019



# **As the new Dean of the Ted Rogers School of Management, I am proud to lead the most innovative and dynamic business school in the country. Part of what attracted me to TRSM is strong community support.**

In my short time here, I've seen that TRSM is an ambitious place, with a well-deserved reputation for innovation. With your support, we are not only sustaining this reputation, but intensifying it.

Our Award and Scholarship program is integral to the quality of the student experience each day. Students who receive funding are getting the opportunity to thrive because that support allows them to focus on their studies, future careers and relationship building. The support also attracts the highest quality of students who choose to enroll here because they know the possibilities are limitless.

In the past year, TRSM has seen a tremendous amount of growth. Our Co-op program, for example, has been a homerun as it provides students with valuable work experience and the opportunity to make industry connections and explore different career paths. In addition, a number of our faculty members have received awards for their work in areas such as childhood development, social media, diversity and inclusion. And, our students continue to engage in initiatives that are changing lives through such efforts as mental health awareness, gender equality and underprivileged youth.

As we move forward as partners, it is important that you are aware of not only the tremendous impact you have on our students, but also that we consider you to be a part of Ted Rogers School of Management - its successes and its triumphs.



**Dr. Daphne Taras has been recognized as one of Canada's most powerful women by the Women's Executive Network Toronto.**

# The Business Career Hub at a Glance

The Business Career Hub (BCH) offers career development opportunities tailored to each student's individual needs and program specialization. Career consultants meet one-on-one with students to ensure they have the academic, professional and interpersonal skills needed to succeed in the workplace.

1,011

New Employer Connections in 2018

## Services Offered

- Skill Building and Resume Workshops
- Networking Etiquette Training
- Information and Interview Technique Sessions
- Portfolio Creation, Powered by Magnet
- Career Showcases
- One-on-One Career and Self-Discovery Consultations
- Personalized Industry-Specific Career Advising
- Career Recruitment
- Job Interview Coordination

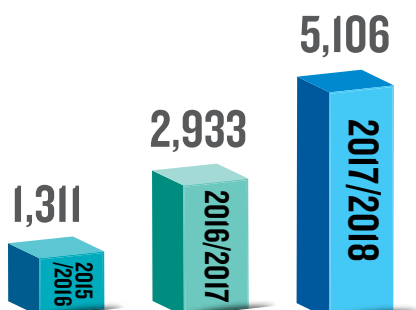
2,461



**TECHNICAL SKILLS  
BOOTCAMP PARTICIPANTS**

98% of Students Would Recommend

**BCH**



**ONE-ON-ONE COACHING  
AND DROP-IN SESSIONS**



**Top 200 Program**

Top 200 Program – Winner of the 2017 Canadian Association of Career Educators and Employers Award for Excellence in Innovation-Leadership Development.

The Top 200 Program is a unique two-year program that brings students together outside of the classroom and provides specialized experiential learning activities. Upon graduation, Top 200 students hit the ground running with highly-developed career readiness skills, and the confidence to apply those skills in whatever field or endeavour they choose.



# Business Career Hub Alumni Profiles



## Igor Reshynsky

**Analyst – Corporate Treasury, RBC**  
**B. Comm, Accounting, Minor, Finance, 2016**

Igor acknowledges that the Business Career Hub at Ted Rogers School of Management went above and beyond in helping him land employment. Most notably, the BCH organized a one-on-one meeting with a recruiter from RBC. The recruiter gave advice on resume-building and tips on how to apply to summer opportunities at the organization. Igor was the first TRSM student to be offered a role within the RBC CPA program and got his full-time offer from RBC in his last year of study. Igor also attributes his success to the one-on-one mock interview. Never having interviewed for a professional role before, it helped him understand what he should expect and how to prepare. Since joining RBC in 2016, he has moved up to work as an analyst in the Corporate Treasury department.

## Kerry-Ann Poorman

**Associate Manager,**  
**Commercial Credit Equitable Bank**  
**B.Comm, Finance, 2014**

Kerry-Ann believes her career consultant at the Business Career Hub at Ted Rogers School of Management was instrumental in helping land her first job after graduating. Her consultant guided her through improving her resume, preparing for interviews and targeting her preferred industries. Above all, the BCH encouraged her to be herself and tell her story – connecting who she is and what she has to offer with each prospective employer. Since joining Equitable Bank in 2015, Kerry-Ann has quickly risen through the ranks and has received two promotions.



# The Ted Rogers Co-op Program

Our program has been designed with industry experts to ensure it meets the changing needs of today's business world.

## Specialized Prep Program



Before a student's first placement, he/she participates in a specialized prep program to build career readiness, professional competencies, industry training, peer mentoring and core technical skills. Our students offer organizations value from day one.

## Real-World Hiring Process



Ted Rogers Co-op hiring process functions like any other job application. It is a competitive process that prepares students to go through job searches after graduation.

## Unique Co-op Pathways for Students and Employers



In addition to the traditional co-op pathway (4 month co-op terms), TRSM offers work terms up to 16 months in duration.



THE TED ROGERS CO-OP PROGRAM IS PREDICTED TO HIT 1,500 STUDENTS IN THE NEXT TWO YEARS.



YEAR ON YEAR PROGRAM GROWTH

110% in August 2018

42% in August 2017



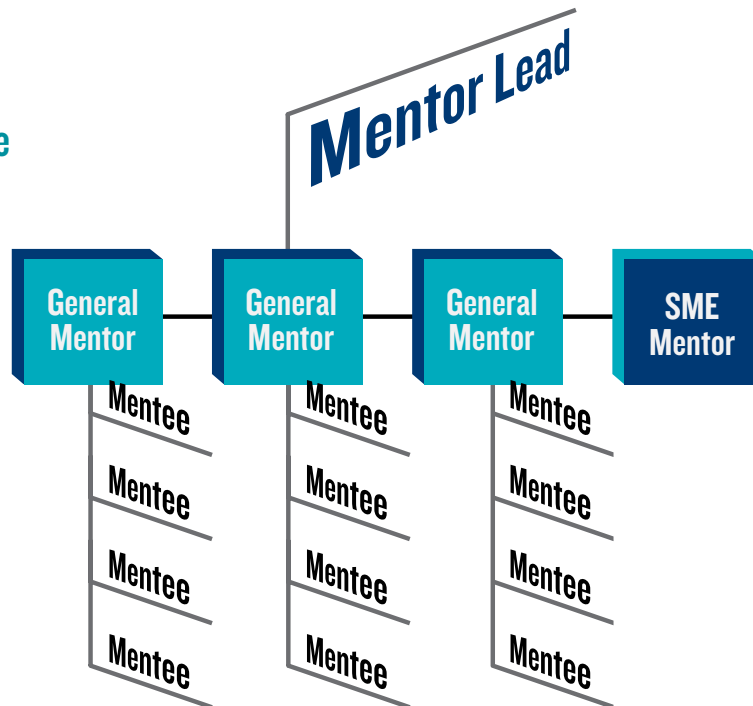
“We are well on our way to becoming the largest, most relevant Business Co-op program in Canada!”

Donna Muirhead, Manager, Co-operative Education and Careers, TRSM Business Career Hub

# The Ted Rogers Co-op Peer Mentorship Program

**The Vision:** A supportive ecosystem where senior co-op students leverage personal experience to coach junior co-op students toward career success; developing long-term reciprocal relationships with the school and each other.

## The Structure



## How It Works

Mentors are individuals who have been part of the Ted Rogers Co-op program for at least one semester. They are there to meet one-on-one with mentees, provide in depth support where needed and help mentees to understand the process and what to expect in their co-op roles.



*"I am glad I got the opportunity to participate in the peer mentorship program. Having access to a student who had already gone through their first co-op hiring process was very helpful to me. I had someone who I could relate to on a deeper level about my first work term anxieties and get guidance and reassurance to push me through the hardships. Another amazing aspect of the peer mentorship program is the support from my fellow mentees in the group. There is always someone willing to take the time to share their experiences and talk through any concerns."*

– Isabella Akselrud, Mentee






# Think, Act, Connect - Research at TRSM

From learning about the impact information and communication technology has on air pollution around the globe, to uncovering insights into what business incubators should be spending money on to operate more effectively, TRSM researchers have collaborated with partners within the school, the city and internationally to address critical issues and shed light on emerging technology and trends. Our research centres, institutes and labs enhance our collaborative focus, as do the more than 450 external and funding research partners we worked with across 36 countries.

  
**OVER 450**  
**RESEARCH PARTNERS**

  
**OVER 1,600**  
**STUDENT RESEARCH POOL PARTICIPANTS**

## Dr. Anatoliy Gruzd

Anatoliy Gruzd is a Canada Research Chair in Social Media Data Stewardship, Associate Professor at TRSM and Director of Research at the Social Media Lab. He is also a member of the Royal Society of Canada's College of New Scholars, Artists and Scientists, co-editor of a multidisciplinary journal on Big Data and Society and a founding co-chair of the International Conference on Social Media and Society.

Gruzd's research explores how the advent of social media and the growing availability of user data are changing the ways in which people and organizations communicate, collaborate and disseminate information, and how these changes impact the social, economic and political norms and structures of modern society. The broad aim of his various research initiatives is to provide decision-makers with greater insight into the behaviours and relationships of online network members, and to understand how these interpersonal connections influence personal choices and actions.

## IN 2017, DR. GRUZD

**WAS NAMED A MEMBER OF THE COLLEGE OF NEW SCHOLARS, ARTISTS AND SCIENTISTS, ROYAL SOCIETY OF CANADA (RSC)**



Dr. Anatoliy Gruzd  
Director of Research, Social Media Lab,  
Associate Professor

**Gruzd's research has shown that Canada is "one of the most 'connected' countries in the world," as he puts it. His lab has found that 94% of Canadian adults who use the internet have at least one social media account.**

**“The kids were so passionate about learning and education because for them, that was the gateway to a future.”**

**Aaron Armstrong**

TRSM business student and captain of last year's Ryerson Rams Varsity Hockey team





# TRSM is Making a Social Impact

The Ted Rogers School of Management students have a long history of using business education and entrepreneurship to make real social change in our community and around the world. The Dean's Student Leadership Award for Community Building and Social Impact was created to recognize students for their efforts in the community. This year, there were 24 innovative entries with initiatives affecting change across the globe.

One entry came from Aaron Armstrong, TRSM business student and captain of last year's Ryerson Rams Varsity Hockey team, whose hockey school made a difference in the lives of 27 Cambodian orphans.

During a humanitarian trip to Cambodia with fellow Ryerson students, Armstrong visited an orphanage and learned about the hardships and trials that the orphans were forced to endure. During his two weeks at the orphanage, Armstrong spent time with the children; guiding them in play, teaching them English and offering a helping hand wherever needed. Of his experience with the orphans, he says, "Despite all the trials in their young lives, they had remarkable spirits. They were joyful, outgoing and kind kids."

Upon returning to Canada, Aaron knew he wasn't finished helping. He decided to run a hockey school near his hometown of Teeswater, Ontario to raise money for the orphans. He reached out to local businesses for sponsorships, organized an operations plan and recruited volunteers. Aaron was able to raise enough money through his hockey school to send all 27 orphans to private school for an entire year; giving them a fighting chance at a brighter future.



A TRSM-led team of students and staff raised over \$17,000 for mental health at the CAMH One Brave Night for Mental Health event. The event was held on campus at the Mattamy Athletic Centre, where students stayed up all night to inspire courage for those affected by mental illness.

Funds raised through the One Brave Night challenge were directed to CAMH in a variety of areas, including: innovative research, public awareness efforts and the ongoing redevelopment of the hospital, including two new buildings dedicated to caring for people with serious mental illness.

# Experiential Learning in Jamaica

**At the Ted Rogers School of Management, shaping diverse global leaders through experiential education that is practical, innovative and socially conscious is a priority.**

The focus of the Jamaica Experiential Learning tourism course was for students to gain a first-hand experience meeting, travelling with, and observing how professionals and policy makers manage and market tourism in a real-world context. Students met traditional mass tourism professionals and enterprises, as well as community-based tourism entrepreneurs.

Building on their Ryerson courses and experiences, students gained an integrated perspective and insight into community development, sustainable economic growth, and other elements that determine the success and challenges that affect hospitality and tourism operations in the Caribbean. Students had the opportunity to learn from stakeholders, as well as to contribute to shaping the development of community tourism.



*From this trip, I have learned so many valuable lessons within community-based tourism that I can apply after graduation. And being able to immerse myself in the Jamaican culture has been a really great experience. I think everyone should come to Jamaica and forgo the resorts to experience community-based tourism because it is something that is mutually beneficial."*

**Hayley Johnson-Skinner**

Hospitality and Tourism Management Student

*"This trip really helped me gain empathy for a completely different culture. It wasn't just reading out of books and thinking "we can change the world." We need to come to an understanding that our ideas should be tailored to the people we are trying to help."*



**Stewart Gray**

Hospitality and Tourism Management Student









By attending the Ted Rogers School of Management, I not only received an excellent education, but I was also able to gain an invaluable set of skills and experiences that extended far beyond what I could learn in a classroom.

**Oluwatobi Taiwo**

Law and Business, 2015

“

This is  
TR

I want to learn how to change the traditional ways of running a retail business and create a new model that earns revenue, while fairly paying every person in the supply chain, regardless of their role or gender.

**Mary Hastings**

Retail Management Student



With the new Co-op Peer Mentorship Program in place, we were able to provide mentors with training to help develop their ability to coach and support their mentees. We also hosted an event to bring together the mentors and mentees to network and celebrate the program's success. Moving forward, every new co-op student will be provided with a peer mentor to help them integrate into the Co-op Program and support them through their first job search cycle.

**Medhat Sedarose**

Co-op Program Coordinator

Students for the Advancement of Global Entrepreneurship (SAGE) Ryerson, helps youth entrepreneurs become innovative problem-solvers and creative thinkers. My role in SAGE was to organize workshop events for these youth entrepreneurs to further develop their businesses. In doing so, our team successfully trained these students to move onto international competitions in the Philippines and Ukraine.

**Tamara Huynh**

Hospitality and Tourism Management Student







I could not have picked a better school. Ted Rogers School of Management and Ryerson University gave me a lot of opportunities and I think a lot of students can echo me when I say that. With the support for awards and scholarships, it definitely helps offset a lot of the stress that is associated with cost. With that comes a lot more student engagement and student experience.

**Nav Marwah**

Former President Ted Rogers Students' Society  
Marketing and Entrepreneurship, 2017

SM

I am so appreciative of TRSM's award and scholarship donors and their belief in the younger generations. Without a doubt, it inspires us as recipients to pay it forward in the future.

**Tolu Falad**

Finance Student



As part of our curriculum, we visited the JD Irving facility to review their operations strategy. We then incorporated it into one of our projects. That is just the kind of experiential learning that Ryerson is known for and far more informative than any classroom lesson.

**Ethan Levy**

Real Estate Management Student

When I was 17, I created the Toronto Anime Film Festival (TAFF). I operated all aspects of running the business from logistics, marketing and managing a team to run the event. TAFF now has an online community of 2,500 and has grossed over \$70,000 – and it's still growing. The natural progression and fit to hone my skills seemed to be TRSM, and I was right. I am involved in the Anime club here at Ryerson and have taken advantage of the Co-op program, which has solidified my career interest in Business Technology.

**Scarlett Sahota**

Business Technology Management Student



# THANK YOU

## Contact Information

Sean Ingram  
Executive Director of Advancement  
Ted Rogers School of Management  
Ryerson University  
Tel.: 416-979-5000 ext. 3445  
[sean.ingram@ryerson.ca](mailto:sean.ingram@ryerson.ca)



**TED  
ROGERS  
SCHOOL  
OF MANAGEMENT**



## 2018 – 2019 Scholar Information

**Lindsey Smith**

123 Smith Road  
Smith, NY 12000

Academic Level - Senior  
Major - Nursing  
Scholarship Amount - \$2,000



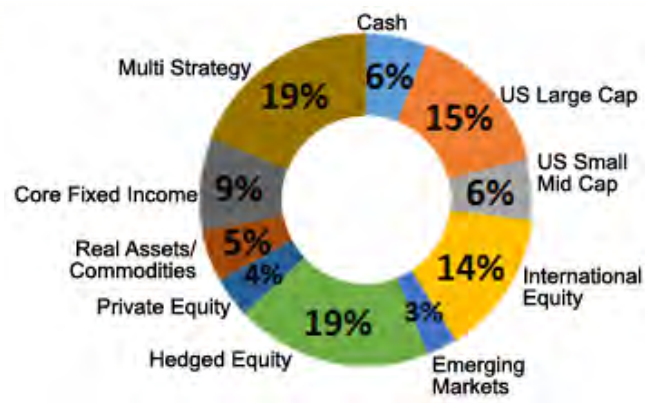
## Sample Scholarship Fund

Endowment Activity for  
July 1, 2017 – June 30, 2018



*We understand the value in having donors and students connect, but have to be very attentive to federal regulations and privacy issues. The Sage Colleges works within federal and state guidelines and legislation to protect our students' privacy. In doing so, we do not release student contact information, without prior consent from individual students.*

## The Sage Colleges Comprehensive Endowment Fund Performance By Asset Class for Fiscal Year 2017-2018



### What are the investment goals for the endowment?

The primary investment goal is to preserve and enhance each endowment's purchasing power while providing funds for current support of programs, students, and faculty at Sage.

### How are endowment gifts invested?

Endowment gifts are invested in the Sage's pooled endowment portfolio, consisting of more than 278 individual endowment accounts. The endowment portfolio was valued at \$XX,XXX,XXX as of June 30, 2018.

### How did our investments do in fiscal year 2018?

Effected by market conditions, the endowment portfolio during the fiscal year ending June 30, 2018 ended with an overall portfolio return of X.X%.

### How are endowments managed?

The Sage Colleges Board of Trustees Investment Committee oversees the investments of the endowment portfolio. Select Sage Board members and donors with investing expertise make up the Investment Committee, which is responsible for setting the investment policies and goals, as well as the mix of investment strategies needed to accomplish the goals. The Committee works closely with an independent consulting firm, LVW Advisors, to select and monitor investment managers. As of June 30, 2018, the endowment was invested with 23 managers.

### How can you get more information on endowments at Sage?

Please contact (*insert name, title, phone, email*) for specific questions related to your endowment.

## Sample Scholarship Fund

Activity Report for July 1, 2017 – June 30, 2018

### Endowment

Beginning Balance	\$24,478
Endowed Gifts	<u>\$2,500</u>
Total HDV	\$26,978

### Market Value

**\$30,451**  
as of 6/30/18

### Income and Expenses

Balance	\$0
Spendable Income	\$1,902
Expenses	<u>\$-1,901</u>
Ending balance (to reinvest or carry forward)	\$0

## GLOSSARY OF TERMS

**Beginning Balance (Endowment)** – Total of gifts to the fund at the beginning of a fiscal year.

**Beginning Balance (Income and Expenses)** – Income remaining (or overspent) from a previous year which was not reinvested.

**Expenses** – The amount distributed to beneficiaries/programs.

**Endowed Fund** – Established when a donation requires gifts to be maintained in perpetuity. Gifts to endowed funds are invested and the investment revenue is used to support the endowment's purpose.

**Endowed Gifts** – Gifts made by a donor during the fiscal year of the report.

**HDV or Historic Dollar Value** – HDV equals the actual cash value of all gifts received since inception of the endowment. The gifts are invested and reinvested. Income generated is used for distribution.

**Market Value** – Actual worth of the endowment fund invested in the general endowment pool as of a specified date. This is determined by the sum of historical gift value and investment revenue or loss.

**Spendable Income** – This is the amount of financial award provided by an endowment each year. The amount is calculated at an annualized rate based on the previous 12-quarter rolling average market value of the respective endowment account. Should a substantial decline in market value occur, the annualized rate may be reduced or suspended in order to preserve the historic gift value of the fund.

**Reinvest or carry forward** – The difference between the income available for distribution and the actual amount distributed is either reinvested or carried forward into the next fiscal year. The fund agreement will determine whether unspent income is reinvested for growth or carried forward for future awarding.

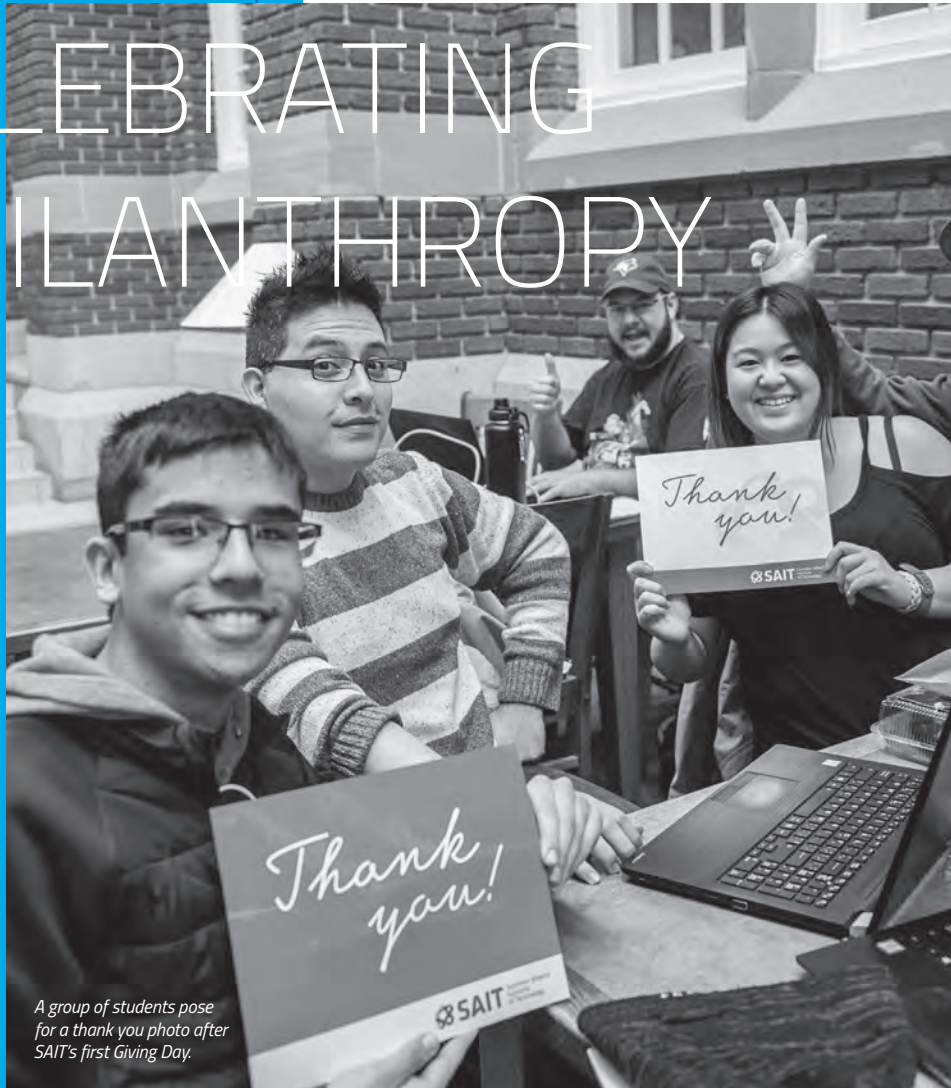




THANK YOU  
FOR YOUR  
COMMITMENT  
TO SAIT IMPACT  
AND OUR  
STUDENTS.

2017/18 Report

# CELEBRATING PHILANTHROPY



*A group of students pose  
for a thank you photo after  
SAIT's first Giving Day.*



Every year on November 15, National Philanthropy Day is celebrated across the world to highlight the accomplishments of individuals and groups who make a difference in their communities. You are a member of the SALT family and we want to take this opportunity to thank you for your commitment to SALT and our students. Whether it was supporting Giving Day, funding a student award, making a gift in kind or contributing to one of our priorities, we appreciate your commitment to SALT and student success.

THANK YOU



IF YOU  
CAN DREAM  
IT, YOU CAN  
ACHIEVE IT.

## STUDENT AWARDS

Through the generous support of our donors, awards are available to all qualifying SAIT students in recognition of academic success, financial need, community involvement, and other areas of success and support.

**\$5.6** million in student awards

**4,600** students received awards

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[sait.ca/donors/ways-to-give](http://sait.ca/donors/ways-to-give)

## GIVING DAY

In 2017, SAIT undertook its first Giving Day. It was a one-day fundraising event that brought the greater SAIT family together for a common cause — supporting our students.

**\$70,105** total funds were raised!

SAIT donors gave \$35,105 in 24 hours. SAIT partner RGO provided a matching donation of \$25,000 in funds, and an anonymous donor provided an additional \$10,000.

**358** donors made a gift to a variety of funding areas on Giving Day.

**516** mentions of #SAITGIVES across Facebook, Instagram and Twitter throughout the campaign.

On Tuesday, Oct. 30, 2018, SAIT held its second Giving Day. Visit the website below to learn how — once again the SAIT family came together to support student success.

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[sait.ca/givingday](http://sait.ca/givingday)



# 2017/18 FINANCIAL REPORT CARD

## 2018 Secured Revenue by Funding Area

\$10,077,875	Capital Projects
\$502,225	Curriculum
\$11,556	Endowments
\$1,896,014	General
\$1,867,342	Gifts In Kind
\$1,012,860	Award – Current
\$1,219,622	Award – Endowed
<hr/>	
\$16,587,494	TOTAL funds raised

## LEGACY GIVING

Earlier in 2018, SAIT was notified it would be receiving the largest donation from an estate in the Institute's 102-year history. Randy O'Dell chose to support SAIT because he believed in the value of a SAIT education for electrical apprentices. When he is posthumously named to SAIT's Heritage Hall Society, Randy O'Dell will join a group of exceptional donors. Members of this growing group of individuals have all included a gift to SAIT in their estate plans to ensure that SAIT remains strong in our second century. This transformational gift is being celebrated during National Philanthropy Week 2018.

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[sait.ca/donors/gifts-at-work](http://sait.ca/donors/gifts-at-work)

## ALUMNI AWARDS

A radio star, a ballerina butcher and a guru of green homebuilding — the three recipients of SAIT's 2018 Alumni Awards share a creative spirit, an innovative streak and a commitment to giving back. As we mark 10 years of the Outstanding Young Alumni Award, this trio of trailblazers is notable for their dedication to inspiring future graduates by serving on SAIT program advisory committees, mentoring students and supporting scholarships.

### **DISTINGUISHED ALUMNI**

Connie DeSousa, PCK '00  
Ryan Scott, BA '01

### **OUTSTANDING YOUNG ALUMNA**

Jennifer Dalen, RTBN '12

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[sait.ca/alumni/alumni-awards](http://sait.ca/alumni/alumni-awards)



BELIEVE  
YOU CAN  
AND  
YOU ARE  
HALFWAY  
THERE.



# 2017 GRADUATE EMPLOYMENT SURVEY

**4,547** students graduated

**93%** of graduates surveyed were  
satisfied or very satisfied with the  
quality of their educational experience

**96%** would recommend SAIT to others

**90%** employed



*New alumni wait at the Jubilee Auditorium for the convocation ceremony to begin.*

## TRADES AND TECHNOLOGY COMPLEX FIVE YEAR ANNIVERSARY

In 2012, our generous donors provided us with a 740,000-square-foot expansion befitting our stature as one of Canada's top technical institutes. The Trades and Technology Complex celebrated its fifth anniversary in 2017/18. To commemorate this milestone, we delivered the report, *Trades and Technology Complex – Five years of gratitude.*

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[sait.ca/donors/donate-to-sait/reports-to-donors](http://sait.ca/donors/donate-to-sait/reports-to-donors)

## STUDENT CALLING PROGRAM

As part of our Annual Giving program, students from the SAIT Student Calling Program contacted alumni throughout the year to hear about their experiences at SAIT, provide updates on current events and campus developments, answer questions, and raise financial support for the Institute and our students.

**28** student callers in 2017/18

**156,488** calls

**29,522** alumni and donors reached

**\$31,315** raised

**\$60.57** average gift per donor

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[sait.ca/donors/ways-to-give](http://sait.ca/donors/ways-to-give)

# ALUMNI BY THE NUMBERS

**242,287** alumni

**89%** of alumni live in Alberta

**851** staff are alumni

**1,470** alumni gave back to SAIT in 2017/18

**61%** of all donors were alumni in 2017/18

Oldest known living alumnus **103**

Second oldest known living alumnus **100**

Youngest alumnus **2**

*Mohammad Falak Sher was the first baby born in Calgary on SAIT's 100th birthday in 2016. Thanks to a gift from SAIT partner, Mawer Investment Management, Mohammad received a scholarship to attend SAIT. We can only imagine what the jobs of the future will be — but we can't wait to see him on campus!*



## FAMILY CAMPAIGN

Every year, the SAIT family comes together to help our students succeed. They support the SAIT Opportunities Fund, the SAIT Student Success Fund and more than 20 different student awards.

**\$110,000+** raised

**371** staff and faculty participated (20%)

**841** Shout Outs – celebratory messages to colleagues

## AFFINITY PARTNERSHIPS

SAIT enjoys affinity partnerships with several companies which allow us to extend high-value products and services at low group rates to alumni, staff, faculty and, in some cases, SAIT retirees.

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[sait.ca/alumni/alumni-perks](https://sait.ca/alumni/alumni-perks)

## CORPORATE ENGAGEMENT

In 2018 SAIT established a Corporate Engagement Office with one express purpose – to provide support to businesses. This one-stop-shop approach will help businesses connect with us and with other companies to find the solutions they need.

**11,000** industry partners

**200+** organizations worldwide take advantage of our training programs

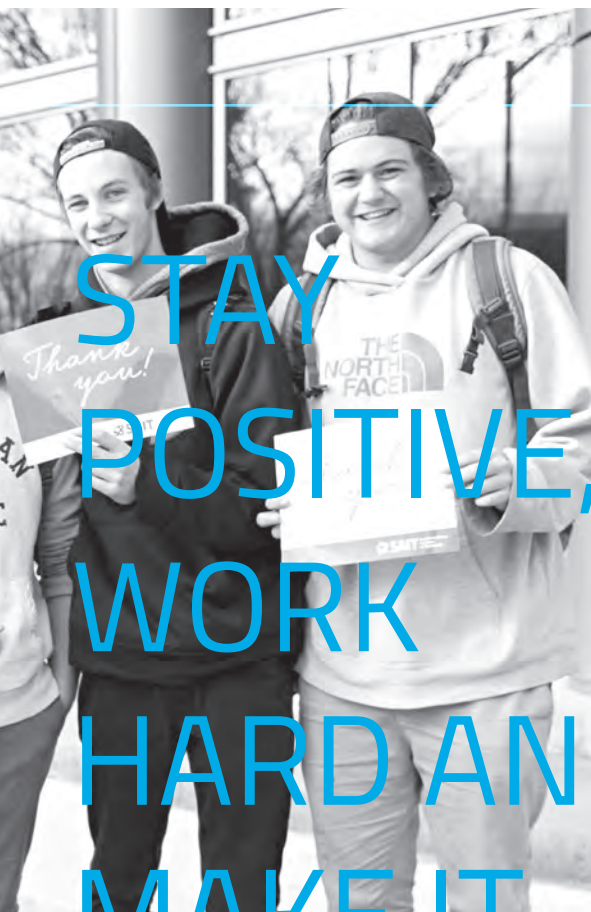
**100+** industry and government applied research projects

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[sait.ca/industry](https://sait.ca/industry)



*A group of students pose for a thank you photo after SAIT's first Giving Day.*



STAY  
POSITIVE,  
WORK  
HARD AND  
MAKE IT  
HAPPEN.

## PRESIDENT'S AWARDS

At the 2018 President's Dinner in March, SAIT President and CEO David Ross welcomed a distinguished group of partners, volunteers and student leaders as recipients of this year's President's Awards.

- President's Partnership Award: The Brawn Family Foundation
- President's Student Leadership Award: The SAIT Accounting Society and the SAIT Great Northern Concrete Toboggan Race Team
- President's Medal: Akhil Sharma, Architectural Technologies '18

## COMMUNITY FOR CHANGE

Learn about real people in the SAIT community who are supporting student success. Follow the conversation on our social channels.



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@SAITAlumni



Nicole McMillan, Team Lead, Stewardship, SAIT Alumni and Development  
403.284.8925 | [nicole.mcmillan@sait.ca](mailto:nicole.mcmillan@sait.ca)  
1301 – 16 Avenue NW, Calgary AB, T2M 0L4  
[sait.ca/alumni](http://sait.ca/alumni) | [sait.ca/donors](http://sait.ca/donors)

*Note: We take our fiscal responsibilities seriously, and are proud of our track record in managing donor funds.  
In 2017/18 we invested \$2.24 million in fundraising activities and raised \$16.6 million.*





# Philanthropy Impact Report 2017





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# Why Teach Philanthropy at Scotch — and How?

Reading, writing, 'rithmetic... and philanthropy?

Granted, philanthropy is not the first topic that comes to mind when thinking about standard offerings at independent schools. But increasingly, students studying humanities, social or hard sciences, or business can learn about philanthropy, and it's easy to see why. Philanthropy Australia estimates that 14.9 million Australian adults (80.8% of the population) gave \$12.5 billion to charities and not-for-profits organisations in 2015-16.

Australians contribute their time, talent, and especially, treasure in philanthropic ways. The term philanthropy, the Greek for "love of humanity," captures the virtuous thrust of giving and giving well. But for some, the 'love for humanity' just does not cut it. They question why a well-resourced school like Scotch needs philanthropy. The answer is fourfold: our ambitions, needs, wants and impact.

We are an ambitious school determined to make an impact. Like every great educational institution, these aspirations are achieved through philanthropic partnership. Last year Eton College (UK) raised GBP5.2m, while Phillips Exeter Academy in the US raised US\$6.67M. Scotch Melbourne Foundation has assets of \$49.6M and has secured an additional \$10.3M for its Building Fund. Like these other schools, we are uniquely positioned and deeply committed to making transformational impact through our students.

Our school also has needs. Our annual income is around \$25 million. 20% roughly comes from state or federal government. The rest comes from fee income. We demonstrate robust financial health and generate a surplus each year.

However, once we cover our running costs (salaries being the major part), and service our debts, we are left with enough to refurbish a set of classrooms, renew furniture, deal with small, but high priority infrastructure demands and make progress with some very unsexy yet essential fundamentals like bore water systems. Our Investment Committee oversees our long-term reserves. However, these funds are mainly committed to scholarships and we never spend the capital.

We don't own large amounts of property in the CBD that provides regular income nor have any undiscovered Assyrian mosaics sitting on the back wall of the canteen worth 8 figures (trust me, we have looked)! We equally do not intend to sell precious land and lose for ever the family silver.

So, if we are to radically change our infrastructure, if we are to build the next McBean Centre, Rosevear House or Webb Science Centre, to support our future needs, we need to raise funds – big funds – through philanthropy. In other words, we need your support. And as this report shows over the next few pages, we are getting it...

Last year a new benchmark was set at Scotch in both amounts given and participation. Nearly 800 members of our community either gave to Scotch or gave through Scotch to other charitable organisations. We are tremendously grateful for these gifts and determined to make sure that they are used to enhance and grow our programs.

Lastly, because we are also a school and because philanthropy can be learned, we want our students to learn it.

Research by the University of Maryland highlights how seeing one's parents give can influence later giving and altruistic behaviours in children. Witnessing an influential adult engage in philanthropy is most effective in passing along the importance of helping others. This teachable moment is intensified when coupled with discussion about the importance of such actions.

If giving is teachable, then the school years represent a tremendous opportunity to instil such behaviours in the next generation. Think of the impact we could make, if we were all more savvy about philanthropy. As taxpayers are increasingly less willing to fund public giving, everyone in the non-profit world has to get out and make the case for why we are deserving of funds. The rise in social media fuels a need for us to be vivid, authentic tellers of our own story. The key to successful philanthropy is understanding and telling the story of what the problem is, why the giver is the best person to respond to the problem, and why the recipient is the best candidate for solving the problem.

I want to thank each one of you, for partnering with us to enable an exceptional Scotch education. I believe that today's students, taught the principles of giving and serving humanity, and even given a chance to take those principles out for a spin thanks to the generosity you have demonstrated, will find new ways to improve our nation, surprise us, and make us proud.

**Dr John Newton**  
*Principal*



# Thank You – A Record Year of Participation!

When you look at top schools around the world, they all boast of consistently high levels of community support. It is true that ‘it takes a village to raise a child’, and it is particularly true of Scotch. However in the past, despite these tremendous high levels of community support and the willingness of people to give their time, very few were actually donating to Scotch. To address that issue, in 2017 we focused firmly on broadening the level of participation in our annual appeal. If we could help our community understand that we would value their philanthropic participation, no matter the size of their gift, we felt we would make real traction in establishing a culture of philanthropy.

**And the community responded in a fabulous way. Not only did we quadruple the level of community involvement, but we also raised nearly twice as much as we did the previous year. With a challenge gift of \$25,000 and twin focus on the Future Skills Farm Centre and providing financial support for merit based and needs based scholarships, we raised just over \$200,000, with about 2/3 of the money raised being designated for the building project.**

Given the importance of our Ag Science program, the level of support this received and the high level of participation in this year’s annual appeal, we have asked architects DesignInc, to provide us with detailed architectural designs for this project.

We remain committed to embedding Richard Bell’s vision of food processing and farm technology in the design, but are working to ensure that the new facility also supports the evolving curriculum needs of our Live Well program. Though the facility will be located on the Torrens Park Campus, our desire is that this facility be utilised by students of both campuses, and the design needs to support all of those aspirations. We will have more to share in due course and the current timetable has us executing this project by the end of 2019.

On the scholarship front, I am pleased to report that with prudent investment, the scholarship endowment fund has grown to just over \$2.6 million and the Foundation is expected to contribute over \$100,000 this year to help defray the \$1 million that the College invests in needs and merit based scholarships every year.

While still years away, I look forward to a future where the entire cost of our scholarship program is covered by the earnings of the scholarship endowment corpus, thereby freeing the College to redeploy that amount every year to where it is needed most. Thanks to your support, we get closer to that goal every year.

Beyond the participation and monies raised, it created positive ripples throughout our community as well as an expectation that we could all do even better in 2018!

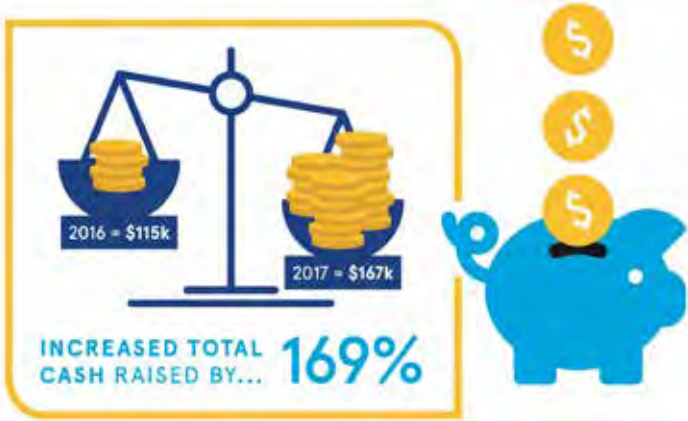
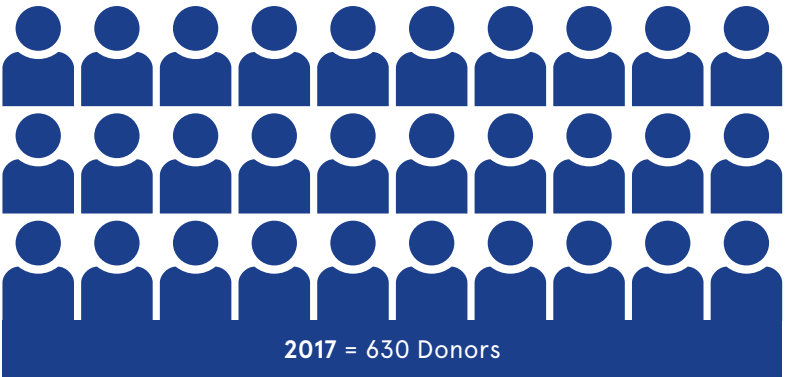
As a valued member of our community, I wanted to make sure you were aware of how grateful we are for all of your support and update you on the impact of your philanthropy on the College. You will be pleased to know that we expect the Philanthropy Impact Report to be an annual publication, going forward, and I would deeply appreciate your feedback on this publication, which not only recognises all our supporters by name, but also underscores why philanthropy is so critical for the College’s future.

Thank you for all that you do for Scotch.

**Abhra Bhattacharjee**

*Director of Philanthropy and External Relations*

INCREASED PARTICIPATION  
OVER LAST  
YEAR BY... **420%**



**+45%**  
STAFF  
CONTRIBUTED  
TO THE APPEAL



CHALLENGE GIFT  
BY AN ANONYMOUS  
APPEAL DONOR

**+\$25K**  
WHEN WE ACHIEVED  
**>400 DONORS**  
TO THE APPEAL



# The Impact of a Scholarship

## Hamish Archibald '00, Scholarship recipient

As a recipient of one of the Foundation scholarships, my experiences at Scotch in my time as a student and within the Scotch Community since have been incredibly rewarding and enjoyable. It provided an exceptional foundation to build my career and the many great teachers I was exposed to had a positive and formative influence on my life. Being awarded this scholarship meant that both myself and my twin brother were able to come to Scotch, an opportunity that we may not have had otherwise.

*After graduating from Scotch, Hamish completed a Bachelor of Laws and Legal Practice and a Bachelor of Commerce at Flinders University. Today, Hamish is a Partner at O’Loughlins Lawyers and also serves as the President of the Scotch College Old Collegians’ Association.*



## Helen Lowrie '86, scholarship recipient and Scotch parent

Our children went to the local primary school, which was a very community spirited school and it was hard to find a high school of the same nature. That’s why my husband and I, as the cycle of life would have it, decided to send our kids to Scotch. One of the wonderful aspects of people giving to Foundation, is that your support gives people the opportunity to come to such a wonderful school. I am forever grateful of the opportunity to come to Scotch on a scholarship and thrilled to be back at the college as a parent.

*Helen has been heavily involved in the Scotch community since leaving school in 1986. She completed a Bachelor of Business Property at UniSA. Today she runs a housing business, Sarah Homes, with her husband Paul. Helen is mum of Oscar ('15), Charlie ('17) and Meg ('21) and she volunteers regularly in the school canteen.*

**“Let us think of education as the means of developing our greatest abilities, because in each of us there is a private hope and dream which, fulfilled, can be translated into benefit for everyone and greater strength for our nation.”**

John F. Kennedy

# What a Difference a Grant Makes!

Scholarships are all about transformation, and the Bird in Hand grant takes it to a whole new level. Targeted at students who would never be able to attend Scotch for financial reasons, or lack of family support, the grant covers full tuition, as well as all ancillary costs of attending Scotch for a deserving student. It also provides them with certainty of support by assuring funding for the entirety of their middle and senior schooling at Scotch.

This grant is the result of philanthropy by the Bird in Hand Foundation, established by Scotch parents, Andrew and Susie Nugent, as well as donations by the Goggin-White family. Motivated by the opportunity to make a difference, they approached Scotch and have worked closely with the College to establish this grant. They have met the recipient and witnessed the difference their philanthropy has made. *“We are grateful for the experiences and opportunities our family has had at Scotch,”* said Andrew Nugent, *“and this was a way to help another young person go and change the world”*.

One of the two current recipients of the Bird in Hand grant is a student from the Northern suburbs who wants to be a lawyer, to be able to help people in light of the difficult situations she has experienced. Overcoming a number of challenges, including lack of family support, and limited access to services that would otherwise enable her to be successful, this recipient has had her life transformed through the provision of this scholarship.

*“This is a 110% scholarship that has resulted in a 180 degree change”*, says Ian Steel, OAM Scotch parent and CEO of Kickstart for Kids, who helped Scotch identify and secure this grant recipient. *“This is a great combination of an incredible opportunity being provided to an incredibly brave person, who is determined to grab it with both hands, not just for personal benefit, but to impact those that depend on them”* he added.

Dr Kelly Sharp, Head of Middle School and Assistant Head of Torrens Park Campus, coordinates a team of staff to provide a network of support for the grant recipient. *“A lot of people are focused on the transformation this has had on the student, but on a daily basis I see the tremendous impact she is having on our Middle School community. Our students learn so much from experiencing difference, and this is a great outcome for everyone”*.



**The Nugent family:** (Left to right) Andrew Nugent, Lalla (Y11), Oscar (Y6), Ted (Y9) and Susie Nugent. Photo: <http://www.birdinhand.com.au/>



**The Goggin-White family:** (Left to right) Clodagh Goggin (Y11), Mary White and Michael Goggin. Photo by Sandra Patterson



# Care & Compassion: Philanthropy Through Scotch

It is important that we begin to think about care and compassion as values and behaviours to live by and not just register them as words to check off as if we simply automatically possess them. Compassion is more than feeling pity for someone and it is not just about being empathetic. Compassion is about truly trying to care and help another person with their situation.

Care is about providing what is necessary to make someone’s life better, seeing how you can assist in a practical and thoughtful way. It is important to care for those around you. Not only does it make you feel good but also because you can. At Scotch, we provide a lot of care and demonstrate compassion for our community both internally and beyond. We not only hold many fundraisers to help charities and causes but we also strive to make sense of the connection between us and what we are raising funds for.

Every time we do an action at Scotch we are not just doing it for ourselves or to give some money but we are becoming part of the conversation.

All conversations about things that matter start with awareness raising and it is our hope that we can take that idea one step further.



Let’s forget our first world problems for a while and remember that being here is about wanting to make a difference not just be a nice person. Our belief is if we treat others with care and compassion then we will be able to build our community to new heights. Over the year, we were excited to work with various groups in the College to not only care for our own community but work to raise awareness, take actions and show that we have responsibility to our wider world to make it a better place. There are many opportunities to do this at Scotch and we are proud to lead the challenge...if not us... then who?

by 2017 College Co-Captains,  
Eleni Vrodos and Oscar Martin

Charity / Organisation	Students Involved	\$ Raised
Beyond Blue	Middle & Senior School	\$325.00
Blaze Aid Inc	Middle & Senior School	\$50.00
Cancer Council SA	Senior School	\$2,050.00
Daffodil Day	Junior School	\$570
DEBRA	Junior School	\$6,715
Down Syndrome SA	Middle & Senior School	\$70.00
Hutt Street Centre Foundation	Senior School	\$1,231.50
Leukaemia Foundation	Middle School	\$24,944.50
Philippines Fundraising	Year 12 2017	\$7,781.92
RUOK Limited	Middle & Senior School	\$112.95
Salvation Army Red Shield	Middle & Senior School	\$3,555.00
Sea Shepherd Australia	Senior School	\$550.00
United Way SA	Junior School	\$6,715
White Ribbon Foundation	Year 11	\$2,500.00
World Vision (sponsor child x7)	Junior, Middle & Senior School	\$4,032.00
World Vision 40Hr BackPack Challenge	Middle & Senior School	\$1,800.00
Yalari	Senior School	\$5,000.00
TOTAL RAISED		\$68,002.87

# Student Fundraising Efforts Across the College in 2017



From top left corner: (1) Mitcham Campus students buying flowers for Daffodil Day. (2) Mrs McCarthy taking part in the World’s Greatest Shave for the Leukaemia Foundation. (3) Mini ‘Walk a Mile in My Boots’ – Hutt St Centre fundraiser on campus. (4) Year 12 students on service trip to Laos. (5) RUOK Celebrations in the Middle School. (6) Small group of students who participated in the Red Shield Appeal. (7) Students who waited on tables for the fundraiser to send money to the Philippines. (8) Scotch students participating in the ‘Walk a Mile in My Boots’ city walk for the Hutt St Centre. (9) Students who helped pack books to send to the Philippines -Apayao Community Learning Centre – through South Pacific School Aid volunteers.



# The Gratton Society

The Gratton Society is made up of people who have made a gift to the School in their Will. Members of the Gratton Society are listed on the Gratton Society Board in the Drawing Room of Torrens Park House and are presented with a special scarf or tie to commemorate their contribution.

## Cross Estate Planning Off Your To-Do List

A new year will offer a fresh start on your personal goals and resolutions. It’s also the perfect time to take stock of where you’re at in your estate planning.

Making a gift to Scotch in your will is a very special act of generosity and foresight, and we honour individuals who do this with membership of the Gratton Society, named after Scotch’s first and longest serving Headmaster. If you’ve already included a gift to Scotch in your will, please let us know of your intentions.

## Who Leaves Gifts in Wills?

Throughout our history we have received gifts of all sizes, shapes and forms. You don’t have to be wealthy to leave a gift in your Will. Your gift, no matter the size, combined with those of other supporters, will have a powerful impact. Every gift, however small or large, is important and allows us to plan with confidence and to support students through scholarships and bursaries.

## How to Leave a Gift in Your Will?

If you would like to establish a lasting legacy at Scotch there are a number of methods that may suit you. We would be happy to discuss the process and your ideas with you. All enquiries are treated in confidence. To discuss this further, please do reach out to Ken Webb on +61 8 8274 4335.



## Gratton Society Members – Partnering to Build the Future

Mr P Abeles*	Mr M Harrington	Mr M Smith
Mr A Angus	Dr J Harris	Mr K Smith*
Mrs S Angus	Mr J Hosking	Ms M Stevens*
Mr R Arrowsmith*	Mr C Humble	Mr M Taylor*
Mrs D Barron-Davis	Mr A Just	Mr H Trumble
Mr D Bell	Mr J Kramer	Mr S Van Staveren*
Mr R Blanchard	Mr R Law	Mr J Walker
Mrs S Chase	Mr J Little	Mr J Walter
Mrs C Clayton*	Miss C Llewellyn-Smith	Mr F Warwick*
Mr J Clayton*	Dr I Llewellyn-Smith	Mr K Webb
Mr J Cleghorn*	Dr M Llewellyn-Smith AM	Mrs D White*
Mr R Cottle*	Mr R Love*	Mr J White*
Mrs M Cottle	Mrs M Love	Mr S Williams*
Mr R Coxon	Mr E Martin-Donald*	Ms R Wilson
Dr R Craig	Mr G Mayfield	Mr J Wood
Mrs P Davidson*	Mr M Minervini	Mr T Wood*
Mr J Duggin	Mr A Osmond	Mr R Worth*
Mr C Dutton	Mrs M Osmond	Mr E Wylly*
Mr A Edmonds-Wilson	Mr F Pemble-Smith	Mr H Young*
Mr D Freebairn	Mr R Pentelow*	Mrs W Young
Mr J Freebairn*	Mr E Raggatt*	Dr H Zelling AO CBE QC*
Mrs S Freebairn	Mr S Rickards	
Mr J Gardiner*	Mr R Ross-Smith	
Mr L Gilbertson*	Mr P Routley	
Mr F Goldman*	Mr G Sandford	
Dr M Gratton*	Mrs M Sandford	
Mr G Gratton*	Dr A Seymour	
Mr P Griffiths	Ms T Siekmann	
Mr C Hamilton*	Mrs C Smith	

\* denotes deceased

# The Scotch College Foundation

## Assuring Success and Financial Transparency

The Scotch College Foundation was established in 1988 to support the strategic direction of Scotch College through philanthropic activities.

The Foundation’s first project was the development of the Multi-Purpose Hall on the Mitcham Campus in the 1990s and since then, through its Building Fund, the Foundation has helped raise over \$7 million towards building projects such as the Webb Science Centre and the Rosevear Boarding Precinct.

Through its Education Fund, the Foundation also helps fund a number of student scholarships to Scotch College Adelaide, to enable meritorious and deserving young people to benefit from a Scotch education.

The two main functions of the Foundation are to invest and allocate funds on behalf of the School and to raise funds to support and resource the school, now and into the future.

## Foundation Membership

Membership of the Foundation is open to all donors who have cumulatively given \$5,000 or more.

There are different levels of Foundation membership, based on an individual or organisation’s cumulative level of giving.

**For more information about The Gratton Society and the Scotch College Foundation, please contact the Philanthropy Office on +61 8 8274 4335 or [cnewton@scotch.sa.edu.au](mailto:cnewton@scotch.sa.edu.au).**

Guardian	\$500,000
Governor	\$250,000
Patron	\$100,000
Benefactor	\$50,000
Trustee	\$25,000
Fellow	\$12,500
Member	\$5,000







Dale Bennett and Gillian Henshaw



John Heard and Raymond Spencer



Catherine Skinner and Teresa Hanel



Dr John Newton and Rory Linehan



Raymond Spencer, Sue Chase, Andrew Saies and Ric Mollison



Brian and Rosmery Sawley and Graeme and Gay Footer



Warren and Barbara Fargher



Andrew Saies, Dr John Newton and Andrew Freeman



Alan Key, Sophie Camens, Phil Camens and Richard Willson



Bec Hodgson, Di Nickless and Judy Arnold



Anita and Andrew Just



Abhra Bhattacharjee and Alex Nunn



Diana Lawrence and Cathy Johnson



Michael and Mandy Hooper, Peter Tulla and Andrew Nunn



Ken Webb, Rick Goode, Mark Birchby, Dave Cosh



Rose Wilson, Diana and John Walter



Geoff and Marlies Sandford and Blaine Gordon



Peter and Heather Tulla



George Legoe, Natalie Felkl, Mark and Marianne Legoe and Anne Legoe



Simon Firth, Anthony Pike, Karen Franks, Sue Chase and Chris Firth

Thank you for your generosity and support during 2017.

Some of our supporters spotted at Thank You Drinks on 16 November 2017.



# Your Annual Appeal Donation at work

## Scholarship Endowment Fund

One third of all annual appeal donations in 2017 went to the Education Fund, helping the permanent Scholarship Endowment Fund grow.

The Endowment Fund enables the Scotch College Foundation to provide merit-based and needs-based scholarships to deserving students at Scotch, recognising real achievement as well as meeting real need.

## Building Fund Donations (The Future Skills Farm Centre – Expected 2019)

In 2017, two thirds of annual appeal donations went towards establishing a new Future Skills Centre on the Farm on the Torrens Park Campus, which will help Scotch students to understand and get involved in where their food comes from.

This new facility will not only focus on food production, but also will enhance our winemaking program, teach new technology skills, enable sustainable environmental practices and train students in safety and compliance practices.

*If you would like to make a tax deductible donation to the College, please contact the Philanthropy office on +61 8 8274 4335 or donate online at [www.scotch.sa.edu.au/donate-online](http://www.scotch.sa.edu.au/donate-online).*



# 2017 Honour Roll

We are grateful for every single donation we received in the 2017 calendar year. The following lists includes those who made a tax-deductible gift to either the Building Fund or the Education Fund and were happy for their contribution to be publicly acknowledged. The list does not included the many other forms of volunteer support, giving or sponsor support received by our different support groups, for which we remain very grateful.

## Education Fund Donations (Scholarship)

Mr P Abeles	Mrs S & Dr J Craven	Mrs R & Mr M Healey	Mr A Harris & Ms F Lyons-Reid	Dr C Roeger
Mr D Albano	Mr S Croxton	Mr A Heithersay	Mr R Maeder	Mrs K Roeger
Dr C Alderman	Mr B & Mrs L Dackiw	Mr S Heysen	Mr J & Mrs R Maine	Mrs Y Rosevear
Mr B & Mrs J Arnold	Ms X Du	Mrs R Hill-Ling	Mr B & Mrs J Martens	Mr A Saies
Mr R Arrowsmith	Mrs A & Mr B Earl	Prof R Hosking	Ms E Mather	Mr G & Mrs M Sandford
Ms A Badger	Mrs V Edwards	Mr W Huang & Ms L Jian	Mrs S McIntyre	Mrs E Sauer
Dr D & Mrs M Ball	Mr H Ellwood	Mr A Hubmayer	Mr M & Mrs K McKay	Mr G & Mrs M Sauer
Dr K Bannister	Mr J Freebairn	Mr A & Mrs K Hubmayer	Mr G McLeod	Mrs L Sellars
Mr D & Mrs N Beckman	Mr D Freebairn	Mrs E Hunt	Mr R & Mrs M McRitchie	Dr A & Mrs J Seymour
Mrs M Bok	Mr A and Mrs P Freeman	Mr J & Mrs P Jackson	Mr P & Mrs K Mewatana	Dr K Sharp
Ms D Bonner	Miss G Freeman	Mr B Jantzen	Mrs R Mitchell	Dr T Smith
Mrs K Booth	Mrs W Freeman	Mr A Jarvis	Mrs P Mosel	Mr M Staker
Mr A Bourke	Mrs L Galea	Mr M & Mrs J Kelly	Mr S Mudie	Mr R Stanley AM
Mrs S Brice	Mr P & Mrs J Gipps	Mr H Kennedy	Mrs B Mumford	Mr R & Mrs D Stone
Mr S Bruschi & Ms K Ramsey	Dr M Goggin & Dr M White	Mr J Kopias	Mrs J Newbegin	Dr P Subramaniam
Ms E Burnett	Mr N Gordon	Mrs L Kramer	Mr W and Mrs J Newbegin	Mr N & Mrs K Sutton
Mr T & Mrs J Burton	Mr P Griffiths	Mr S Kramer	Ms B Nickels	Mr E Taylor
Miss S Camens	Mrs R Griffiths	Mrs A Lambert	Ms D Nickless	Mr C Trigg
Mr T Camens	Mr J Haigh	Ms A Lane	Mr F & Mrs M O'Neill	Mr P & Mrs H Tulla
Mrs A Canny	Miss I Hampson	Mr I & Mrs S Lane	Mr S Pafumi	Mr H Tymko
Mr P & Mrs S Canny	Ms T Hanel	Dr D Lawrence	Ms T Pagsanjan	Mr A Wallace
Mr B Carr	Mr J Hani	Mr R & Mrs B Laycock	Mrs R & Mr L Pawson AOM	Mr J & Mrs D Walter
Mrs S Chase	Mr A & Mrs L Harris	Mrs M Legoe	Dr M Perugini	Mr C Wang
Ms E Christie	Mr P Harvey	Mr M Legoe	Dr A & Mrs R Pouw-Bray	Mr Z Wang & Mrs Y Li
Mr D Cosh	Mr M Harwood	Ms E Lindsay	Mrs M Quin	Mr K and Mrs L Webb
Mrs P Cosh	Mr R Haslett	Miss C Llewellyn-Smith	Mr A & Mrs C Ralph	Mrs E J Williams
Mrs M Cottle	Mr D Hatter	Mr R & Mrs M Love	Mrs S Read	Mr J Wilson
Mr R & Mrs M Coxon	Dr E Haverhoek	Mr D Lynch	Mrs H Rickman	Miss D Young
				Mr R & Mrs J Young

# 2017 Honour Roll (continued)

## Building Fund Donations

Mr S Abbey	Mr J Blieschke	Ms R Carpenter-Mew	Dr T & L Dodd	Mr M Fotheringham	Mrs B Halloran	Mrs M Kelton	Miss E Lawrie	Ms F Marzi	Dr R Naish
Ms B Adams	Mr R Blinco	Mr A Carr	Mrs S Donovan	Mrs G Francis	Miss H Hamilton	Mrs J Jeffries	Mr A Laycock	Miss S Maslin	Mr T Naish
Miss H Adams	Mr F & Mrs M Bloch	Mr J Cathro	Mrs E Drew	Ms A Fraser	Mr H Hammond	Mr N Johnson	Mr S Lefevre	Mrs S Matz	Mr M Neck
Mr P Adams	Mr G & Mrs L M Bolnar	Mr T & Mrs R Chapman	Mr L Drew	Miss C Freeman	Mr Y Han	Miss S Johnson	Mrs A Legoe	Mr B Mawby	Mr P Neighbour & Ms H Lowrie
Mr C & Mrs E Addams-Williams	Mr H & Mrs A Bone	Mr B & Mrs D Charlton	Ms X Du	Mr H Freeman	Mr B Hanna	Mr C Just	Mr G Legoe	Mr N Maxwell	Mr L & Mrs F Nesci
Mrs J Aiello	Mr G Booth	Mrs S Chase	Mr G Durrant	Ms S Freeman	Miss L Harrington	Miss C Just	Mr B Li	Mr G R Mayfield	Miss J Newbegin
Mr D Albano	Miss G Borg	Miss G Ciampa	Durrant Co Pty Ltd	Mr D Fryar	Ms S Harrington	Miss H Just	Ms C Liddy & Mr C Baczynski-	Mr K Maynard	Dr J & Mrs C Newton
Mrs C Alderman	Mrs M Borg	Mr B Clarke	Mr G & Mrs K Durrant	Mr T Fuss	Mrs S Harris	Mrs K Just	Hopkinson	Ms A McCarthy	Mr S Nicholson
Copyworld	Mr M Borg	Mr T Clarke	Mr M Ebbinghaus	Dr A Galanopoulos	Mr L Harvey	Mrs K Just	Mrs K Lindner	Mr R McEwin	Mr B Nilsen
Miss C Andersson	Ms T Bornhoeft	Ms K Cleary	Mr P & Mrs A Ebbinghaus	Mr J & Mrs J Garrod	Mr R Haslam	Miss L Just	Dr R Linehan	Miss G McIntyre	Miss L Nolan
Miss R Andrews	Mrs J Bourne	Mrs K Cliff	Mr W Edmonds	Mrs F Gibbs	Mrs C Heard	Mr N Just	Mr J Lines	Mr A McKenna	Mrs S Nugent-English
Miss L Ansaar	Ms A Bowden	Mr D Coldwell	Mr S Edmonds-Wilson	Mr B Gibson	Mr J & Mrs A Heard	Mr O Just	Mr J & Mrs A Lines	Mr S McKenzie	Mr B & Ms A Nunan
Mr H Archibald	Mr N Bowen	Mrs E Coleman	Miss B Elliott	Mr J & Mrs J Gibson	Mr D & Mrs S Heinjus	Mr T Just	Mr D Linke	Mrs H McKinnon	Ms A Dimos & Mr A Nunn
Mr L Archibald	Mr C Bradley	Mr C Coleman-Jones	Mr H Ellwood	Miss M Gibson	Mrs G Henshaw	Mrs K Kaesler	Mr T Linke	Dr J & Mrs T McLean	Mr B Nunn
Mr A Craddock & Mrs M Ash	Mr C & Mrs P Brake	Ms T Colliver	Mr N Emmett	Mrs C Gill	Mrs A & Mr K Hentschke	Mr S Kasbergen & Ms M Sheldon	Mr J Little	R M McLeod	Mrs J Nunn
Prof G & Mrs S Atkins	Miss L Brake	Mr A & Mrs S Colyer	Mr T Emmett	Mr P Gill	Mrs N Hicks	Mr M Kelly	Ms M Littlejohn	Mr P & Mrs J McNeece	Mr L Nunn
Mr C Bailes	Mr G Brookman	Mr C & Mrs A Comerford	Mr F English	Miss E Glynatsis	Mr R & Mrs D Hill	Miss A Kemp	Miss L Littleyuile	Mr P Menzel	Miss Z Nunn
Mr H Bailes	Mr G Brooks	Mr M Coombe	Mrs M Evans	Miss N Glynatsis	Mrs B Hillier	Mr A & Mrs N Key	Mr P Littleyuile	Mr J Merrigan	Mr B O'Donnell
Mrs P Baker	Mr A Bruce	Mr Z Cooper-Baldock	Mr W & Mrs S Evans	Dr P & Mrs M Glynatsis	Mr H Hollams	Mrs M Kidman	Mr M Lloyd	Mr P & Mrs H Messner	Mr M O'Donnell
Mr P Barry	Mr A Bruschi	Ms R Courtney	Mrs B Ewer	Miss S Glynatsis	Mr N Hollams	Miss D King	Dr B Lorraine	Mrs J Miegel	Mr O O'Donovan
Dr J & Mrs L Bastian	Mr S Bruschi & Mrs K Ramsay	Mrs C Cousar	Mrs E Ewer	L J Elliston	Miss D Holmes	Mr H Kitt	Mr R Lotze	Mr R Miotti	Mr B O'Grady
Mr B Beamond	Ms G Budich	Mr R Craig	Dr Marty Ewer	Mr N Goode	Mr L Holmes	Dr M Knight	Mr A Love	Mitcham Historical Society Inc	Ms A Oldford
Mr D Bell	Mr J Burgess	Mrs S & Dr J Craven	Miss S Ewer	Mr R & Mrs P Goode	Miss R Holmes	Ms B & Mr D Koch	Mr H Lu	Miss A Mitchell	Mr D O'Neil
Mr R & Mrs M Bell	Mr H Burns	Mr J & Mrs K Crosby	Mr W & Mrs B Fargher	Mr M Goreham	Mr S Holmes	Dr K Koukourou	Mrs D Lucas	Ms B Mitchell	Mr A & Mrs P Ouwens
Mr H Belle	Mr N Byrne	Mr J Crowe	Mrs L Farnham	Ms A Gozalo	Miss A Hooper	Mr B & Mrs V Kramer	Mr A & Dr M Ludlow	Mrs K Mitchell	Mr M Pafumi
Mr D & Mrs J Bennett	Mr B Calder	Mrs C Cummings	Ms J Farrer & Mr A Lugna	Mr J Grant	Ms M Hooper	Mr J Kramer	Miss K Luscombe	Mr P Mitchell	Mrs S & Mr P Paterson
Miss L Bennett	Mr A Camens	Mr P Cuthbertson	Ms S Farrington & Mr C Hill	Mr P & Mrs K Greenfield	Mrs M & Dr M Hooper	Mrs K Kumnick	Ms J Lynn	Tony Mitchell	Mr L Payne & Mrs J Terrell-Payne
Miss A Benson	Mr J & Mrs J Camens	Mr A Daou	Mr E Felkl	Mrs M Greenwood	Mr M Hooper	Miss J Laird	Mr S MacGregor	Mr D Mittiga	Mr R Pendlebury
Mr A & Mrs S Bhattacharjee	Dr I Camens	Mr W & Ms T Darling	Mr L Felkl	Miss T Griff	Mr T Hooper	Mr S Lambert	Mr H & Mrs F MacLachlan	Mrs R Mittiga	Mr J Pentelow
Mr A Bhattacharjee	Mr P Camens & Dr A Padbury	Mrs C Deans	Mr R & Mrs N Felkl	Mrs S & Mr C Grundy	Mr M Hubmayer	Mr C Landau	Miss A Maeder	Miss M Moore	Mr J Perkins
Mr F Bhattacharjee	Ms L Camens	Mr C Delbridge	Mr E Feng	Mr L & Mrs C Guerin	Mr T & Mrs G Hughes	Mrs F Lane	Mr S Maeder	Mr C Morgan	Mr W & Mrs S Peterson
Miss T Bhattacharjee	Mr J Cameron	Mr D Bilsborough & Mrs F Delbridge	Dr C Turnbull & Ms N Footer	Miss C Gunn	Miss C Ifould	Mr M Lane	Miss S Magann	Mrs A Morrison	Mr W & Mrs S Pettit
Mr D Bilsborough	Mrs L Campbell	Ms M Dimos	Mr D & Mrs C Ford	The Hon G & Mrs J Gunn	Mr S Ifould	Mr N Larsen	Mr B Marshall	Mr C Mumford	Mr C Phelps
Mr M Birchby	Rev M Campbell	Ms D Dimos Tricarico	Miss A Fotheringham	Ms S Gunson	Mr L Ivens	Mr S Larsen	Mr A Martin	Mr S Nairn	Mr B Phillips
Miss A Blacketer	Campion Education	Mrs J Dixon	Mrs K Fotheringham	Mrs G Haarsma	Mr I Jamieson	Dr R Laver	Mr O Martin	Mr P & Mrs A Naish	Miss I Phillips



# 2017 Honour Roll (continued)

## Building Fund Donations

Mr B Phipps	Mr P Routley	Mrs J Stratfold	Mrs J Wells
Mr P & Mrs M Pike	Ms K Rowbottom	Mr C Tan	Mr H White
Mr A Pink	Mr C Rowe	Miss A Thompson	Miss L White
Mr C Pointon	Mr G Rugless	Mr C & Mrs A Thompson	Mr S White
Mrs J Pointon	Mr C Ryan	Mr S Thomson	Mrs N Wightman
Mr A Burt & Ms J Pope	Miss E Ryan	Mr J Tilbrook	Mr B Williams
Mr R & Mrs K Porter	Mr J Ryan	Mr J Tomljenovic	Miss E Williams
Ms J Powell	Mrs R Ryan	Mr P Traino	Ms D Williams
Mr D Prentice	Mr B Sawley	Mrs J Treloar	Miss L Williams
Mr N Prentice	Mrs R Sawley	Mr J Treloar	Miss M Williams
Mrs D Prosser	Mr J & Mrs M Scales	Mr A Tremain	Ms C Willsmore
Mr P Pruttimuttakul	Miss A Scott	Mrs D Trumble	Mr R Willson
Miss A Pulford	Mr J & Mrs S Scott	Mt P Trumble	Miss G Wilson
Mrs M Quin	Miss M Seeley	Mrs J Tuck	Mr K Wilson & Ms S Tirrell
Ms C Quinn	Mr J & Mrs G Seppelt	Mr K Tuck	Ms M Wilson
Mr J Radbone	Miss H Shand	Mr P & Mrs H Tulla	Miss M Wilson
Mr T Rainbird	Mr Y Shao	RF & S Tuohy	Ms R Winser
Ms K Ramsay & Mr S Bruschi	Mr M & Mrs R Shearer	Mr P & Mrs K Turale	Mr J & Mrs M Wood
Mr M Ranger & Ms R Sporn OAM	Dr B Simpson	Mr S Turich	Mr L Wood
Mr S Read	Mr I Simpson	Mr J Turner	Dr D Worthley
Mrs R Reichstein	Mr D Sinclair	Mr R & Mrs B Turner	Mr C Wundersitz
Mr R & Mrs M Reid	Mr S Sluggett	Ms E Twelftree	Mr M Wynter
Mr J Arsenikakis & Ms R Reid	Mr R & Mrs Y Smart	Mr D Uhrig	Mr M Xie
Mr S Rickards	Mr C & Mrs T Smith	Mrs L Uhrig	Mr X Zhang & Ms Y Xu
Miss S Richards	Mr C Smith	Mr N & Mrs L Vadasz	Mrs B Yates
Mr L Ridgway	Mrs B Smoker	Ms L Vanderland	Mr A Yelegin
Mr B Roberts	Mr I Southwood	Miss S Visvardis	Miss J Yelegin
Dr D & Mrs C Roberts	Mr Q Spencer	Miss E Vrodos	Dr O & Mrs A Yelegin
Mr N Roberts	Mr R and Mrs T Spencer	Dr N Vrodos	Miss Z Yelegin
Mr T & Mrs S Roberts	Mr M Spurling	Mr S Wade	Ms S Young
Mr J Robinson	Miss P Spurrier	Mr J Walker	Mrs J Yuile & Mr I Little
Dr S Robinson	Mr R and Dr C Stevens	Mr P Wawrzycki & Ms K Walker	Mr T Zhang
Mr M Rodenburg	Miss H Stewardson	Dr A Wallace	Miss H Zschech
Mr A Rosser	Miss R Stobart	Miss B Watson	
Miss E Ross-Smith	Mr M Stone	Dr J Webb-Williams	

*Every effort has been made to ensure the accuracy of these lists. If you feel an error has been made, please immediately notify the Philanthropy Office on +61 8 8274 4335 or cnewton@scotch.sa.edu.au.*

# Your Leadership Teams 2017

## Council of Governors

**Chairperson:** Raymond Spencer

**Principal:** Dr John Newton

Fairlie Delbridge ('84)

Emma Ewer ('83)

Andrew Freeman ('80)

Peter Tulla ('83)

Keith Maynard

Philip Paterson

Rosemary Winser

## Advancement Committee

**Chairperson:** Emma Ewer ('83)

Abhra Bhattacharjee (Director of Philanthropy)

Tania Darling (Director of Early Years)

Natalie Felkl (Head of Community & Marketing)

Ieva Hampson (Head of Mitcham Campus)

Jacqui Harbison

Mr Andrew Freeman ('80)

Shawn Kasbergen (Director of Student Wellbeing)

Monique Littlejohn

Dr John Newton (Principal)

Todd Roberts ('88)

Samantha Young

## Senior Leadership Team

**Principal:** Dr John Newton

Dale Bennett (Deputy Principal, Head of TPC)

Abhra Bhattacharjee (Director of Philanthropy)

Tania Darling (Director of Early Years)

Morag Greenwood (Director of HR)

Ieva Hampson (Head of Mitcham Campus)

Teresa Hanel (Deputy Principal, Director of T&L)

Shawn Kasbergen (Director of Student Wellbeing)

Rob Lee (Director of Information and Innovation)

Kelly Sharp (Head of Middle School, Assistant Head of TPC)

Richard Stone (Chief Operating Officer)

## Philanthropy Team

**Director of Philanthropy:** Abhra Bhattacharjee

Ana Gozalo (Philanthropy Specialist)

John Kramer (Philantropy and Major Gifts)

Catherine Newton (Philanthropy Assistant)

Dr John Newton (Principal)

Ken Webb (Philantropy and Major Gifts)

## Foundation Board

**Chairperson:** Sue Chase ('76)

**Executive Officer:** Abhra Bhattacharjee

Dr John Newton (Principal)

Mr Phillip Camens ('76)

Mr David Cosh

Ms Emma Ewer ('83)

Mrs Nicole Footer ('88)

Mr Andrew Freeman ('80)

Mr Peter Harvey ('91)

Dr Chien-Li Holmes-Liew ('93)

Mr Andrew Just ('62)

Mr John Kramer

Ms Alex Nunn

Mr Raymond Spencer

Mr Ken Webb

Mr John Wood ('65)

## Community Relations Team

**Head of Community & Marketing:** Natalie Felkl

Alli Evans (Marketing & Events Co-ordinator)

Tria Goode (Old Collegian Events Co-ordinator)

Warren King (Marketing & Communications Co-ordinator)

Jenny Stratfold (Events & Community Relations Co-ordinator)

David Saies ('49) (Volunteer)



**Scotch College Adelaide**

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**[www.scotch.sa.edu.au](http://www.scotch.sa.edu.au)**

# SAUK VALLEY COLLEGE FOUNDATION

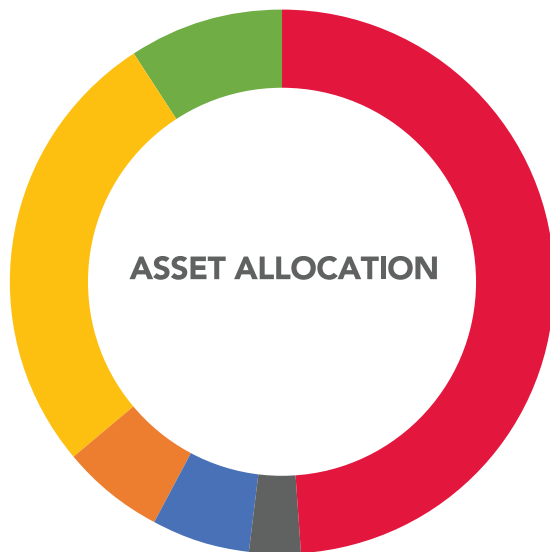
## *2018 Endowment Report*

The Sauk Valley College Foundation is a 501(c)3 not for profit that was formed in 1965 for the sole purpose of providing support to Sauk Valley Community College, its programs, and its students. The Foundation is comprised of a 16-member volunteer board who live in various towns throughout the district. These volunteer board members assist with developing relationships and capital that support the initiatives of the college and provide scholarships and other forms of support to the students of SVCC.

### Endowment Overview

The Foundation currently has over 57 endowed funds that donors have generously established for particular purposes such as scholarships, program support and capital improvements. To effectively manage these funds, the Foundation combines the assets into an endowment pool with each endowment fund owning shares in the pool.

The Foundation strives to meet two goals when managing the endowment pool. First, we strive to provide a stable source of perpetual financial support for our students and the College. Second, we seek to preserve the real purchasing power of the principal by diversifying the investment portfolio across a variety of asset classes. Our objective when managing the endowment pool is to achieve each of these goals over a long-term horizon.



■ U.S Equity	49%	■ International Equity	6%
■ Emerging Markets Equity	3%	■ Core Bonds	27%
■ Opportunistic Bonds	6%	■ Diversifying Strategies	9%



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## Foundation Year in Review

The Sauk Valley College Foundation is dedicated to securing and stewarding the resources that support the growth of the College. The funds raised in fiscal year 2018 were used to support a variety of awards, projects, and activities that benefitted the students and the College.

- On February 16, 2018, the Foundation presented Sauk's inaugural signature event, ***The Chocolate Rendezvous***. With 425 tickets sold, participants from across the region enjoyed an elegant evening at the College, sampling scrumptious chocolate desserts and mouthwatering hors d'oeuvres. Our energetic Foundation Board and volunteers made this vision come to life, securing a total of \$15,000 for the SVCC Agriculture program through ticket sales and sponsorships.
- At the May 2018 commencement ceremonies, Kathryn 'Kit' Lillyman, retired professor of foreign language, was conferred an Honorary Associate in Arts degree 'in recognition of her exceptional distinction of service to her family, profession and community.' In 2017, she bestowed a \$25,000 endowment to Sauk to assist transfer-seeking students pursuing majors in foreign languages. Before her passing in July of 2018, Kit was devoted to helping others, and her endowed gift will help support future generations of Sauk students.
- The SVCC Alumni Association named Frank Selmi '73 as the 2018 Outstanding Alumni recipient. He earned an Associate of Science degree in Agriculture before transferring to the University of Illinois, Urbana-Champaign where he earned his Bachelor of Science degree in Horticulture. About his time at Sauk, Frank reflected, "I look fondly upon my days at Sauk. This institution provided a solid foundation for me to take the next step."
- On May 11, 2018, the 50th anniversary of the Health Professions Pinning Ceremony was held. The Foundation assisted Board of Trustee, Dennis Fulrath, in locating and bringing together members of the class of 1968-69, and one of the original program professors, Dr. Joan Lesage. These alumni were recognized for 'setting the standard for the many others that followed.'



# Sauk's Chocolate Rendezvous

## Foundation Year in Review (cont.)

- With contributions from local manufacturing companies and private donors, the Sauk Valley Manufacturing Initiative Project was established to provide ongoing monetary support for infrastructure, equipment, and programming that furthers the development of Whiteside Area Career Center (WACC) and SVCC students. Funds from this project purchased two Haas vertical mills, two spindle lathes and six new CNC simulators to be used by students in the multi-craft technology program.

In summary, the Foundation awarded \$288,000 in scholarships and over \$6,500 to support student clubs and projects in fiscal year 2018. In addition, the Foundation purchased over \$145,000 in equipment and software to support the College and its programs. The Foundation continues to grow SVCC's resources with 1.2M raised in FY 2018, a 20% increase from FY 2017.

## Moving Forward in 2019 –

Our greatest priority is to grow our funds to provide support to the students and programs of the College. In 2019, our efforts to achieve this goal include:

- Provide approximately \$300,000 in scholarships for the 2018-19 academic year to qualified candidates.
- Hold the second annual *Chocolate Rendezvous* on February 16, 2019 to raise funds for the Agriculture program. Sponsorship solicitation is currently ongoing and ticket sales will begin December 1, 2018.
- Work with current and potential donors to receive, manage, and distribute funds to ensure gifts are used for the purposes for which they were given.
- Continue to grow partnerships with organizations and businesses within the district to develop new projects that provide scholarship and program assistance to current and future students.
- Continue to be a presence in the community through membership in local chambers and organizations, and participation in local events.





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## Major Gift Campaign – The Sauk

**Promise:** *A beacon of hope and an engine for growth*

In October 2018, the Foundation approved a private major gifts fundraising campaign to create a permanent endowment that will encourage every graduating high school senior to pursue higher education at Sauk Valley Community College. The Sauk Promise will provide every degree-seeking student within Sauk's district tuition up to three years upon completion of high school and Promise Program requirements. The Sauk Promise will benefit area residents, businesses and the College, thereby serving as a catalyst to create a strong future for our region. To succeed, it will require the broad participation of many generous individuals and community groups. Working together, we can realize the promise of a better future for all—creating a beacon of hope and an engine for growth.

## Thank You

We are grateful for the generosity of the many donors, like you, who believe that the Sauk Valley College Foundation is worthy of their investment. Every gift contributes to the people, programs, and places at Sauk.

On behalf of the Sauk Valley College Foundation Board of Directors, thank you for your continued support of Sauk Valley Community College.

For questions about this report or more information about charitable contributions and other giving opportunities, please contact Lori Cortez, Dean of Institutional Advancement, at 815.835.6260 or by email at [lori.a.cortez@svcc.edu](mailto:lori.a.cortez@svcc.edu).

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### Sauk Valley College Foundation Board

Robert Sondgeroth, President  
Penny Thomas, Vice President  
Brenda Reynolds, Secretary  
Rebekah Emery, Treasurer  
David Abele  
Jerry Binder  
Ronald Coplan  
Nancy Cruse  
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Tom Jensen  
Marcia Jones  
Nick Krumbholz  
Joan Padilla  
Lisa Steinke  
John Thompson  
William Wescott  
Margaret Tyne, College Board Liaison

### Sauk Valley Community College Staff

Dr. David Hellmich, President  
Dr. Lori Cortez,  
Dean of Institutional Advancement  
Angie Delhotal, Administrative Assistant  
Nancy Breed, Foundation Assistant  
Chris Pilling, Manager of Campaign Operations  
and Alumni Engagement



**Sauk Valley College Foundation**

▪ Sauk Alumni Association ▪