



2018

STEWARDSHIP REPORT



2018 REPORT FROM THE PRESIDENT/CEO



COLORADO STATE UNIVERSITY-PUEBLO

OUR STUDENTS OUR COMMUNITY OUR REGION

SCHOLARSHIPS

900

AWARDED

Dear ThunderWolves and generous partners,

On behalf of the students, faculty and staff of Colorado State University-Pueblo and the CSU-Pueblo Foundation, we wish to thank all of our generous donors and volunteers for their investment and leadership throughout Fiscal Year (FY) 2018.

During FY2018, which ended June 30, more than 2,000 alumni, friends and corporate partners contributed over \$2.4 million dollars in private fundraising activity through 5,500 gifts to support student scholarships and service initiatives at CSU-Pueblo's campus. From providing more than \$2.5 million through 900 scholarships to CSU-Pueblo students, to funding 23 cross-campus initiatives during our third annual

#LoveCSUPueblo Give Day, private support is fueling the learning, discovery and innovation that benefits our students, our community and our region; fulfilling our vision to provide sustainable financial support to CSU-Pueblo.

Annual scholarship funding by the CSU-Pueblo Foundation has nearly doubled from \$1.5 million in 2012 to \$2.5 million in 2018! We are pleased to report that over the last seven years, for every dollar earned, 77 cents went to programs, scholarships and services.

As we honor the accomplishments of the last fiscal year, we also boldly look forward to an ambitious road ahead in which private support for our students and our campus programs and facilities will be more critical than ever before. CSU-Pueblo is on course to be the people's university of the Southwest by 2028. This ambitious Vision will be successful, but the degree to which we succeed will depend in large part on the collective generosity of our partners.

To each of you who chose to invest in Colorado State University-Pueblo during the last fiscal year—and will in the years ahead—thank you for your unwavering support and advocacy to advance the mission of the University and the CSU-Pueblo Foundation.

Go pack!

Todd Kelly, President/CEO
CSU-Pueblo Foundation

Barbara Vidmar, Chair
CSU-Pueblo Foundation Board of Trustees

The CSU-Pueblo Foundation provides opportunity, promotes equity and promises excellence to Colorado State University-Pueblo students.

OUR VISION

The CSU-Pueblo Foundation will provide sustainable financial support to CSU-Pueblo.

OUR MISSION

The CSU-Pueblo Foundation will advance CSU-Pueblo's mission through philanthropic efforts.

OUR CORE VALUES

We will conduct our business with the strictest adherence to the following core values:

- Accountability
- Donor Focus
- Integrity
- Transparency

These core values, when lived out, will inspire the confidence of our key stakeholders, create the most productive and rewarding work environment, and best position the Foundation in fulfilling its vision.

UNDERSTANDING YOUR STEWARDSHIP REPORT

- Your balance as of July 1, 2018 is highlighted and labeled as "Ending Balance."
- The lines titled "Contributions" and/or "Allocated Income" are revenue to the account.
- Displayed expenses to the account will list scholarships awarded and administration fees.
- The balance of your account does not reflect scholarships for the current academic year.





President Medallion winners Parkview Medical Center (Mike Baxter), Roni Ashford-Rivera and Joe Folda with Dr. Timothy Mottet.



CSU-Pueblo President's Club members enjoy the 2018 President's Club Soirée.



CSU-Pueblo scholarship recipients thank their generous benefactors at the 2018 Friends & Scholars Luncheon.

AVERAGE STUDENT COST

2018/2019 Annual Tuition & Fees	\$10,408*
2018/2019 Average Book Cost	\$2,000*
2018/2019 Room & Board	\$10,020**

* Based on 15 credit hours, in-state tuition

** Standard shared occupancy room and meal plan

COLORADO STATE UNIVERSITY-PUEBLO FOUNDATION FACTS

Cost to Raise \$1 (7 year average)	\$.23
Scholarships Awarded Fall 2018	900
Percentage of expenditures used to support students and University programs	79.3%



PURPLE HEART DESIGNATION

Many of America's combat wounded heroes return home from war and re-enter society through the classroom. By instituting a full-range of veteran-oriented services, including training faculty members on supporting combat wounded veterans in the classroom, CSU-Pueblo distinguished itself as a gold standard university in the veteran's community.

The Purple Heart is the nation's oldest military award. Introduced as the "Badge of Military Merit" by General George Washington in 1782 and is awarded to members of the U.S. armed forces who are wounded by an instrument of war in the hands of the enemy and posthumously to the next of kin.

In April 2018, CSU-Pueblo was designated and formally recognized as the first Purple Heart University in Colorado by the Military Order of the Purple Heart. CSU-Pueblo proclaims itself as a Purple Heart University that appreciates the sacrifices of its Purple Heart recipients and pledges to honor and support them.

HISPANIC SERVING INSTITUTION

Hispanic-Serving Institutions are defined as colleges, universities, or systems/districts where total Hispanic enrollment constitutes a minimum of 25% of the total enrollment. CSU-Pueblo self-reported Hispanic population is 31.5% of "Total Enrollment" and includes full-time and part-time students at the undergraduate or graduate level.

As a Hispanic Serving Institution CSU-Pueblo produces an environment to develop positive, challenging, inclusive leaders who have a global understanding of multiculturalism and who are accountable to our society as a whole.

KYLEIGH BLOYD Senior, Mathematics

El Pomar President's Leadership Program Scholarship

"Learning is something that I love because it allows for personal growth and understanding. Scholarships have allowed me more peace of mind when figuring out my finances for the school year, and it offers me the chance to focus on my academics more closely. In the future, I hope to give back to students pursuing college degrees just like you have supported me."



BRANDON BAYER Senior, Bio-Medicine

Kane Family Foundation Scholarship

"It is because of this foundation that I am able to attend college and pursue the dreams that I have had ever since I was a child. This scholarship allows me to devote the amount of time to my studies required to excel. At the end of this year I will begin hearing from medical schools regarding the applications that I sent out. I feel honored to be a part of the legacy that Wanden and Andy Kane left behind."



CSU-PUEBLO FOUNDATION
Statement of Financial Position
July 1, 2017 to June 30, 2018

BALANCE SHEET

ASSETS

Cash and cash equivalents	\$1,712,682
Accounts receivable	27,956
Unconditional promises to give, net	366,994
Marketable securities	38,186,925
Prepaid expenses	32,349
Miscellaneous assets	602
Beneficial interest in remainder trusts	246,406
Investment in limited partnership	249,948
Commercial real estate projects	2,328,940
Leasehold improvements and office equipment	103,554
Less accumulated depreciation	(86,735)

TOTAL ASSETS \$43,169,621

LIABILITIES AND NET ASSETS

LIABILITIES

Accounts payable	\$2,878,841
Other liabilities	42,919
Line of credit payable	2,395,338

TOTAL LIABILITIES \$5,317,098

NET ASSETS

Unrestricted net assets	2,932,733
Temporarily restricted	16,741,498
Permanently restricted	18,178,292

TOTAL NET ASSETS \$37,852,523

TOTAL LIABILITIES AND NET ASSETS \$43,169,621

REVENUE AND SUPPORT

Contributions	\$2,149,310
In-kind contributions	36,546
Fundraising revenue	280,909
Dividends	1,931,839
Interest	4,203
Realized gain on sale of marketable securities	42,862
Unrealized gain on marketable securities	1,486,886
Miscellaneous revenue (loss)	(14,214)
Changes in the value of split-interest agreements	(1,876)

TOTAL REVENUE AND SUPPORT \$5,916,465

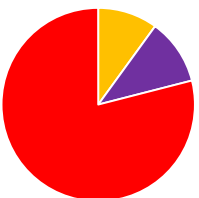
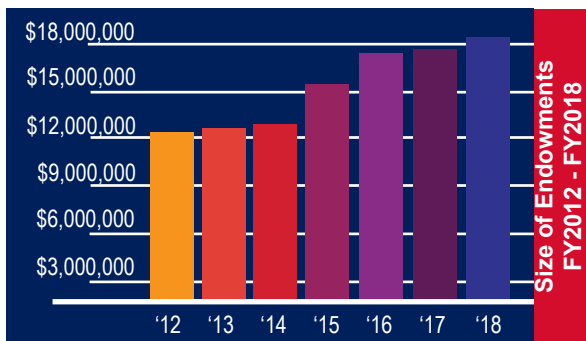
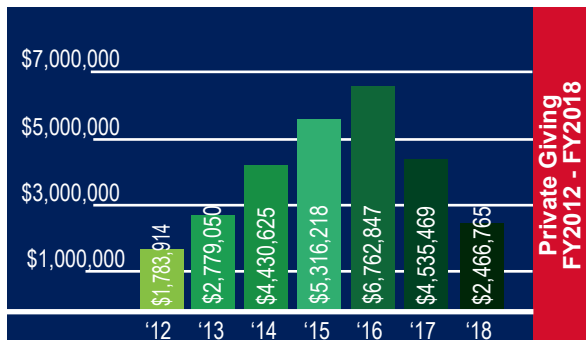
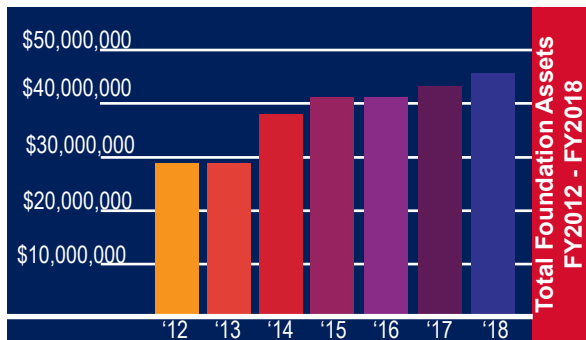
EXPENSES

Program expenses	\$3,857,339
Management and general	525,554
Fundraising	477,481

TOTAL EXPENSES \$4,860,374



- 8% Unrestricted
- 44% Current Funds (Temporarily Restricted by Donor)
- 48% Endowment (Permanently Restricted by Donor)



- 10% Fundraising Expenses
- 11% Administrative Expenses
- 79% Program Expenses & Student Scholarships

The Better Business Bureau's Standards for Charity Accountability recommends that non-profits spend at least 65 percent of their total expenses on program activities.

OUR LEADERSHIP TEAM

TRUSTEES

- | | |
|-------------------------------|------------------|
| Barbara Vidmar
Chairperson | Louis Nazario |
| Chris Turner
Vice-Chairman | Michael Occhiato |
| Brandon Bayer | Ruben Pena |
| Kirk Brynjulson | Brett Holland |
| John Budd | Alex Romero |
| Adam Carroll | Jackie Seybold |
| Eric Carson | Margarita Saenz |
| Russell DeSalvo | Darrin Smith |
| Brandice Eslinger | Marvin Stein |
| Angela Giron | Steven Titus |
| Jessica Gottlieb | Andrew Trainor |
| Chad Heberly | Dee Weber |
| | David Williams |
| | Ralph Williams |

SUSTAINING TRUSTEES

- | | |
|------------------|------------------|
| Walt Basset, Jr. | Robert Leach |
| Dave Feamster | Gerry Montgomery |
| Rita Gersick | John Oeschle |
| Art Gonzales | Jane Rawlings |
| Greg Hahn | Timothy Simmons |
| Joyce Lawrence | Jim Wallace |

FOUNDATION STAFF

- Todd Kelly
President/CEO
- Valerie Gallegos
Director of Budget & Finance
- Antonio Huerta
Donor Relations Manager
- Sandy Lundahl
Scholarship Manager
- Sammi Mutz
Research & Stewardship Manager
- Susie Pagnotta
Director of Data Analysis & Gift Processing
- Nick Potter
Chief Operations Officer
- Amber Shipley
Communications & Events Manager