

STEWARDSHIP REPORT

2019



Colorado
State
University
PUEBLO
FOUNDATION

2019 REPORT FROM THE PRESIDENT/CEO



**COLORADO STATE
UNIVERSITY PUEBLO**

Colorado State University-Pueblo's students, faculty, and staff thank you, our generous supporters, for your investment and leadership in Fiscal Year (FY) 2019. This 2019 Stewardship Report provides a snapshot of your philanthropy in service to Colorado State University-Pueblo education and your generosity in action. Your commitment to transformation through education propels our community and every community we touch to grow—economically and culturally—and ensures CSU-Pueblo's vision of becoming the people's university of the Southwest United States by making a four-year education accessible, affordable, and achievable.

**DEVOTED
2,000
DONORS**

**DOLLARS
\$4.6M
RAISED**

Throughout FY2019, which ended June 30, more than 2,000 alumni, friends, and corporate partners contributed over \$4.6 million dollars in private fundraising activities through 5,500 gifts to support student scholarships and service initiatives at CSU-Pueblo's campus. From providing more than \$2.7 million through 900 scholarships to CSU-Pueblo students, to funding 26 cross-campus initiatives during our fourth annual #LoveCSUPueblo Give Day, private contributions continue to provide sustainable financial support to CSU-Pueblo.

This work has only been made possible by truly dedicated and talented Trustees, staff, and devoted benefactors of CSU-Pueblo, CSU-Pueblo

Foundation, and our students. We are so excited about the work we are doing, the impact it has on CSU-Pueblo students, and the future of 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

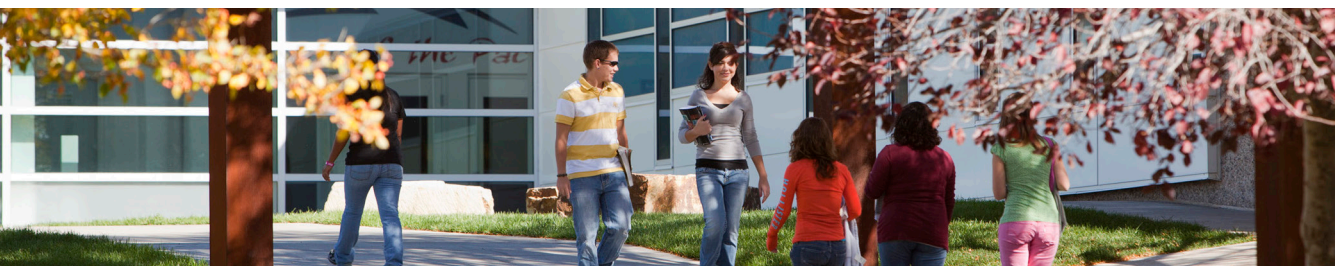
We will conduct our business with the strictest adherence to the following core values:

- **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, 2019 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.





2019 President's Medallion recipients Mark DeRose, A84, with wife, Lynette, and Mrs. Bernadette "Berni" and Dr. Adolph "Rudy", A59, Padula.

Donors and CSU-Pueblo Foundation board members enjoy the 2019 President's Club Soirée with Dr. Timothy Mottet and Rick Gonzalez.

CSU-Pueblo scholarship recipients thank their generous benefactors at the 2019 Friends & Scholars Luncheon.

VISION 2028

Colorado State University-Pueblo is reimagining higher education across the Southwest United States, in our region, for our community, and on our Pueblo campus.

The University's vision is to establish CSU-Pueblo as the people's university of the Southwest United States by 2028.

A university for the people must be inclusive, accessible, and affordable, and CSU-Pueblo remains steadfast in its determination to offer any interested student the opportunity to earn a university degree.

TODOS SANTOS

The Colorado State University Todos Santos Center is an international extension of the CSU System. The Center is an opportunity for CSU-Pueblo students to grow as global citizens in their understanding of and appreciation for other cultures.

"The CSU Todos Santos Center is a completely unique approach designed to facilitate engagement and exchange among CSU students, faculty, and researchers, and the local community of Todos Santos." said Amy Parsons, executive vice chancellor for the CSU System.

CSU-Pueblo offers a 3 credit hour general education study abroad program at Todos Santos and has worked to make it as affordable as possible.

"The entire trip was incredible. It gave me an opportunity to not only better understand how others live, but to be fully immersed in such a rich culture. It made me feel more connected to my roots and the world. I now feel more well-rounded in my studies from the time I spent there."

- Ryley Henniger, 2019 participant



AVERAGE STUDENT COST

2019/2020 Annual Tuition & Fees	\$10,445*
2019/2020 Average Book Cost	\$2,000*
2019/2020 Room & Board	\$10,610**

* Based on 15 credit hours, in-state tuition

** Standard shared occupancy room and unlimited meal plan

COLORADO STATE UNIVERSITY-PUEBLO FOUNDATION FACTS

Cost to Raise \$1 (7 year average)	\$.23
Scholarships Awarded Fall 2019	900
Percentage of expenditures used to support students and University programs	79.68%

Connor Foust

Junior, Engineering & Mathematics

Jennie and Albert Gersick Foundation Scholarship

"This scholarship means that I won't have to work as much to help pay for my expenses, allowing me more time for studies. I am part of the Sangre de Cristo Arts Center dance company and have done several shows with them including their annual production of The Nutcracker. I will be able to continue to perform, in part, due to your generous donation."



Mia Gilbertson

Sophomore, Mass Communications

Kane Family Foundation Scholarship

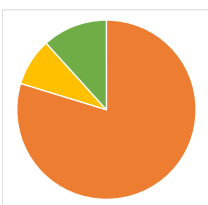
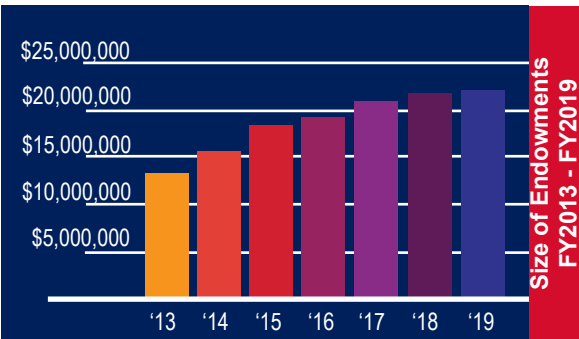
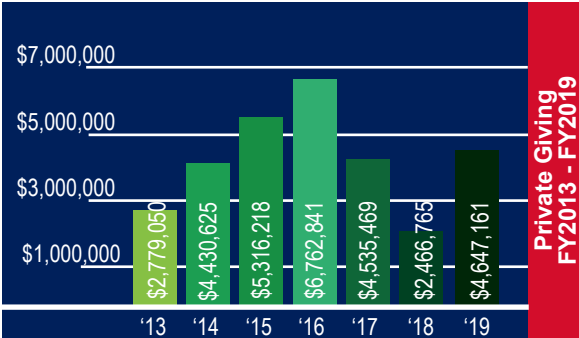
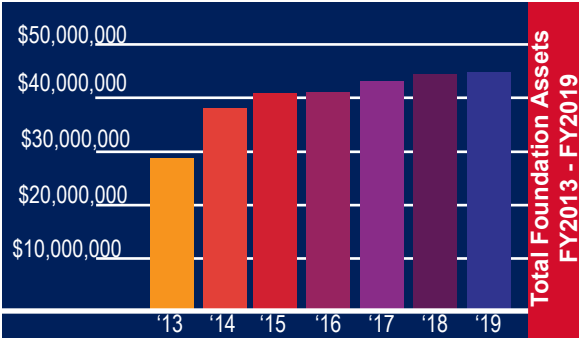
"My college experience was transformed by the Kane Family Foundation Scholarship, providing financial security, autonomy, and a great deal of pride. The scholarship enabled me to become a member of the President's Leadership Program which led to participating in the Associated Students' Government and stepping-up to manage the University's Pack Pantry to assist those struggling with food insecurity."





NET ASSETS

- 9% Unrestricted
- 91% Restricted by Donor



- 8% Administrative Expenses
- 12% Fundraising Expenses
- 80% Program Expenses & Student Scholarships

SU-PUEBLO FOUNDATION
 Bonforte Blvd. Pueblo, CO 81001
 719.549.2380

CSU-PUEBLO FOUNDATION Statement of Financial Position July 1, 2018 to June 30, 2019

BALANCE SHEET

ASSETS

Cash and cash equivalents	\$1,050,488
Accounts receivable	13,311
Unconditional promises to give, net	1,242,623
Marketable securities	38,348,277
Prepaid expenses	32,349
Miscellaneous assets	602
Beneficial interest in remainder trusts	246,385
Investment in limited partnership	249,948
Commercial real estate projects	2,376,940
Leasehold improvements and office equipment	34,357
Less accumulated depreciation	(21,529)

TOTAL ASSETS \$43,573,751

LIABILITIES AND NET ASSETS

LIABILITIES

Accounts payable	\$2,349,315
Other liabilities	38,168
Line of credit payable	1,146,551

TOTAL LIABILITIES \$3,534,034

NET ASSETS

Unrestricted net assets	\$3,519,902
Donor restricted net assets	36,519,815

TOTAL NET ASSETS \$40,039,717

TOTAL LIABILITIES AND NET ASSETS \$43,573,751

REVENUE AND SUPPORT

Contributions	\$4,109,165
In-kind contributions	253,813
Fundraising revenue	284,183
Dividends	2,358,014
Interest	5,793
Realized gain on sale of marketable securities	27,334
Unrealized gain on marketable securities	541,667
Miscellaneous revenue (loss)	64,309
Changes in the value of split-interest agreements	(21)
SEC settlement fees	32,221
Miscellaneous revenue (loss)	(91,597)

TOTAL REVENUE AND SUPPORT \$7,584,881

EXPENSES

Program expenses	\$4,301,066
Administration and general	461,517
Fundraising	635,104

TOTAL EXPENSES \$5,397,687

OUR LEADERSHIP TEAM

TRUSTEES

- | | |
|-------------------------------|--------------------|
| Barbara Vidmar
Chairperson | Louis Nazario |
| Chad Heberly
Vice-Chairman | Timothy Mottet* |
| Kirk Brynjulson | Michael Occhiato |
| Eric Carson | Ruben Pena |
| Russell DeSalvo, III* | KC Savage |
| Brandice Eslinger | Jackie Seybold |
| Mia Gilbertson* | Darrin Smith |
| Angela Giron | Steven Titus |
| Jessica Gottlieb | Christopher Turner |
| Brett Holland* | Kathy Walker |
| Todd Kelly* | Dee Weber |
| Mark Magnone | David Williams |
| | Chris Wiseman |

*Ex-Officio

SUSTAINING TRUSTEES

- | | |
|------------------|-----------------|
| Walt Basset, Jr. | John Oeschle |
| Dave Feamster | Jane Rawlings |
| Dennis Flores | Timothy Simmons |
| Rita Gersick | Marvin Stein |
| Greg Hahn | Andrew Trainor |
| Joyce Lawrence | Jim Wallace |
| Robert Leach | Ralph Williams |
| Gerry Montgomery | |

FOUNDATION STAFF

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