

FALL

2022

NEWS FOR DONORS

# Foundation Insights



COLORADO STATE UNIVERSITY PUEBLO  
**Foundation**



# MISSION

The mission of the CSU Pueblo Foundation is to advance CSU Pueblo's mission through philanthropic efforts.

## CORE VALUES

- **Accountability**
- **Integrity**
- **Donor Focus**
- **Transparency**

## LEADERSHIP TEAM

### TRUSTEES

Chad Heberly Chair	Joleen Marrufo*
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Mitch Brown	Timothy Mottet*
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Brandice Eslinger	Jackie Seybold
Dominic Gallina	Matt Smith
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Jessica Gottlieb	Barbara Vidmar
Scott Hinkle	David Williams
Todd Kelly*	Ralph Williams
Mikayla Lerch*	Chris Wiseman

\*Ex-Officio

### SUSTAINING TRUSTEES

Dave Feamster	John Oeschle
Rita Gersick	Jane Rawlings
Greg Hahn	Timothy Simmons
Robert Leach	Marvin Stein
Gerry Montgomery	Andrew Trainor

### STAFF

Todd Kelly President/CEO
Valerie Gallegos Director of Budget & Finance
Sandy Lundahl Director of Foundation Scholarships
Daniel Minich Digital Donor Engagement Coordinator
Sarah Mize Operations Coordinator
Sammi Mutz Assistant Director of Gift Processing & Stewardship
Susie Pagnotta Director of Data Analysis & Gift Processing
Amber Shipley Director of Communications, Events & Annual Giving

#### CSU PUEBLO FOUNDATION

2200 Bonforte Blvd. • Pueblo, CO 81001  
719.549.2380 • www.csupueblofoundation.com



It is once again that time of year when we release our annual report, that I reflect on the gratitude and appreciation I hold for our partners.

Because of your generosity, the CSU Pueblo Foundation was able to award 920 scholarships (spring and Fall 2022) totaling nearly \$3.5 million and ensure CSU Pueblo had support for programming, departments, and clubs across campus.

CSU Pueblo's small class sizes and strong student-professor relationships help us meet our students—more than 37% of whom are first-generation—where they are. Our students are the future leaders in their communities, and we are committed to ensuring their educational success.

This same generous spirit continues with CSU Pueblo's alumni and friends who are committed to the University's mission—*CSU Pueblo's success will be measured by the resilience, agility, and problem-solving abilities of our diverse student population and the ways in which our graduates are able to navigate work in a rapidly changing world.* This is evident with the continued support of *OverDrive*, a Campaign for CSU Pueblo (see the back panel for more information). We are truly grateful for your inspiring partnership.

We are pleased to share this Fiscal Year 2022 CSU Pueblo Foundation Annual Report. Included are Foundation activities and financial performance, as well as profiles about our donors and students, who demonstrate the ongoing impact of philanthropy on our mission.

Go Pack!

Todd Kelly, President/CEO  
CSU Pueblo Foundation



# TIMOTHY “TIM” SIMMONS

ALUMNUS  
TRUSTEE  
VOLUNTEER  
PHILANTHROPIST



Alumnus Timothy Heath “Tim” Simmons graduated from Southern Colorado State College, now CSU Pueblo, in 1969 with a bachelor’s degree in mass communications and a minor in business. He continued his post-graduate studies at the University of Iowa, where he earned a master’s degree in journalism with a minor in athletics administration.

Simmons went on to have an astounding career in sports public relations for collegiate, Olympic, and professional teams, including the Denver Nuggets. After serving in sports marketing for Coors Brewing Company, Simmons “retired” and established himself as an independent consultant in media information for sporting events traveling across Colorado, the United States, and the world.

As the son of legendary Southern Colorado State College basketball head coach, Harry “The Chief” Simmons, Tim grew up on the SCSC Orman Campus and identifies as a Pueblo boy, no matter where he lives. His love of CSU Pueblo and its athletic programs can directly be attributed to his dad and time spent with him on campus.

Simmons and his wife, Lynn, met thanks to a former player of the elder Simmons and have been married for 48 years. She understood the Simmons humor and wit and was a perfect match. Lynn spent 25 years working in elementary education and is now a consultant working with educational staff development.

Tim’s consulting and travel schedule is hectic at best, but he manages to give generously of his time to CSU Pueblo. He serves as the Athletics Hall of Fame Committee chair and Athletics historian. Recently, he introduced and now manages a regular email communique to friends and followers of the Pack - *The Howler Herald*. He also regularly hosts CSU Pueblo Basketball Alumni events in the Denver Metro area and serves as a Sustaining Trustee for the CSU Pueblo Foundation.

**“Donations are an emotional thing for most people - I look at how fortunate I’ve been and want to give back to help young people in their pursuit of an education.”**

In addition to giving his time to his alma mater, Simmons has given financially to establish the Richard Pavlic Scholarship in the 80s, The Harry H. and Mary Elizabeth “Bodie” Simmons Memorial Scholarship, and the Sam Batey Scholarship to give back to the players at CSU Pueblo. “Donations are an emotional thing for most people - I look at how fortunate I’ve been and want to give back to help young people in their pursuit of an education,” says Simmons.

## FOUNDATION EFFECTIVENESS

<b>Cost to Raise \$1</b>	\$ .08
<b>Scholarships Awarded</b>	920
<b>Percentage of expenditures used to support students, University programs &amp; ThunderBowl activities</b>	85.4%

## STUDENT COST

<b>2022/2023 Annual Tuition &amp; Fees</b>	\$10,913*
<b>2022/2023 Average Book Cost</b>	\$1,800*
<b>2022/2023 Room &amp; Board</b>	\$10,018**

\* Based on 15 credit hours, in-state tuition

\*\* Standard shared occupancy room and unlimited meal plan





# JILLIAN KELLY

**CSU PUEBLO SENIOR  
B.A. IN HEALTH SCIENCES: HEALTH COACHING**

**Recipient of the  
Jane C. Cotner and  
Pueblo Kiwanis Club Foundation Scholarships**

CSU Pueblo senior and student-athlete, Jillian Kelly, grew up in Pueblo attending Pueblo Centennial High School, playing sports throughout her youth, establishing herself as a standout in track, volleyball, basketball and soccer.

The daughter of CSU Pueblo Foundation President/CEO, Todd Kelly, Jillian grew up on campus attending sports camps and watching the ThunderWolves athletes play when her dad was working as the associate athletic director in the CSU Pueblo Athletics Department. She looked up to the CSU Pueblo athletes as role models and aspired to be a part of the Pack.

After originally signing to run track for the ThunderWolves, she was approached by Head Women's Lacrosse Coach

Monica Potter to bring her athletic prowess and

**“I love working with people, but also love athletics, so sports psychology just clicked for me.”**

leadership to that team, where she now has served as captain for the past two seasons. This experience has allowed her to learn more about herself as a person and athlete.

Women's Lacrosse season begins in March, but the team works year-round to ensure they are in top physical condition. In fact, Kelly's day begins at 4:45 a.m. when she gets up and heads to campus for strength conditioning and practice in southern Colorado's ever changing weather—minus 2 and snowing one day, 70 and



sunny the next. By the time she's sitting in her first class of the day at 9 a.m., she already has put in four hours of mental and physical effort with the team. Her classes run from 9 a.m. to 2 p.m. followed by an internship with the CSU Pueblo strength and conditioning coach from 3 to 5 p.m. Then it's time to hit the weights for an hour, study, spend time with family and get some much-needed rest.

Much like her athletic career, Kelly's academic was not linear either. Originally enrolling in education and Spanish classes to pursue teaching certification, Kelly found her passion and true calling in the newly added health science degree and health coaching emphasis. The program provides a medical background needed in

athletics along with the psychology needed to help athletes thrive.

Kelly's dream career as a sports psychologist working with elite and professional athletes to increase their athletic performance while managing the mental stress and strain placed upon them. "I love working with people, but also love athletics, so sports psychology just clicked for me," said Kelly.

Kelly plans on pursuing a master's degree in sports psychology to prepare her for her dream job. For now, she's hard at work finishing her bachelor's degree with the help of the Jane C. Cotner and Pueblo Kiwanis Club Foundation Scholarships.

"As a student-athlete, there are unique stressors — from the

grueling schedule, to the physical demands of practice, to performing well in the classroom," said Kelly. The gift of financial scholarships have taken the financial stress away allowing Kelly to focus on her course of study and performance on the field.

**"I feel that part of my life has come full-circle. As a CSU Pueblo athlete, I am now the role model for young, aspiring athletes."**

"I feel that part of my life has come full-circle. As a CSU Pueblo athlete, I am now the role model for young, aspiring athletes," said Kelly.







# KADEN WILSON

CSU PUEBLO SOPHOMORE  
B.A. IN ENGINEERING: MECHATRONICS

Recipient of the  
Dammann Family Endowed Scholarship in Engineering

CSU Pueblo sophomore Kaden Wilson is pursuing a bachelor's degree in engineering with an emphasis in mechatronics. Wilson said, "I chose CSU Pueblo because of recommendations from my high school STEM teachers."

**"I chose CSU Pueblo because of recommendations from my high school STEM teachers."**

An Aurora native, Wilson lives on campus in student housing. Moving away from home was jarring at first, but he quickly adapted and now enjoys campus life and the friends he has made.

He forces himself to rise early for his morning classes, so he's more than ready for a little rest and relaxation after dinner in the Student Center dining room.

Wilson attributes his experiences in the Boy Scouts

of America to shaping him into the person he is today and acquiring the soft skills to succeed in school and in work. His scouting experiences and educational success helped him obtain an internship this past summer at AES Group - a full service engineering and architecture firm based in Aurora.

His scouting and educational success helped him acquire an internship late this past summer at AES Group. This exciting opportunity has allowed him to work with the programs used in mechanical engineering and design components. Though he started late in the summer with this opportunity, AES Group asked him to come back in the summer of 2023 to continue his hands-on learning.

Wilson is happy to be learning what he can in class and at his internship and is hopeful that it will help him figure out his future career path.



SunWest Educational Credit Union leaders and Dr. Henry Roman enjoy the 2022 President's Club Soirée. Pictured l-r: Leslie Shepard, Henry Roman, Mike Shoaf and Janice Mehle



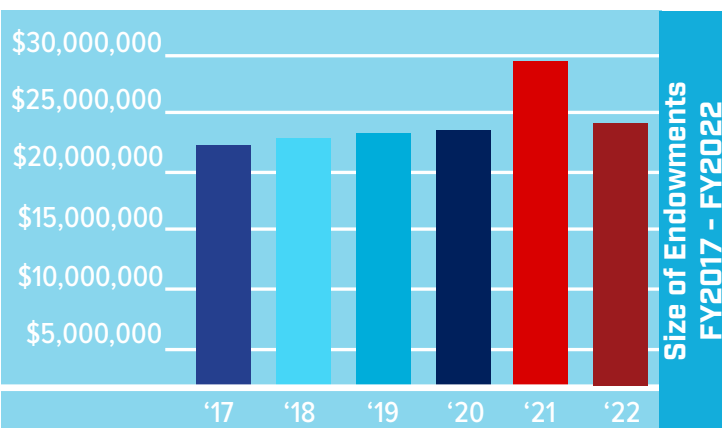
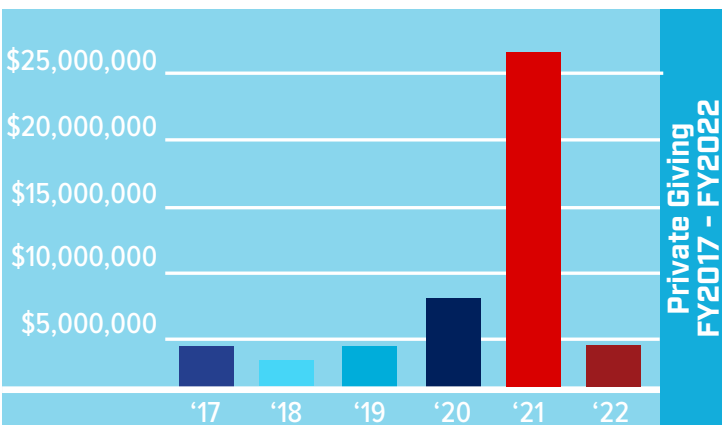
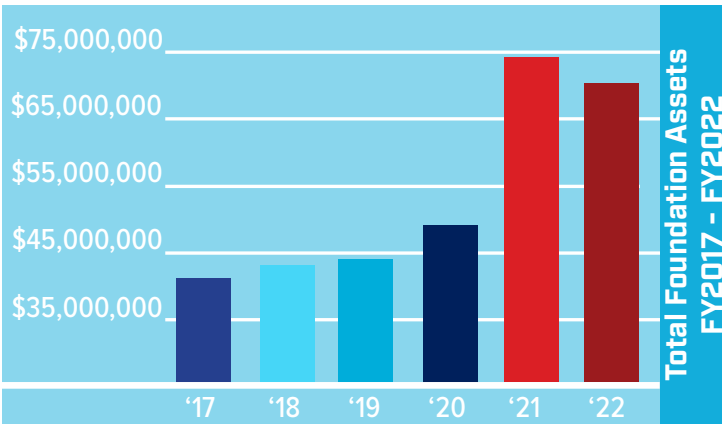
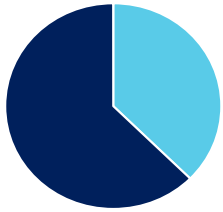
In May, more than 400 partygoers attended the President's Blue & Red Gala honoring the President's Distinguished Award recipients and featuring the music of Spinphony. Pictured l-r: Brad & Karen Farbo, Jan & Ralph Williams, and Reiko & Mark Clark.



Each year, the Foundation hosts the Friends & Scholars Luncheon, bringing together scholarship students and their generous benefactors. Pictured l-r: Gil Baca, Hayle Herrera - Vidal L. & Stella Raigoza Memorial Pre-Nursing Scholarship Recipient, and Victor Raigoza.

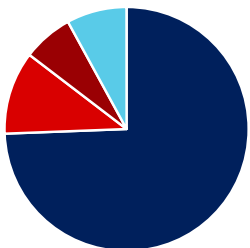
# NET ASSETS

- 37.4% Unrestricted
- 62.6% Restricted by Donor



- 8% Fundraising Expenses
- 6.6% Administrative Expenses
- 11% ThunderBowl Expenses
- 74.4% 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.



## CSU PUEBLO FOUNDATION Statement of Financial Position July 1, 2021 to June 30, 2022

### BALANCE SHEET

#### ASSETS

Cash and cash equivalents	\$1,041,601
Accounts receivable	9,950
Unconditional promises to give, net	2,062,653
Unconditional promises to give, in-kind	0
Marketable securities	41,195,740
Prepaid expenses	41,436
Miscellaneous assets	602
Beneficial interest in remainder trusts	229,753
Notes receivable	112,507
Investment in limited partnership	249,948
Commercial real estate projects	2,571,228
ThunderBowl Stadium	21,094,215
Leasehold improvements and office equipment	34,357
Less accumulated depreciation	(635,813)

**TOTAL ASSETS** \$68,008,177

#### LIABILITIES AND NET ASSETS

##### LIABILITIES

Accounts payable	\$3,049,761
Other liabilities	70,832
Notes payable	2,7213,962

**TOTAL LIABILITIES** \$5,834,555

##### NET ASSETS

Unrestricted net assets	\$23,257,072
Donor restricted net assets	38,916,550

**TOTAL NET ASSETS** \$62,173,622

**TOTAL LIABILITIES AND NET ASSETS** \$68,008,177

#### REVENUE AND SUPPORT

Contributions	\$4,029,527
In-kind contributions	85,817
Fundraising revenue	435,459
Net Investment Return	(6,913,132)
Dividends	-
Miscellaneous revenue	14,552
Changes in value assets held by others	(42,083)

**TOTAL REVENUE AND SUPPORT** \$(2,199,336)

#### EXPENSES

Program expenses	\$5,822,348
ThunderBowl expenses	860,794
Management and general	521,675
Fundraising	622,715

**TOTAL EXPENSES** \$7,827,532

  
**OVER  
DRIVE  
COLORADO STATE  
UNIVERSITY PUEBLO**

On January 1, 2019, the CSU Pueblo Foundation, in partnership with CSU Pueblo and the CSU System, privately launched *Drive, a Campaign for CSU Pueblo*. The campaign, with a goal to raise \$100 million by 2028, represents the internal desire CSU Pueblo students and staff embody to overcome obstacles and barriers to succeed.

**“The CSU Pueblo Foundation Board of Trustees has elected to expand our goal to \$135 million in support of access and affordability for students,” said CSU Pueblo Foundation Board Chair Chad Heberly.**

By the time Drive was publicly launched on March 15, 2022, the campaign had raised more than \$95 million. With six years remaining in the campaign, Foundation and University leaders decided to rebrand the campaign to *OverDrive*, and reset the goal to \$135 million.

CSU Pueblo Foundation’s commitment to an additional \$35 million will support access and affordability for CSU Pueblo students and prospective students. Each year, CSU Pueblo distributes nearly \$3.5 million in scholarships to CSU Pueblo students and supports other University financial aid programs like Colorado Promise and transfer initiatives. This additional funding over the next six years will enable the Foundation to assist the University with its objective to add 1,200 new students.

“The OverDrive campaign is an extraordinary platform for all members of the CSU Pueblo community to create life changing opportunities for future and current students,” said Todd Kelly, CSU Pueblo Foundation President/CEO. “This campaign allows us all to be a part of advancing a movement that provides greater access to higher education.”

Visit [drivecsupueblo.com](http://drivecsupueblo.com) for more information.

## IMPORTANT DATES

**MARCH 1**

Scholarship Application Deadline

**March 9**

Donor Appreciation Reception

**MAY 2**

Reisher Scholar Graduate BBQ

**MAY 4**

Kane Family Foundation Scholar Reception

**MAY 7**

Commencement

**MAY 20**

President’s Blue & Red Gala

**JULY 26**

Athletics Pride of the Pack Dinner

**AUGUST 22**

ThunderGals Luncheon

**OCTOBER 4**

Athletics Friends & Scholars Luncheon

**OCTOBER 18**

Friends & Scholars Luncheon

**NOVEMBER 1**

Reisher Scholar Dinner

**NOVEMBER 2**

#LoveCSUPueblo Give Day

