

STEWARDSHIP REPORT

2020



COLORADO STATE UNIVERSITY PUEBLO
Foundation

2020 REPORT FROM THE PRESIDENT/CEO & BOARD CHAIR

Donors and supporters—like you—continue to step-up to the plate to ensure Colorado State University Pueblo students have the tools and financial resources necessary to pursue their dream of a college education. In March, just a few days after the Foundation hosted the 2020 President’s Club Soirée, life changed. The COVID-19 outbreak hit the United States and our students, faculty and staff quickly adapted to online learning, remote work and self-isolation.




Immediately, student needs became apparent—computers, internet access and tuition payment shortfalls—which our loyal donors swiftly addressed; providing 100 computers and Wi-Fi hotspots and more than \$82k in emergency funding for tuition shortfalls enabling students to enroll for the fall semester.

Throughout FY2020, which ended June 30, more than 1,800 alumni, friends, and corporate partners contributed over \$6.6 million dollars in private fundraising activities through 4,220 gifts to support student scholarships and service initiatives at CSU Pueblo’s campus. From providing more than

\$2 million through 900 scholarships to CSU Pueblo students, to funding 27 cross-campus initiatives during our Fifth Annual #LoveCSUPueblo Give Day on Oct. 29, private contributions continue to provide sustainable financial support to CSU Pueblo.

This work has only been made possible by truly dedicated and talented Foundation 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


Chad Heberly, 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, 2020 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.





Team Tundra — Mark & Carol Rickman and Kathleen Drozda — joined Georgiann Lymberopoulos, Todd Kelly and Dr. Timothy Mottet via Zoom for the 2020 President’s Gala Virtual Cocktail Hour.



CSU Pueblo Foundation board members and CSU Pueblo President, Timothy Mottet, welcomed our generous donors to the 2020 President’s Club Soirée. Pictured l-r: Dr. Donna Souder Hodge, Tracy Samora and Niki Toussaint



AVERAGE STUDENT COST

2020/2021 Annual Tuition & Fees	\$10,664*
2020/2021 Average Book Cost	\$1,800*
2020/2021 Room & Board	\$11,440**

* 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)	\$.08
Scholarships Awarded Fall 2020	900
Percentage of expenditures used to support students and University programs	88%



Center for Integrated Health & Human Inquiry

In August, Colorado State University Pueblo celebrated the grand opening of the new Center for Integrated Health and Human Inquiry (CIHHI). The facility, formerly the Psychology building, is a hub for interdisciplinary learning and collaborative spaces.

The CIHHI supports the various disciplines of Human Health, Nursing, Social Sciences and the Humanities. It also hosts the Wolf Pack Wellness Center and the Counseling Center available for health needs of the campus community. CIHHI offers collaborative spaces, nursing simulation labs and distance learning classrooms.

CSU Pueblo now boasts the CIHHI being home to the Doctor of Nursing Practice (DNP) program which is part of the School of Nursing. Joe Franta, the inaugural Dean of the College of Health, Education and Nursing introduced CSU Pueblo’s first two DNP graduates, Dr. Kati J. Foechterle and Dr. Ronda Orndoff. Foechterle and Orndoff were recognized in celebration of earning the first doctoral degrees in the university’s history.

Aaron Till Senior, Nursing

Helen M. McLoraine Scholarship

“I have always been the individual to give back however I can, and I have found that the best way for me to give back is through my nursing career. Even though my parents and I are very hard workers, we have never been financially stable. I never wanted my finances to stop me from my dream of becoming a nurse. As a first-generation student that diploma will be more than a piece of paper.”

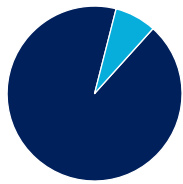


Tabatha Maestas Junior, Social Work

Reisher Scholars Program

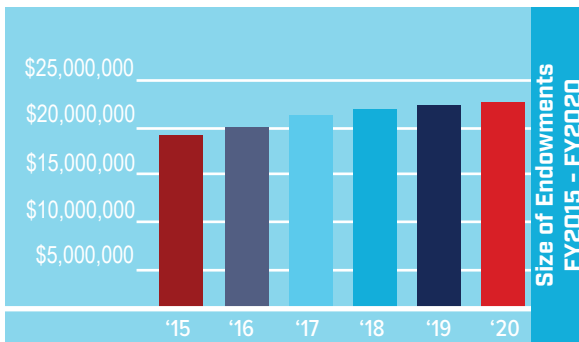
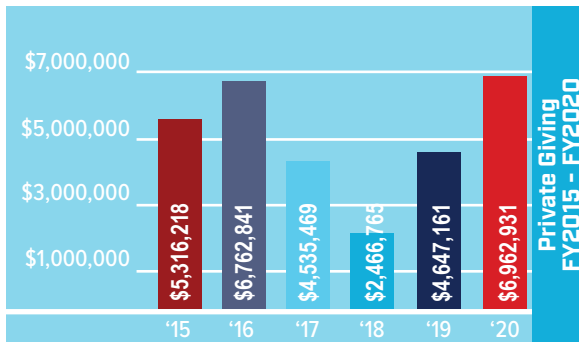
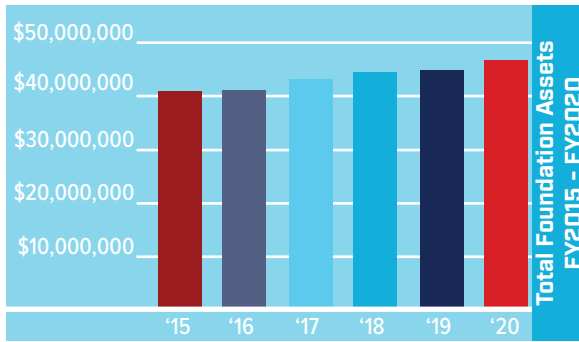
“This is truly life changing; not just for me but also for my children, who are 10 years, 2 years and 11 months. I am a first-generation college student, Latinx woman. I can say without a doubt that continuing my education was the best decision I have ever made. Thanks to the Reisher Scholars program, I will accomplish two goals by graduating with my bachelor’s degree in social work and do so with little to no debt.”





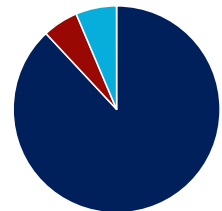
NET ASSETS

- 7.7% Unrestricted
- 92.3% Restricted by Donor



- 5.6% Administrative Expenses
- 6.4% Fundraising Expenses
- 88% 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, 2019 to June 30, 2020

BALANCE SHEET

ASSETS

Cash and cash equivalents	\$703,293
Accounts receivable	-
Unconditional promises to give, net	1,948,061
Marketable securities	41,007,633
Prepaid expenses	24,560
Miscellaneous assets	602
Beneficial interest in remainder trusts	225,057
Investment in limited partnership	249,948
Commercial real estate projects	2,392,247
Leasehold improvements and office equipment	34,357
Less accumulated depreciation	(24,126)

TOTAL ASSETS **\$46,561,632**

LIABILITIES AND NET ASSETS

LIABILITIES

Accounts payable	\$4,136,820
Other liabilities	69,650
Line of credit payable	2,027,137

TOTAL LIABILITIES **\$6,233,607**

NET ASSETS

Unrestricted net assets	\$3,088,497
Donor restricted net assets	37,239,528

TOTAL NET ASSETS **\$40,328,025**

TOTAL LIABILITIES AND NET ASSETS **\$46,561,632**

REVENUE AND SUPPORT

Contributions	\$6,500,415
in-kind contributions	110,835
Fundraising revenue	351,681
Dividends	1,809,513
Interest	2,441
Realized gain on sale of marketable securities	(651,971)
Unrealized gain on marketable securities	581,043
Miscellaneous revenue	20,421
Changes in value of split-interest agreements	(21,328)
Investment Expense	(93,134)

TOTAL REVENUE AND SUPPORT **\$8,609,916**

EXPENSES

Program expenses	\$7,327,860
Management and general	462,298
Fundraising	531,450

TOTAL EXPENSES **\$8,321,608**

OUR LEADERSHIP TEAM

TRUSTEES

Chad Heberly Chair	Michael Occhiato Ruben Pena
Brandice Eslinger Vice-Chair	KC Savage
Mike Baxter	Jackie Seybold
Russell DeSalvo, III*	Darrin Smith
Dominic Gallina	Christopher Turner
Mia Gilbertson*	Barbara Vidmar
Angela Giron	Taylor Voss*
Jessica Gottlieb	Kathy Walker
Todd Kelly*	David Williams
Mark Magnone	Chris Wiseman
Louis Nazario	
Timothy Mottet*	

*Ex-Officio

SUSTAINING TRUSTEES

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

FOUNDATION STAFF

Todd Kelly President/CEO
Valerie Gallegos Director of Budget & Finance
Sandy Lundahl Director of Foundation Scholarships
Sammi Mutz Assistant Director of Gift Processing & Stewardship
Susie Pagnotta Director of Data Analysis & Gift Processing
Amber Shipley Director of Communications, Events & Annual Giving

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