



Foundation

21

ANNUAL REPORT

22





EXIT

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OUR MISSION

The University of Louisiana Monroe (ULM) Foundation solicits, receives, and administers private gifts for the benefit of the University of Louisiana Monroe, its faculty, facilities, and its students.



Gifts to the ULM Foundation provide scholarship opportunities for ULM students, research support of faculty and students, assistance with scholarly travel opportunities for faculty and students, facility enhancements, equipment purchases, and many other donor-directed initiatives.

2022

\$5.05M
RAISED

\$969,000
SCHOLARSHIP
AWARDS

\$1.50M
FACULTY
SUPPORT

DONOR GIFT HIGHLIGHTS

2022

ESTATE GIFT OF THE YEAR

Stamper Campus Beautification Endowment Spirit of the Warhawk Endowed Scholarship

Long time benefactor, Charles Freeman Stamper, further committed his love and support for ULM by bestowing the university with a large estate gift. The endowment will exist in perpetuity and support ULM campus enhancements and beautification projects. It will also further fund the very important Spirit of the Warhawk Endowed Scholarship.



FREEMAN STAMPER

"With state funding being far less than in the past I felt that it was incumbent upon me to lend a hand and help correct the monetary challenge."

"I do love ULM and I do love giving, I have to give to be a complete Freeman."

DONOR GIFT HIGHLIGHTS

Merlin Reiser Super First Generation Scholarship

Local entrepreneur Merlin Reiser decided to up the game and create a Super First-Generation Scholarship for ULM students. Through this endowment, along with a Louisiana Board of Regents match, this scholarship's purpose is to increase college access and success for low-income first-generation students, enhance institutional efforts to provide need-based aid to undergraduate students, and provide additional opportunities for benefactors to support the University of Louisiana Monroe.



MERLIN REISER

Merlin Reiser had \$6,000 in his bank account when he moved his young family to Monroe, Louisiana, to open the community's first Sonic drive-in in 1977. As a growing franchise business, Sonic provided tremendous opportunity for this entrepreneur looking to grow. And grow it did. Over the next four decades, The Reiser Group became one of the largest franchisees within the Sonic system with 38 locations throughout Louisiana, Alabama, Florida and Texas. Now retired, Merlin enjoys looking for ways to give back to the communities that supported his business, particularly where education is concerned.

Nick Dimos College of Business Scholarship Endowment



NICK DIMOS

"My father, Nick Dimos was a good, kind and hard-working Christian man. He was born in what is now the Republic of North Macedonia. At about age 20, he came to the USA and ultimately settled here in Monroe, LA. Later, he went back to Yugoslavia, as it was then called, to marry. The plan was to live there. WWII changed that. After I was born, Dad returned to Louisiana to make arrangements to move. The war caught him here and Mom and me in Yugoslavia. He provided for us during those 12 years and was finally able to bring us here. Although Dad did not have the opportunity to go to college, he gave me that opportunity. I have provided this scholarship at ULM to honor him and to thank him for his love and provision."

ULM Honors Program Lounge Renovation and Justice Marcus Clark First Generation Endowed Scholarship

With the use of his retirement excess campaign funds, Justice Marcus Clark (Ret.) made a gift to the ULM Honor's Program and established an endowed first generation scholarship. These funds made possible a renovation that updated the Honor's Lounge with new paint, flooring and furniture. This renovation will have an integral role in recruiting students to the Honor's Program, which recently enjoyed a 60 percent cohort increase from the previous academic year.



ULM HONORS LOUNGE RENOVATION

The lounge also serves as a haven for the existing honor students, with a fully stocked study room, library, coffee bar, popcorn bar and ping pong table. Honor's students love spending time in the lounge, studying, playing games and just enjoying the special space that has been created for them.

Football Players Lounge

Doug Wells, Joey Trappey, Loura and Guy Barr, Holyfield Ventures, LLC, Robertson Fruit & Produce, Inc.

In 2021 a need was identified by head football coach Terry Bowden that a space for players to gather, study, bond, relax and even get their hair cut was a reality that needed to come to fruition. In fact, at the time ULM was the only program in the Sun Belt Conference that did not have one. The idea of the Football Players Lounge was born. Because of the generous financial support from the ULM family and local businesses over \$300,000 was privately raised. The Football Players Lounge was completed and unveiled in 2022. Now players have a place where their nutritional needs can be supplemented with a full kitchen, snack bar, fruit and vegetable station and a whole lot more. It has become the envy of the Sun Belt conference.

Shane Desselte Superior Graduate Student Scholarship Endowment

Shane P. Desselte, RPh, PhD, FAPhA established a scholarship endowment specifically for persons pursuing a Master of Business Administration (MBA degree). Dr. Desselte is pharmacist, yet his doctoral graduate degree is in the business and administrative sciences. He applies the knowledge he gained from that experience into his teaching, where he helps pharmacy students

learn how to navigate the healthcare system, advocate for policy that improves access to medicines for needy patients, and provide administrative supervision and oversight over support personnel and processes in pharmacies so that they run as efficiently and as patient-centric as possible. His research for years has been concerned with the proper delegation to and effective engagement of pharmacy support personnel such as technicians. Dr. Desselte recalls very fondly how his graduate-level courses in organizational behavior, management, and marketing helped pave the way for a successful academic career, where he is extensively networked on an international basis. He likewise is so very fond of the entire academic institution, recalling the many good times he had and lifetime memories built with his close friends that have lasted a lifetime, and he is still in touch with those closest to him even in spite of living in various parts of the U.S. during his career. Dr. Desselte still keeps close tabs on ULM sports with the indelible impact made upon him by ULM's 1-AA national championship in football in 1987. Dr. Desselte will be forever connected to the university.



SHANE P. DESSELTE

McPhearson/McEacharn Opportunity Scholarship

Dr. Michelle McEacharn, University of Louisiana Monroe's Dean of the College of Business and Social Sciences, along with her family, established the fully-endowed McPhearson/McEacharn Opportunity Scholarship in honor of McEacharn's mother, Flora "Snookie" McPhearson, and late husband, Roger "Bucky" McEacharn. The scholarship will be awarded each year to a

non-traditional ULM student (aged 28 years and older) majoring in accounting or pursuing the post-baccalaureate certificate in accounting.

"Years ago, when I was a non-traditional student struggling to manage school and a family with little to no resources, I received a \$200 scholarship from someone who had been generous and thoughtful enough to provide those resources," said McEacharn. "That \$200 meant more than I can say to both me and my family. I have since been blessed with the opportunity to be in a position now where I can give back to help someone else. It's an honor for me and my family to be able to establish this endowed scholarship dedicated to other nontraditional accounting students in honor of our late mother who instilled a strength and dignity in us, and my late husband who believed in me so much that I began believing in myself."

The endowed status of the scholarship will live on in perpetuity to ensure financial support for generations of non-traditional students.

Kitty DeGree Foundation

The Kitty DeGree Foundation contributed critical funding for Choral Music, part of the School of Visual and Performing Arts, and an accredited institutional member of the National Association of Schools of Music. ULM offers the Master of Music Education degree, the Bachelor of Music degree with concentrations in performance, theory and composition, piano pedagogy, and music education, and the Bachelor of Arts in Music degree. Bachelor of Music degrees in music education lead to teaching certification in instrumental or vocal music.

JBK Foundation Graduate School Endowment John Smith and Kim Clement

John Smith and his late wife, Billie, have been generous supporters to ULM for years. His daughter, Kim Clement, now joins the family philanthropic generosity as they created the JBK Foundation Graduate School Endowment. This family thoughtfully understands the challenges facing women who began their college career, only to find they were unable to continue due to "life happening while they had other plans." This endowment is being offered for students to support their efforts in obtaining a graduate degree that can be life-changing for them.



MCEACHARN FAMILY

Causey-Boyd Superior Graduate Scholarship in Pharmacy

Steve and LeAnn Causey Boyd



CAUSEY-BOYD FAMILY

Steven and LeAnn Boyd established the Causey-Boyd Endowed Scholarship to honor Nolton W. Causey, Jr and his impact to the profession of pharmacy, his community, and future generations of pharmacists. Nolton W. Causey, Jr, alumni of the ULM College of Pharmacy (class of 1969) served the Natchitoches community as a dedicated and well-loved independent community pharmacist for nearly 50 years. Additionally, throughout his career he was an active member of the Louisiana Pharmacist Association (LPA) and a founding member of the Louisiana Independent Pharmacist Association (LIPA). Nolton's middle daughter, LeAnn Causey Boyd, alumni of the ULM College of Pharmacy (class of 2002) along with her husband Steven T. Boyd, pharmacist, worked alongside Nolton in the family's pharmacies and businesses. In 2015, Nolton, LeAnn, and Steve founded the first Pharmacy Benefit Manager in the State of Louisiana built on a transparent business model. Nolton's grandson and LeAnn's son, Landon, is also a ULM alumnus. Recipients of this scholarship have an interest in making positive impacts in their communities through entrepreneurship and the practice of pharmacy.

Heritage of India Scholars Endowment

The Heritage of India Society, a local organization created to bring awareness to Indian culture, recently established the fully endowed Heritage of India Scholars Scholarship at the University of Louisiana Monroe Foundation. The scholarship will support deserving undergraduate and graduate students of Indian heritage in their academic endeavors at ULM.

Latha Jois, president of the Heritage of India Society, spoke at the check presentation. "We hope to support and inspire our new generation with the tools to carve their own path through

education and motivate others in the community to do the same," she said. "By supporting younger generations, we can continue to build and sustain a prosperous community."



HERITAGE OF INDIA SOCIETY

The Heritage of India Society was founded in 1999 by a small group of people of Indian origin in the Monroe area. The purpose of the association was cultural, educational, and charitable in nature. Apart from promoting religious and cultural activities among the members of Indian origin, it was also intended to make the local public aware of Indian culture and contribute towards the charitable activities in the Monroe and West Monroe area communities. The organization also assists in educating and learning all who are interested in Indian culture. Currently, the organization has members from Monroe, West Monroe, Ruston, Sterlington, and the surrounding area.

Como Charitable Foundation Scholarship

The Como Charitable Foundation works to improve the lives of people in Franklin Parish. Its mission is to help people help themselves with education at the forefront of the initiative. Since 2017, the Como Foundation has supported 152 ULM students with over \$310,000 in scholarships. Covering all majors, the scholarship is specific to Franklin Parish residents who engage in volunteer work in their area.



The Como Foundation was established by the late Luella Snyder, who grew up in the Como community in Franklin Parish, Louisiana. Luella graciously supported the organizations she felt were important to the community she held dear, and she wanted those entities to thrive because they were also important to her. Luella Snyder never sought recognition for her contributions. She moved quietly behind the scenes to ensure that deserving local groups received the financial help they needed to flourish, and many have benefitted from her generosity.

Luella Snyder left a mark on the landscape of Franklin Parish with the gift of the Como Charitable Foundation, which will continue her work to benefit the area and its people for years to come. Regions Bank's ULM Educators Rising Program The Regions Bank's ULM Educators Rising Program is transforming how we develop aspiring teachers. Starting with middle and high school students, Educators Rising provides passionate young people with hands-on teaching experience, sustains their interest in the profession, and helps them cultivate the skills they need to be successful educators.

Sponsored by Regions Bank, the goal of ULM's Educators Rising program is to increase the number of qualified teachers in our area by encouraging students to choose education as a career path while offering college credit opportunities, mentor relationships with college professors, scholarships, and leadership development sessions.

LONG-TERM BENEFACTOR HIGHLIGHTS

Mary Goss Charities

The Mary Goss Charities Foundation was established in 1918 after the death of Mrs. Mary Goss, a widowed, small business owner and philanthropist in Monroe. She left the entirety of her small estate to take care of those "less fortunate than herself." In 1986, the Mary Goss Charities Scholarships were created at ULM to provide tuition for students with financial need from Ouachita Parish and surrounding Northeast Louisiana. Since the creation of these scholarships, over \$575,000 has been awarded to needy, local students and annual donations continue to increase the impact of these scholarships.

Pharmacy Scholarships

The Louisiana Wholesale Drug Company was founded in 1979 when a group of Louisiana independent pharmacists recognized the need to form a company that could consolidate purchasing and maximize pricing. The new venture offered wholesaler equity, thereby enhancing the representation and control of its shareholders in the marketplace.



In the past 38 years LWD has grown from 51 pharmacists to 178 stockholders serving over 275 stores and is one of the top three privately held companies in southwest Louisiana. LWD is proud to have funded over \$200,000 worth of scholarships to over 40 ULM pharmacy students since 2013.

Walgreens

Walgreens is pleased to fund a diversity scholarship at the ULM School of Pharmacy for full time students who are interested in community pharmacy. Awarded since 2009, ULM Pharmacy students have received more than \$50,000 in tuition assistance from Walgreens.

Pharmacists are among the most accessible and trusted members of the health care community. With more Americans living longer and taking more medications, the demand for these highly skilled professionals is only expected to increase.

CVS/caremark™

That's why CVS is proud to support the most promising pharmacists of tomorrow with the CVS Caremark Scholarship for ULM School of Pharmacy full-time students. Since 2011, over \$55,000 has been awarded to future pharmacists.



LETTIE PATE WHITEHEAD

Lettie Pate Whitehead Scholarship

Over the past 38 years, the Lettie Pate Whitehead Foundation has awarded scholarships to ULM students in excess of \$2 million. Recipients are deserving female students with financial need in the areas of nursing, pharmacy, and allied health.

With headquarters in Atlanta, Georgia, the Foundation's grantmaking is inspired by the life of Lettie Pate Whitehead Evans, an extraordinary philanthropist and businesswoman. She was the wife of Joseph B. Whitehead, one of the original bottlers of Coca-Cola. When Mr. Whitehead died at an early age, Lettie Pate took over her husband's bottling business and real estate interests, guiding both to great success. She became one of the first female directors of any major American corporation when she was appointed to the board of The Coca-Cola Company in 1934.

Mrs. Whitehead gave generously to educational institutions throughout her life. At her death The Coca-Cola Company honored her thus: "Endowed with material things, she had a conviction that she held them as trustee for the poor, the meek and the unfortunate."

The Lettie Pate Whitehead Foundation has awarded more than \$767 million to educational institutions since inception.

DONOR GIFT HIGHLIGHTS

2022

PRESIDENT'S MESSAGE



JOHN F. JONES
ULM FOUNDATION PRESIDENT

The continuing growth and evolution of the University of Louisiana Monroe is an amazing process to be a part of. It is dynamic, it is taking place at all levels of our campus and our community, and it is being driven by people who believe in a common vision of success.

That success is succinctly defined by a simple sign that hangs in President Ron Berry's office: **"Student Centered: Excellence Driven."** However, President Berry's vision for ULM takes us all into a much deeper understanding of how we should view a key outcome for higher education. It is much deeper than just 'success,' and it cuts to the core of who we are as a society, a nation, and as individuals.

“*The vision for ULM must continue to transform lives and serve as a catalyst for breaking the cycle of poverty in Northeast Louisiana and bringing true equality, inclusiveness, and opportunity for all citizens in our region.*”

— **President Ron Berry**

And it is no surprise that this unique brand of vision, success, and excellence goes far beyond the boundaries of northeast Louisiana. Students from all over the United States and throughout the world call ULM their “University of Choice” and chose it over hundreds of other quality institutions. Many of you who are reading this are among those who made that decision. Here is a spoiler alert—there are many more just like you who are enrolled now and others planning to enroll soon.

Your ULM Foundation is proud to be one of the many stakeholders who play a significant role in ULM's success and believes in that common vision. The work we do and the time and dollars we contribute, touch nearly every facet of our campus, and that includes students, faculty, and facilities. The Foundation fills a critical funding and partnership gap caused by pressured state funding, post COVID dynamics, and rapidly increasing costs. The good news is, we are pretty darn good at it thanks to you and the tireless work of our Foundation staff.

I am happy to report the ULM Foundation had a very good year in 2022 but faced the same head-winds similar entities had with a decrease in assets due to mostly a tighter monetary policy, including an increase in interest rates by the Federal Reserve to limit inflation. Even with outside pressures, the Foundation raised more than \$5 million dollars, funded approximately \$970,000 in scholarships, and provided nearly \$1.5 million in faculty and academic support.

I encourage you to spend some time reviewing our annual report. We have done much, but we still have much to do. Thank you for your love for ULM, your generosity of time and money, and for the guidance you provide in so many areas.

Sincerely,

John F. Jones

ULM Foundation board of directors



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PAST PRESIDENT



ALBERTA GREEN
SECRETARY / TREASURER



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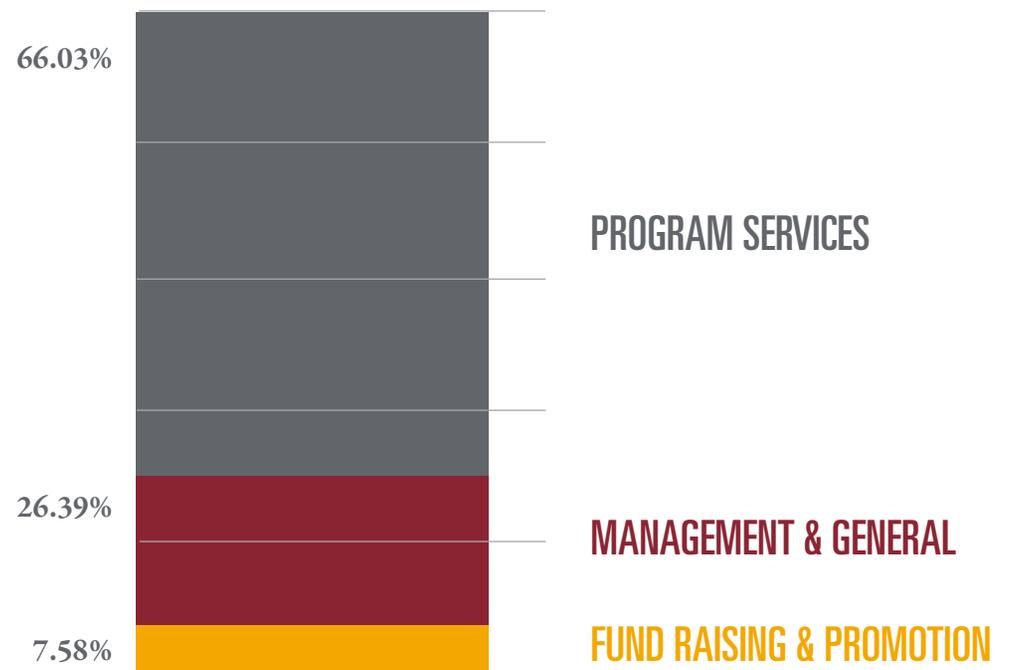
FINANCIALS

CALENDAR	TOTAL ASSETS	TOTAL INVESTMENTS	RETURNS LEQSF/ENDOWMENTS
2022	\$83.0 M	\$75.3 M	-12.97% / -13.48%
2021	\$95.8 M	\$88.3 M	12.19% / 14.75%
2020	\$84.5 M	\$76.8 M	11.91% / 12.46%
2019	\$77.6 M	\$67.5 M	18.90% / 21.30%
2018	\$65.8 M	\$55.7M	-2.00% / -2.70%



ALLOCATION OF EXPENSES

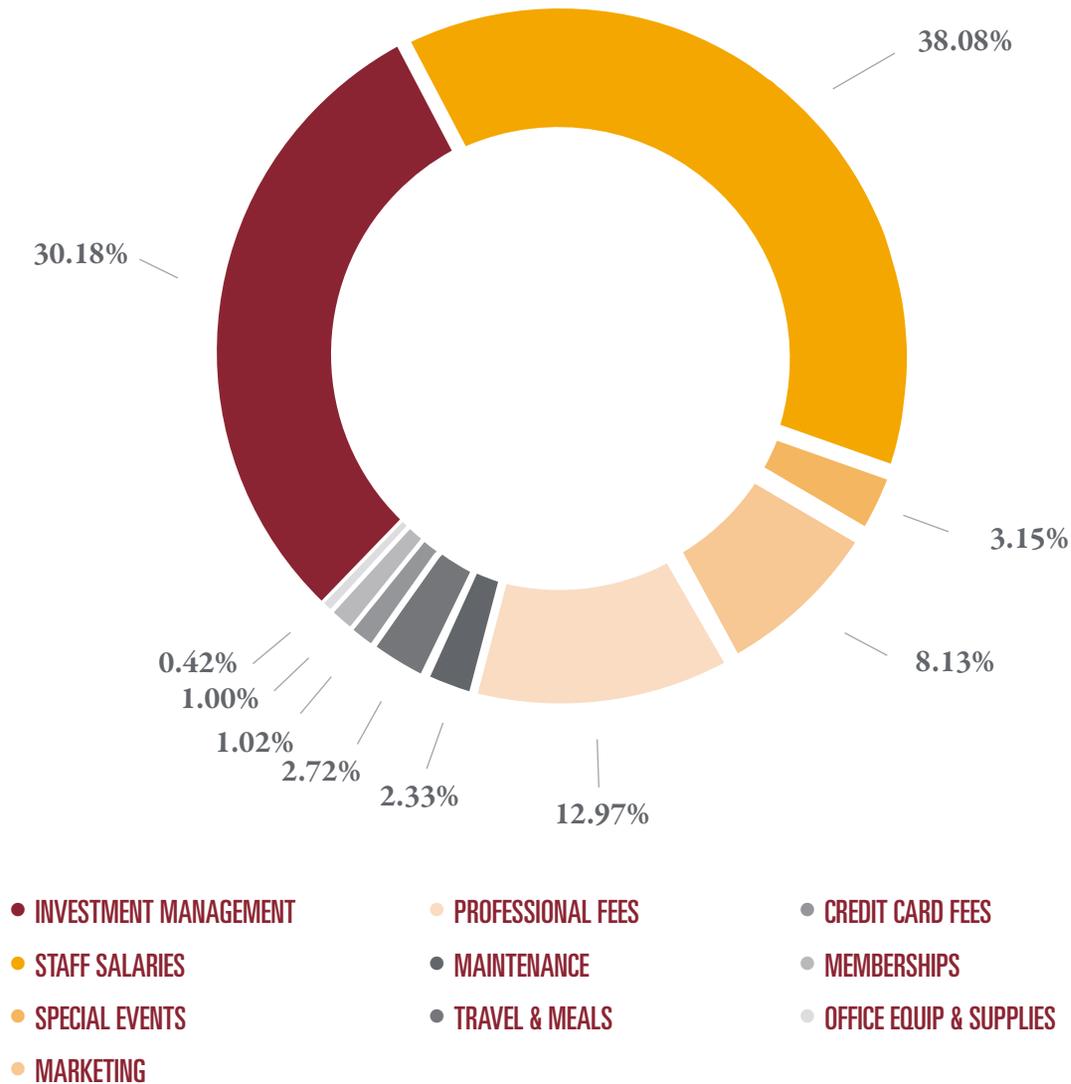
Overall Foundation Expenses



IN 2022 THE ULM FOUNDATION FUNDED

\$969K
IN STUDENT SCHOLARSHIPS
AND INTERNSHIPS

\$1.50M
IN FACULTY AND
DEPARTMENTAL INITIATIVES





One-Time Donation

The most common donation type, one-time donations, occurs when someone gives a specific monetary amount to the ULM Foundation once. Even if that person gives the same amount to the ULM Foundation several times throughout the year, because there isn't a planned recurring schedule or written expectation of when and how the donation will be made, they are all considered one-time donations.

Recurring Gifts

When someone decides to commit to a consistent recurring schedule of donating, this is considered a recurring gift. One benefit of recurring gifts is that they help give the person donating by spreading their contribution out over time rather than in one lump sum. For example, you might not be able to donate \$300 all at once, but you may be able to budget an extra \$25 a month as a recurring gift.

Donate Stock

Did you know you can donate long-term appreciated securities such as stock and bonds? And it's easier than it may seem. When you donate the stock itself—rather than selling or liquidating the security—not only do you remove a step in the process, but you won't need to remove the long-term capital gains taxes paid from the overall sum. This increases your donation amount up to 37% more. To transfer stock, call Charles DiGiulian at 318-342-3683, and that's all there is to it.

Planned Gifts

It can be hard to think about what happens after we're gone, but setting up a planned gift is a great way to ensure the ULM Foundation is included in your arrangements. There are a number of ways you can use planned giving to build charitable giving into your life plans, even after death. Some can even help you lower your taxable income now! Consider planning ahead now and explore some of these ways for giving after life:

Bequest

- A specific bequest of money or property naming the ULM Foundation as a beneficiary
- Residual bequest of the remainder of the estate after specific bequests

- Contingent bequest in which the gift to the ULM Foundation occurs if the original beneficiaries die before the donor

Planned Gift

- Charitable Remainder Trust
- Charitable Gift Annuity
- Charitable Lead Trust
- Call 318-342-3636 or email foundation@ulm.edu for information

Life Insurance:

- The ULM Foundation can be named as the beneficiary of a new life insurance policy, which is revocable by the donor
- The ULM Foundation can be named as the owner and beneficiary of a new life insurance policy, which is irrevocable
- An existing life insurance policy can be changed to include the ULM Foundation as a beneficiary or to transfer ownership of the policy to the ULM Foundation

Qualified Retirement Plan:

- The ULM Foundation can be named as the beneficiary of a tax-deferred retirement plan, including IRA, 401(k), 403(b), Keogh, etc.

In-Kind Donations

Donations don't need to be monetary to make an impact. In-kind donations are a gift of goods, services, time, or expertise. When you provide an in-kind donation, you're helping to alleviate some of the stress the nonprofit undergoes and allows them to use their financial resources in better ways. For example, when you donate your time and expertise, you're allowing the nonprofit to put more money toward their mission instead of additional staff or contractors, help existing staff work more efficiently by taking on some of the load, and bring experience to the organization that might otherwise need to be outsourced. Gifts of goods, like laptops for homework centers or art supplies for seniors, keeps the nonprofit from spending funds on the things they need.

GIFT TYPES

No matter your situation, there are many types of donations that can be made to the ULM Foundation. For more information or to donate, check out ulm.edu/give.

WHAT TO EXPECT IN 2023 AND BEYOND

- ▶ **Doctorate of Physical Therapy with first class of 48 students**

- ▶ **Completion of Campus Master Plan**

- ▶ **Complete Renovation of Sugar Hall**

- ▶ **Development of new programs:**
 - Doctorate of Occupational Therapy
 - Doctorate of Nursing
 - Bachelor in Crisis Management



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ULM

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at Monroe

University of Louisiana
at Monroe

SBC



ulm.edu/foundation

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