



Foundation

ANNUAL REPORT

20
21





TABLE OF CONTENTS

| | |
|--------------------|----|
| Mission..... | 4 |
| Impact..... | 5 |
| Community | 6 |
| Leadership..... | 10 |
| Financials | 12 |
| Looking Ahead..... | 18 |



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 for faculty and students, facility enhancements, equipment purchases, and many other donor-directed initiatives.

2021

8,500
STUDENTS

\$7.87M
RAISED

\$1.00M
SCHOLARSHIP
AWARDS

\$1.46M
FACULTY SUPPORT

DONOR GIFT HIGHLIGHTS

2021



DHU THOMPSON

ENTREPRENEURIAL PITCH COMPETITION

The Entrepreneurship Pelican Cup business competition developed by ULM in partnership with sponsor Dhu C. Thompson, founder and retired CEO of Delta Plastics, was launched to encourage students to develop their innovative ideas.

Thompson is a distinguished ULM alumnus and founder, past owner, and former chairman of the board for Delta Plastics, producer of agricultural irrigation tubing, and the largest recycler of plastics in Arkansas. He is also the former owner and past chairman of the board for Revolution Bag that manufactures EPA-compliant trashcan liners. Thompson's honors include 2004 Arkansas Business Executive of the Year and SBA Person of the Year. In 2019 he sold the Revolution brands to a New York private

equity firm and now focuses on entrepreneurship growth in Arkansas and Louisiana.

Thompson provided \$50,000 in prize money to be presented to students and faculty advisers for first place (\$25,000), second place (\$15,000), third place (\$10,000), elevator pitch (\$2,000), and \$3,000 to faculty for first, second and third places. The 2022 competition was open to all ULM and VCOM students, with future competitions open to all colleges and universities in Louisiana.

The Entrepreneurship Pelican Cup is a real-world entrepreneur education opportunity for college students. Whether they are serious about launching a startup or they want to learn more about entrepreneurship, competitors will gain a greater appreciation of the challenges and opportunities of starting a viable business.

TIMBERLAND ESTATE GIFT

Marsha D. Griffin, ULM '70 BA in Office Management and '72 Master of Business Administration, bequeathed a forty plus acre tract of pine timber in Union Parish in honor of her mother, Beatrice Nolan Griffin, to be designated as the Nolan-Griffin Memorial Fund. Proceeds from the timber management will fund scholarships for deserving students in the College of Business and Social Sciences.

LETTIE PATE WHITEHEAD SCHOLARSHIP

Over the past 37 years, the Lettie Pate Whitehead Foundation has awarded scholarships to ULM students in excess of \$1.79 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.

THE WELLS FAMILY COLLEGE OF BUSINESS AND SOCIAL SCIENCES SUPER SUPERIOR GRADUATE ENDOWED SCHOLARSHIP

The Wells family, lifelong supporters of ULM in numerous capacities, saw an opportunity in the College of Business and Social Sciences to help hardworking undergraduate students graduating in Accounting achieve their dreams of pursuing a Master's Degree in Business Administration. As a result of this need, the Wells family established The Wells Family Super Superior Graduate Endowed Scholarship. This endowment will ensure the success of future ULM MBA students for many generations to come.

SCHOOL OF CONSTRUCTION MANAGEMENT

Panel Truss of Texas, Inc., and its affiliates is a privately-owned company that designs, engineers, manufactures, and sells structural wooden roof and floor systems. The Company has established an excellent reputation in its nearly 50 years in business and is known for its exceptional quality and customer service. Panel Truss of Texas is owned by brothers, Bo and Donnie Powers, from Tallulah, Louisiana. Both are alumni of the ULM School of Construction Management (SOCM) Program. On behalf of Panel Truss, the Powers' brothers committed a \$100,000.00 gift to the SOCM Capital Campaign for new facilities and renovations.



STAPLETON FAMILY

MARY ELLEN SOIGNIER STAPLETON ENDOWED SCHOLARSHIP

Ellen Soignier was the ninth of 11 children born to Mr. and Mrs. John Chester Soignier. After graduating from St. Frederick High School, she chose the demanding curriculum of accounting at ULM. Ellen was a dedicated student and worked part-time to help pay for her education. It was at ULM that she met her future husband, Jimmie Stapleton. Ellen graduated in 1990 and began her career in accounting. She and Jimmie married and had three children. Together, the Stapletons were strong supporters of the power of education to change lives. Even breast cancer did not stop her from volunteering at schools and helping teachers and administrators. Ellen died in 2010 at age 41. Scholarships of at least \$2,000 per semester will be awarded to a student or students meeting these requirements: a sophomore or higher in the College of Business and Social Sciences, be a Louisiana resident, work at least 20 hours a week, and have a minimum cumulative 3.0 GPA.

JACK & CORALIE WHITE REHEARSAL ROOM

Michael McKay, ULM '80 BA in Accounting, and Catherine McKay, ULM '84 in Pre-Law, graciously assumed the role of anchor donors on a large capital improvement project for the Sound of Today marching band. As two former Sound of Today members they felt passionate about helping with this project. As a result of their very generous philanthropic gesture, the renovations were completed on time and the Sound of Today Band room was affectionately renamed the Jack and Coralie White Rehearsal Room after two ULM icons.

DR. PAXTON AND NELDA OLIVER ENDOWED PROFESSORSHIP IN SPEECH-LANGUAGE PATHOLOGY

Former ULM professor and Associate Dean of the College of Health Sciences, Dr. Paxton Oliver, ULM '68 BA Government and ULM '72 Certification in Speech and Hearing Therapy, and his wife Nelda Oliver, ULM '68 BA in Social Work, graciously established the Paxton and Nelda Oliver Endowed Professorship in Speech-Language Pathology ensuring future professors have the resources they need to educate students in this critical discipline.

FRANK AND SUSAN HOFFMANN SUPERIOR GRADUATE SCHOLARSHIP

Two University of Louisiana Monroe graduates and respected community leaders, Frank and Susan Hoffmann, have invested in future ULM students pursuing graduate degrees in education and business. Their contribution will be matched by the Louisiana Board of Regents Support Fund. The \$100,000 endowed scholarship's purpose is to recruit and retain high-quality graduate students in the School of Education and the College of Business and Social Sciences' Master of Business Administration graduate program by alleviating financial obligations.

(Hoffmann continued)

Frank earned his bachelor's degree in education in 1966 and continued to study in the field of education, going on to earn a master's and a doctorate, all from ULM. He devoted his career to education working for 39 years at the Ouachita Parish School System as a teacher, coach, principal, personnel director and assistant superintendent.

Outside of his career in education, Frank served his community for 12 years as a legislator representing District 15 in the Louisiana House of Representatives and more than 40 years as the Voice of the Warhawks. As a state representative, the Louisiana Association of Principals named him Legislator of the Year for his dedication to education. In 2015 when he began his 40th year as the Voice of the Warhawks, he received the McNaughton Chapter of the College Hall of Fame Distinguished American Award and was recognized by the Louisiana Sports Writers Association with several awards, including best play-by-play. He received a variety of honors from ULM, including the 1995 Outstanding Alumni Award from the ULM College of Education, the 2012 ULM George T. Walker Lifetime Achievement Award, and the 2015 ULM Athletic Hall of Fame induction.

Susan earned her bachelor's degree in business in 1977 and her Master of Business Administration in 1980. Additionally, she is a graduate of the LSU School of Banking of the South and the University of Oklahoma Commercial Banking School. As a business professional, she was Market President of JPMorgan Chase Bank in Monroe, LA. During her career with JPMC, she created the largest portfolio of commercial bankers in the Southern region and was selected as the top commercial lender in the South. Susan was recognized in 2000 with the ULM Alumni Golden Arrow Award and in 2019 the ULM Women's Symposium honored her with the Distinguished Leader Award. In May 2021, Susan was awarded the celebrated Monroe Chamber of Commerce Rambin Silverstein Award.



MARILYN AND LOUIS ST. AMANT

MARILYN FRANCES ST. AMANT & LOUIS J. ST. AMANT SUPERIOR GRADUATE ENDOWED SCHOLARSHIP IN GERONTOLOGY

Louis "Lou" J. St. Amant, ULM '70 BA in Health and Physical Education and '71 Master of Administration and Supervision, established the Marilyn Frances St. Amant and Louis J. St. Amant Superior Graduate endowed Scholarship in Gerontology to honor his late wife, Ms. Marilyn. Where Coach Lou was passionate about athletics, Ms. Marilyn was equally as passionate about education. Ms. Marilyn and Coach Lou's names are synonymous with ULM. They are truly ULM icons. Recently Coach Lou received one of the highest ULM honors, The Warhawk Ambassador award which is reserved for individuals whose interests and loyalty are evident in their deeds and actions, reflecting and recognizing the importance of the University of Louisiana Monroe in our local and global community, and demonstrating pride in the University. The recipients are people of such integrity, stature and demonstrated ability that the faculty, staff, students, and alumni take pride in and are inspired by their recognition.

Lou St. Amant served two separate tenures with ULM beginning in 1968 when he served as a Graduate Assistant Baseball Coach through the 1970 season. His first term culminated with an appearance in the NAIA World Series. That team finished the season as runner-up in the 1970 NAIA World Series event.

He later returned to ULM in 1976, as a member of Coach John David Crow's original football staff, serving as wide receiver coach. He was also tasked with head coach responsibilities for the baseball program, a position he held for 18 seasons while also teaching classes in the Kinesiology Department. In 1979, Lou left his football duties and became the first "full time" baseball coach at ULM.

Lou ended his baseball head coaching career with 414 wins including a 1982 Trans America Athletic Conference West Division Championship and 1983 Southland Conference Championship. The 1983 team was the first baseball team from ULM to participate in an NCAA Regional Playoffs while Lou was named Louisiana Coach of the Year in addition to conference and regional honors.

He also served as the "color analyst" for ULM football radio broadcasts for 25 years further solidifying his recognition among the ULM community.

Lou, and his late wife Marilyn, have been lifelong contributors to the university with their time, talent and treasure.

After more than 54 years of service to the university he continues to attend and support ULM functions, provide wise counsel to staff members and serve as a ULM ambassador in the community.



ELIZABETH A. SHAW

MUSICAL INSTRUMENTS ESTATE GIFT

Through her will, Shaw, who died in July 2021, bequeathed her instruments and musical items to the ULM School of Visual and Performing Arts in the College of Arts, Education, and Sciences. Shaw earned a Bachelor of Music from ULM in 1979.

The Elizabeth Shaw Collection of 770 items includes sheet music, vinyl and CDs, musical accessories and seven musical instruments:

- A Steinway baby grand piano
- Gemeinhardt flute and piccolo
- Haynes flute
- Conn-Selmer alto saxophone
- Alexander French horn
- Wagner tuba

Derle Long, Ph.D., VAPA Director shared “We think the Steinway donated by Elizabeth Shaw is around 100 years old. It is a 6-foot model and is placed in Bon Aire, the president’s home.” Sergei Rachmaninoff’s signature is inscribed in the piano as records state he played it during his Oct. 20, 1939, recital in Syracuse, N.Y.

A special time in Shaw’s musical life was from 1975-79. At ULM, then-NLU, she studied music, marched in The Sound of Today, performed in the university orchestra, and was first horn in the wind ensemble. Her instructors and mentors were the late Jerry Vance and the late Director of Bands Emeritus Jack White. As a student, Shaw shared her remarkable talent for playing almost anything brass with

the Monroe Symphony Orchestra (first assistant horn) and performed with the South Arkansas Symphony.

With her ULM diploma in hand and French horn and grandfather’s alto saxophone in tow, Shaw traveled north to the University of Akron, Ohio, to earn her Master of Music. Shaw returned home to Shreveport and studied to become a paralegal. Music remained her passion, performing with Red River Brass, Shreveport Symphony, Lake Charles Symphony, and Rapides Symphony. She would go on to a successful 30-year career with the federal government in the Washington, D.C. area, most of it with the U.S. Patent and Trademark Office. Shaw performed with the Frederick Symphony Orchestra and the Washington Metropolitan Philharmonic (formerly the Mt. Vernon Orchestra).

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 127 ULM students with over \$265,000 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.

DONOR GIFT HIGHLIGHTS

2021

PRESIDENT'S MESSAGE



JOHN F. JONES
ULM FOUNDATION PRESIDENT

“Transition.”

This word well describes how best to view the past year—as one of transition. As a country, we have transitioned into the leadership of a new Administration and transitioned out of a worldwide COVID pandemic. Both have generated healthy debate, uncertainty, and even some sorrow as many lives were lost to the pandemic.

However, it is now time to look ahead and focus on where we are going and not where we came from. Just like businesses, homes, schools, healthcare facilities, and almost every other entity you can name, our university had to overcome some obstacles, but thanks to strong leadership and focus, it has successfully navigated back to near normal status. There is excitement in the air and a sense of purpose as students, faculty and staff return to the campus environment that has been so sorely missed.

The summer months have seen healthy interest and promising enrollment trends for both returning students and the incoming freshman class. Additionally, our faculty members and administration are focused on the fall semester and all the excitement and activity that time of year brings to a university campus. Our Athletic Department is poised and ready for success and achievement on and off the field. President Berry released his strategic plan for the University this past April, and the strategic vision is ushering in unprecedented activity, planning and enthusiasm for ULM's growth and future.

As your Foundation, we are humbled and grateful to our many benefactors and supporters for their generosity—not only for their financial support, but also for participating in campus events and sharing their expertise and insights into so many important areas related to our growth. Even considering the uncertainties caused by COVID, your donations set a record as the highest amounts given to date! Thank you.

ULM is poised for even greater successes and achievements than ever before, and we ask that you join us as we enter our 2023 fiscal year. We will need your involvement to help tell our story locally, statewide, and nationally to help students from all walks of life to make ULM their university of choice.

Sincerely,

John F. Jones

ULM Foundation board of directors



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PAST PRESIDENT



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Cindy Rogers
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Allison Franzen-Camacho, Ph.D.
Taylor Jamison

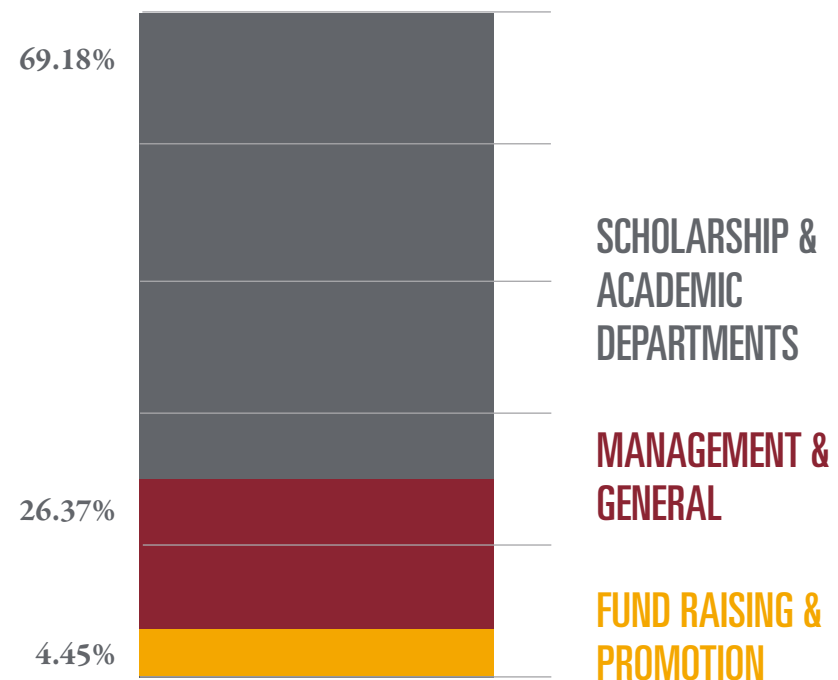
FINANCIALS

| CALENDAR | TOTAL ASSETS | TOTAL INVESTMENTS | RETURNS LEQSF/ENDOWMENTS |
|----------|-----------------|----------------------|-----------------------------|
| 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

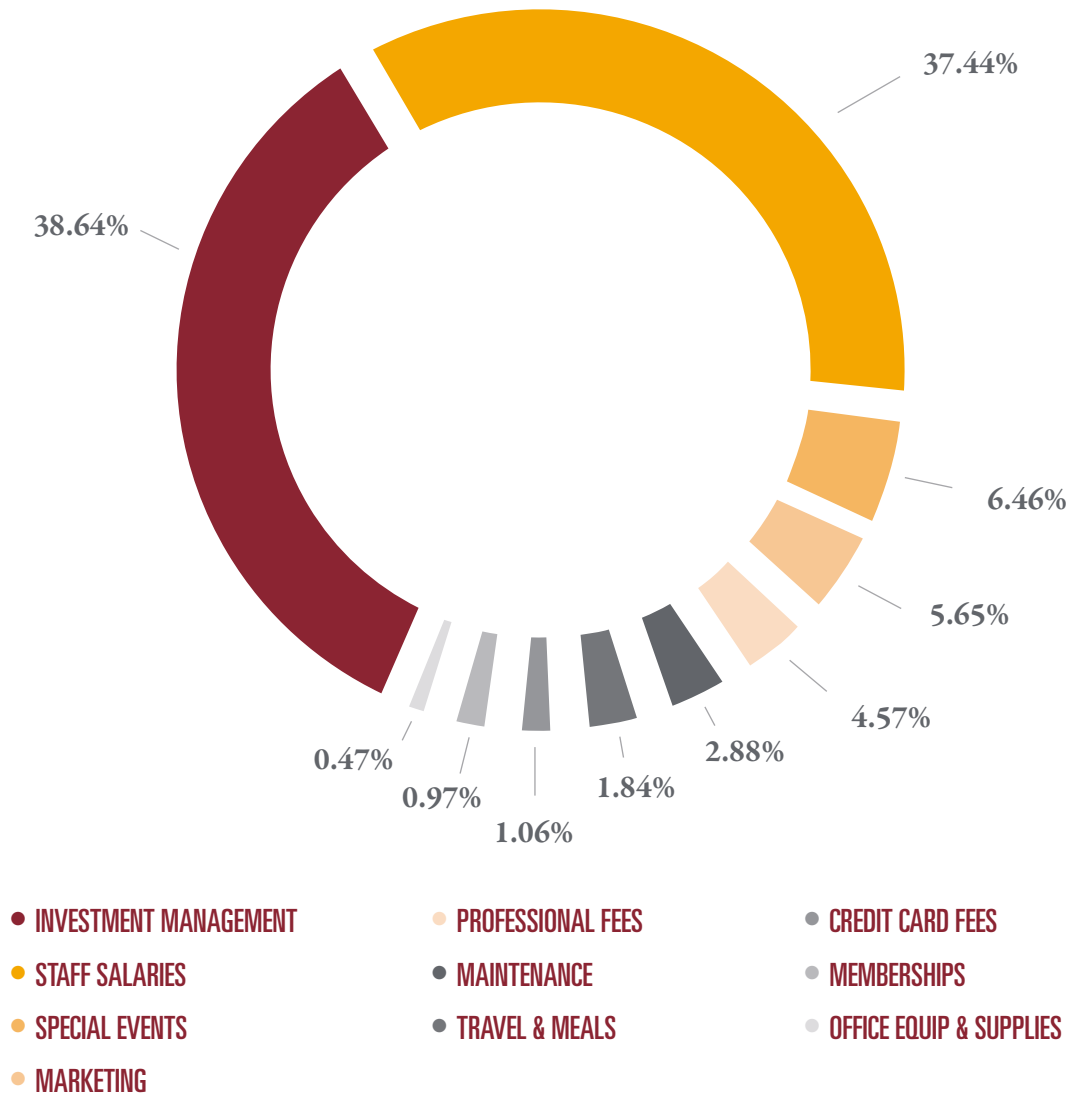
Overall Foundation Expenses



ULM FOUNDATION FUNDED

\$1.00M
IN STUDENT SCHOLARSHIPS
AND INTERNSHIPS

\$1.46M
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.

GOING FORWARD

And So We Press On

Meeting People Where They Are

For over 90 years, the University of Louisiana Monroe has been in the business of changing lives...

and with the support of the ULM Foundation, that work continues to flourish.

The past two years may have been marked with uncertainty, but one thing that remained constant, was the Foundation's, unwavering mission to provide support to the University, our faculty and staff and our greatest asset...our students.

Much of that support is due in large part to our ULM community, and weathering that storm together has made us stronger and wiser. As we march toward our Centennial Anniversary, there is no doubt that we can accomplish anything and we will accomplish it as we have for 90 years...together.

Here's to reaching 100 years.





ulm.edu/foundation

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