




Foundation



ANNUAL REPORT 2024








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.*







**2024**

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.

**\$7.05M**

RAISED

**\$1,237,190**

SCHOLARSHIP AWARDS

**\$2,172,581**

FACULTY SUPPORT



## Foundation

# Donor Gift Highlights 2024

*Changing Lives  
One Student at a Time*

### DONOR GIFT HIGHLIGHTS

#### ULM Football Team Meeting Room and Nutrition Program

When Head Football Coach Bryant Vincent first made it to ULM's campus, he immediately recognized an opportunity to pull in alumni and community members to support his program. One such way was to create a facilities upgrade project, which he broke into two phases over the course of two years. These upgrades have had a significant ROI in recruiting and retaining student-athletes.

The newly renovated Team Room is now a beautiful, comfortable, and inviting place for his players to use to enhance their personal and team play. The lobby of Malone Stadium, also part of Phase 1, went from a blank canvas to a space that proudly displays the ULM brand through vibrant graphics and light displays. Phase 2 is still loading, but these ongoing upgrades continue to put tools in Coach Vincent's hands that allow him to compete with other schools in the Sun Belt Conference.

A second opportunity that Coach Vincent recognized was creating a nutrition program designed to enhance the nutritional support of his student-athletes. By promoting the science behind quality meals and close supervision

of caloric intake, Coach Vincent's Circle of Excellence program is thriving due to the continued support of these benefactors.

Thanks to the many donors who support facilities upgrades and the Circle of Excellence, the football coaches, staff, and the more than 100 student-athletes are better positioned for success.

#### Lynn and James Moore, Jr. Endowed Professorship of Distinction

James and Lynn Moore Jr. continued their decades-long support of ULM by establishing the James and Lynn Moore Jr. Endowed Professorship of Distinction in the College of Business and Social Sciences. Moore, a hotel developer and former oilman, is a 1971 graduate of the ULM College of Business. He and his wife, Lynn, a 1975 ULM College of Business graduate, co-chaired the Bon Aire capital project at the university. Their vision and financial encouragement will greatly impact current and future generations of faculty, staff, and students. The Louisiana Board of Regents Sponsored Program provided \$20,000 in matching funds.





### Louis J. St. Amant Endowed Professorship in Rehabilitative Sciences

In 2022, St. Amant was recognized as a Warhawk Ambassador, and in 2023, to honor Coach Lou's lifetime of service, ULM named its baseball playing surface "Lou St. Amant Field," lovingly referred to as "The Lou." In 2024, St. Amant was recognized as the newest Hall of Distinction honoree, which is presented to an

individual, couple, company, or foundation that has honored ULM through an exceptional lifetime of distinction and/or exemplary service to, support for, or promotion of the University. 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 an ambassador to the community. He established the Louis J. St. Amant Endowed Professorship in Rehabilitative Sciences, which will be matched by the Louisiana Board of Regents Sponsored Program in 2025.

### Dr. Paul Karlowitz Endowed Internship Fund for Drone Technology

The family of Samuel Davidson has established the Dr. Paul Karlowitz Internship Fund in honor and memory of Professor Paul Karlowitz, former chair of the ULM Aviation Department. In addition to his role as chair, Karlowitz served as an associate professor and director of the ULM Precision Agriculture and Unmanned Aircraft Systems (UAS) Research Center.

A proud alumnus of Northeast Louisiana



University (now ULM), he earned a Bachelor of Science in Physics and Mathematics and a Master of Science in Aviation from Central Missouri State University. Over the course of more than two decades, Karlowitz made significant contributions to the University, playing a pivotal role in the creation of the Unmanned Aircraft Systems Management (UASM) program, which evolved from the Aviation program, and championing the transformative potential of UAS technology. With 46 years of experience as a professional

aviator—including 20 years as a U.S. Air Force pilot—Karlowitz brought unparalleled expertise and visionary leadership to his work at ULM.

The Dr. Paul Karlowitz Internship Fund supports UASM students in their final year by providing opportunities to participate in drone internships, offering experiences that are both professionally transformative and life-changing.

### R. D. Farr Independent Insurance Agents of Ouachita First Generation Endowed Scholarship

The R.D. Farr First Generation Scholarship, established through the University of Louisiana Monroe Foundation in honor of R.D. Farr, is designed to increase college access and success for low-income, first-generation students; enhance the University's efforts to provide need-based aid to undergraduates; assist deserving students pursuing a degree in risk management and insurance; and create additional opportunities for benefactors to support the University of Louisiana Monroe. The Louisiana Board of Regents Sponsored Program provided \$20,000 in matching funds.



### Deanie Baker Endowed Professorship of Distinction

Deanie Baker was a successful businesswoman and beloved friend who spent her life in service to others. From her real estate company to the legendary ULM Night of Champions parties, Deanie approached everything she did with passion, charisma, and flair. She was

deeply devoted to her family, her business, and her community. In honor of her enduring commitment to her community and passion for real estate, her family has established the Deanie Baker Endowed Professorship of Distinction in the College of Business and Social Sciences at the University of Louisiana Monroe. This professorship will ensure that generations of students are led and educated by world-class faculty. The earnings from this endowment will support faculty excellence in a variety of ways, including the recruitment and retention of outstanding faculty, enhancing research competitiveness, and expanding research opportunities. The Louisiana Board of Regents Sponsored Program provided \$20,000 in matching funds.

### William F. Sherman First Generation Endowed Scholarship

Established by his family, the William F. Sherman First-Generation Scholarship honors a man who strongly believed that education and community engagement were key to the

advancement of Black people in the United States. As one of the founding members of the Monroe chapter of the NAACP in the 1930s, Mr. Sherman used his role as a civic leader to fight voter suppression by encouraging Black voter registration in Ouachita Parish. He was also a devout family man, deeply involved in the lives of his children, grandchildren, and community. This scholarship provides need-based aid to low-income, first-generation, undergraduate African-American students pursuing a degree at the University of Louisiana Monroe. The Louisiana Board of Regents Sponsored Program provided \$20,000 in matching funds.

### Thomas H. and Mayme P. Scott Superior Graduate Student Scholarship in Physical Therapy

A longtime benefactor of ULM, the Thomas & Mayme Scott Foundation was created in 1961 to establish a perpetual fund enabling the family to give back to the communities that played a vital role in their lives. Over the years,



the Thomas & Mayme Scott Foundation has been instrumental in many ULM endeavors, including establishing several endowed scholarships and professorships, refurbishing and naming Scott Plaza, and funding critical initiatives such as ULM Athletics, KEDM, the University Residences project, and the Top Hawks program. The recently established ULM Doctor of Physical Therapy program develops diverse, high-functioning practitioners and leaders who partner with community members to create meaningful and sustainable change, with a special emphasis on rural and underserved



communities. The Thomas & Mayme Scott Superior Graduate Scholarship in Physical Therapy was the first scholarship dedicated to this much-needed program and was created in hopes of increasing the number of physical therapists regionally. The Louisiana Board of Regents Sponsored Program provided \$20,000 in matching funds.



### Charles R. McDonald Stadium Club

During his more than 20 years at ULM, Dr. Charles R. McDonald served as Director of

Counseling, Placement, and Testing, as well as Director of Financial Aid and Scholarships, where he worked tirelessly to ensure students had the resources they needed to succeed. By 1991, Dr. McDonald had completed 30 years of service in the field of education. In recognition of his service to the university, ULM honored him by renaming the university's Financial Aid Suite the "Dr. Charles R. McDonald Office of Financial Aid." In 2024, benefactors further honored Dr. McDonald by naming the baseball stadium's premium seating area the Charles R. McDonald Stadium Club.

## LONG-TERM BENEFACITOR HIGHLIGHTS

### Regions Bank

We are grateful to our community partner, Regions Bank, for supporting ULM's Educators Rising program through a \$100,000 five-year grant. Regions has long been a financial ally of ULM, contributing hundreds of thousands of dollars since the 1980s in support of critical initiatives such as the President's Top Hawks



program, campus housing and residences, athletics, CompeteLA, and now, Educators Rising.

The "EdRising" program addresses our state's certified teacher shortage by building a strong pipeline of dedicated, qualified educators

ready to serve where they are needed most. A national initiative, the program supports future teachers by providing scholarships, resources, and mentoring. The generous donation from Regions helps fund these crucial needs.



ULM Foundation President  
**CHARLES JACKSON**

## President's Message

For more than 60 years, the University of Louisiana Monroe Foundation has executed its mission to assist and support the University for whom we are named.

ULM will soon have its 10th President. The University is facing profound financial pressures and many challenges in the days ahead. But the ULM Foundation will continue on the same mission we've had for 60 years, working alongside the University and its President to meet needs and change lives.

We exist to accept and manage gifts on behalf of the university: direct gifts of property and financial assets, as well as gifts that establish endowed scholarships, fund special projects, and support individual colleges, departments, and professors within the ULM family. While the Foundation serves as a custodian and investment manager, we can't do *any* of that without *you*.

Every day, our advancement officers are involved with groups and individuals with the potential and interest to help ULM. In the course of building those relationships, we explore support and assistance for student scholarships, opportunities for faculty support and development, university athletics, and

improvements to the facilities and resources on campus.

However, raising money is simply the means to an end. We're in the business of helping ULM change lives and improve the educational status of our community. This past year, our endowed scholarships distributed financial aid to students in excess of \$1.237 million to cover tuition and expenses. The tuition paid by those scholarships covered operating costs at ULM that weren't covered by support from the State of Louisiana.

In partnership with the Louisiana Quality Education Support Fund, our Endowed Funds for Chairs and Professorships provided \$2.172 million to support funding for outstanding instruction, research, and departmental needs. The ULM Warhawk Advancement Fund, money designated from the Foundation's unrestricted general funds several years ago as a "rapid response" pool to ensure funds are available for both lending and expenditure to take advantage of the numerous opportunities that pop up regularly and are outside of normal planning, committed \$743,000 in support of applications for state and federal matching funds, worthy departmental needs, and loans to advance

projects until pledged funds are received.

ULM's needs are as varied as the academic programs taught and the faculty and students who comprise our educational community. And now, more than ever, the need for ongoing operational support funds at the University is critical. Collectively, each gift is a game changer. Cash, real property, life insurance policies, qualified charitable gifts from Individual Retirement Accounts, appreciated stock, and estate gifts may be designated for a donor-specified purpose, naming, or general operational support as a one-time gift or recurring for multiple years. Truly, if you have a desire to help ULM or invest in our region's future workforce, I can assure you: your gift will make a difference.

We would love to hear from you. Thank you for your love of ULM, and for your generosity and support for the ULM Foundation and our community.

Sincerely,

A handwritten signature in red ink that reads "Charles Jackson". The signature is stylized, with the first name "Charles" and last name "Jackson" clearly visible, followed by a flourish.

Charles Jackson



## ULM Foundation Board of Directors



Past President  
**JOHN JONES**



Secretary-Treasurer  
**ALBERTA GREEN**



Vice President  
**TERI FONTENOT**

ASH AULDS  
TONI BACON  
ANDREW BARBER  
DENNIS BLUNT  
LEANN BOYD  
GLEN CORBIN  
BART DORNIER

ALLISON FRANZEN-COMACHO  
STEPHEN FUTRELL  
FLORENCETTA GIBSON  
ISAAC HENDERSON  
SUSAN HOFFMANN  
SABRINA HOGAN  
LINDA HOLYFIELD

JOHN JACKSON  
JOE JACOBS  
TAYLOR JAMISON  
MEL KNOTTS  
ROBBIE LABORDE  
JEFFREY LAUDENHEIMER  
LESA LAWRENCE

ANNE LOCKHART  
ANGELA MCCRAY  
JAMES MOORE, III  
MARK NEAL  
KURT OESTRICHER  
TIMOTHY D QUINN  
MATT SANDERSON

KEVIN SMITH  
JAMES STEPHENS  
DERON TALLEY  
CHRIS WINDHAM

## Financials

	TOTAL ASSETS	TOTAL INVESTMENTS	RETURNS LEQSF / ENDOWMENTS
<b>2024</b>	<b>\$109.5 M</b>	<b>\$103.1 M</b>	<b>12.50% / 12.86%</b>
<b>2023</b>	\$98.2 M	\$89.9 M	16.20% / 16.83%
<b>2022</b>	\$83.0 M	\$75.3 M	-12.97% / -13.48%
<b>2021</b>	\$95.8 M	\$88.3 M	12.19% / 14.75%
<b>2020</b>	\$84.5 M	\$76.8 M	11.91% / 12.46%
<b>2019</b>	\$77.6 M	\$67.5 M	18.90% / 21.30%
<b>2018</b>	\$65.8 M	\$55.7 M	-2.00% / -2.70%





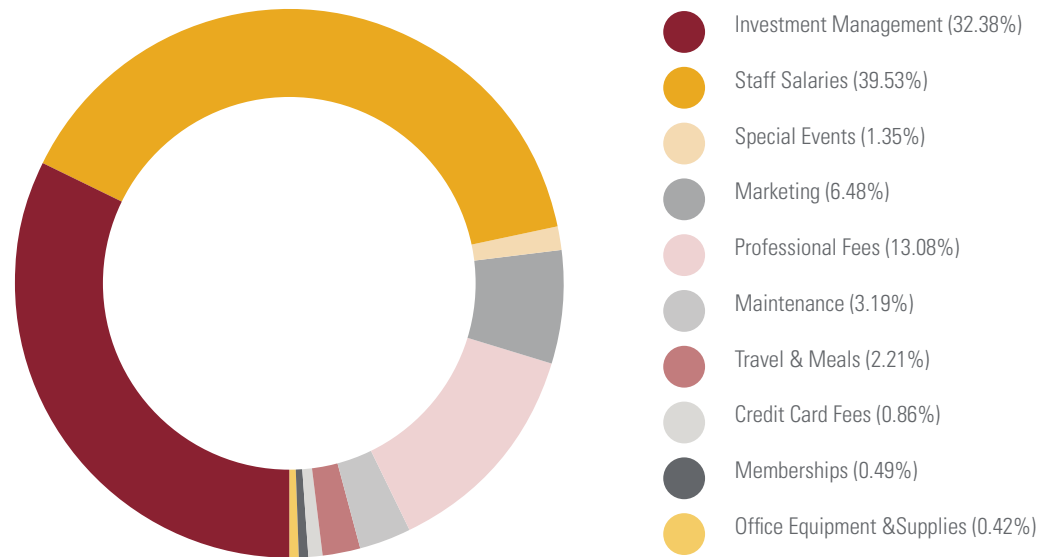




Foundation

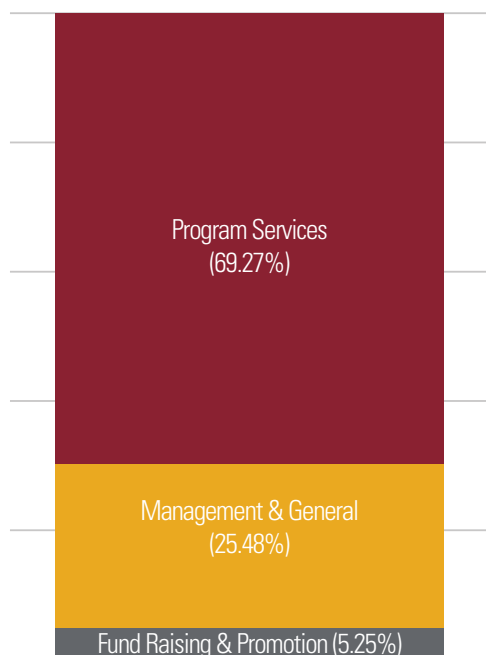
## Allocation of Expenses

## Operational Spending Summary





## Expenses in Program, Fundraising & Administrative Categories



**In 2024,  
the ULM  
Foundation  
Funded**

**\$1.237M**  
SCHOLARSHIP AWARDS

**\$2.173M**  
FACULTY SUPPORT



Foundation

## 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](http://ulm.edu/give).

### 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](mailto: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.





## Foundation

# What to Expect in the Future & Beyond

## Campus Master Plan

For more information, check out [ulm.edu/president/progress/facility.html](http://ulm.edu/president/progress/facility.html).

### NEW PROGRAMS

PhD – Family Systems

PhD – Pharmacology

Master of Arts in Strategic Communication

Bachelor of Science Occupational Therapy

Articulation Agreement with Starr Homeplace

Articulation with Chennault Aviation Museum

Memorandum of Understanding with Christ University (India)

Medical Laboratory Science Partnership with Delta Community College

High School Business Academy

Education Partnership Agreement with the U.S. Army Engineer Research and Development Center

### NEW CONSTRUCTION

Renovation of Sugar Hall

Construction Management Indoor Lab

Emily Williamson Laboratory School

Softball Complex Outfield Seating and Entryways

Louisiana State Mesonet Network Project managed by ULM Atmospheric Science Program









# Foundation

A member of the UL System • AA/EOE

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[ulm.edu/foundation](http://ulm.edu/foundation)

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