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2022 Annual Report

Southwestern Oklahoma State University

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2022 Donor Impact Report



Southwestern Oklahoma State University
Foundation, Inc.



From the Executive Director

Dear alumni, emeriti, & friends of Southwestern Oklahoma State University (SWOSU),

Thank you so very much for your continued interest in and involvement with SWOSU. We are a better institution because of your care and concern.

The Fiscal Year (FY) 2022 Annual Report is a glimpse of the activities of the SWOSU Foundation, Inc.—how we endeavor, day-in, day-out, to align your philanthropic vision with the mission, needs, and priorities of SWOSU.

2022 saw SWOSU's charitable donors and volunteers give generously of their resources and their time to advance student learning, faculty development, and program excellence. New endowments were created to sustain growing academic departments in the near-term and planned gifts were formalized that will enhance our institution's efforts in the future. Funds were raised to benefit our Athletic teams and to make needed facility improvements. Importantly, 2022 saw record-breaking levels of financial assistance paid to SWOSU by the foundation.

We bid “thank you and farewell” to six departing members of the foundation's governing board in 2022 whose combined service to their alma mater exceeds sixty-seven years! George Cohlmya ('74), Brice Harris ('70), Dianne Hunter ('86 & '90), Debbie Shepherd ('80), Nelson Sims ('71), and Judy Wilkes ('76) left the Board of Trustees due to term limitations, but they leave the foundation in a strong position. We are deeply grateful to these outstanding SWOSU alumni for their service and dedication.

It remains our highest honor to be of service to the Bulldog community and to work every day to keep SWOSU standing firmly on the Hilltop.

In SWOSU,

Garrett King, M. Ed.

Executive Director

'08 & '18

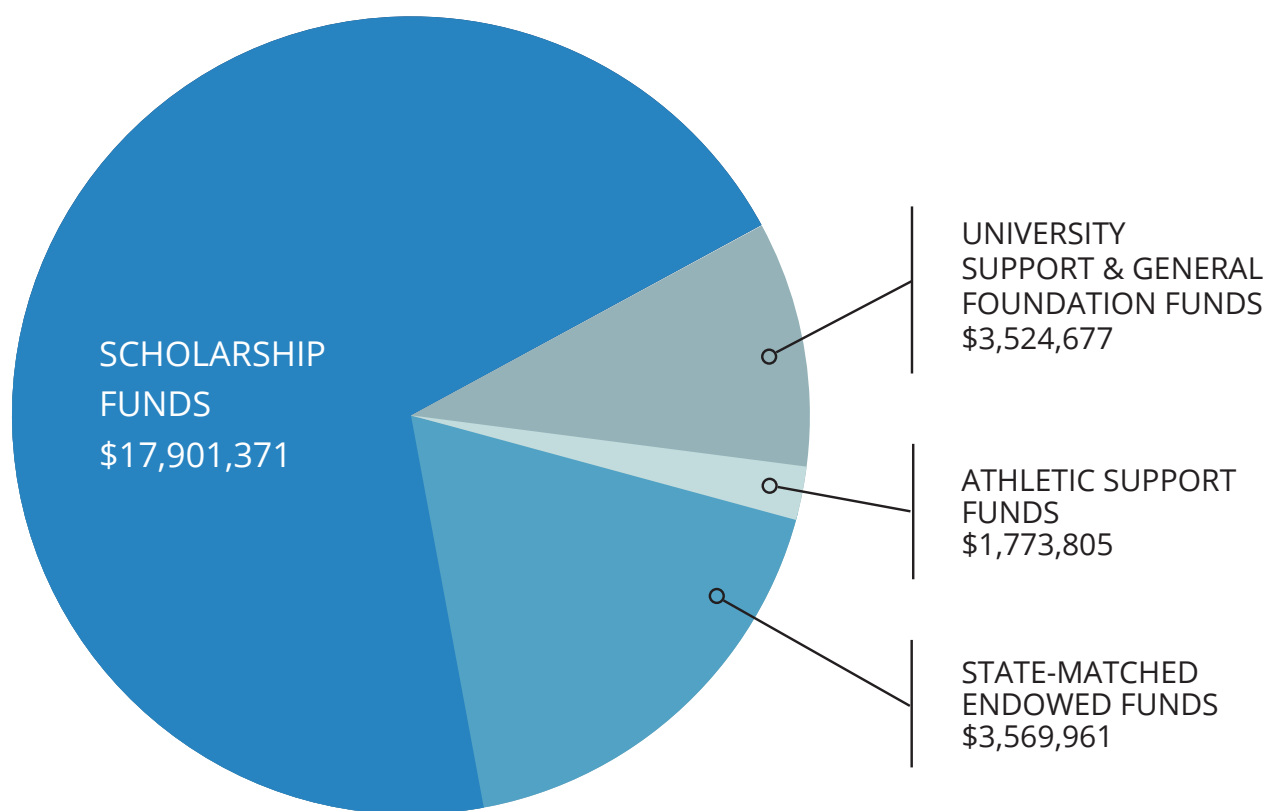


SWOSU™ Foundation

2022 BY THE NUMBERS

SWOSU FOUNDATION, INC. ASSETS AS OF 12/31/22 - CATEGORICAL

| | |
|---|--------------|
| Scholarship Funds | \$17,901,371 |
| University Support & General Foundation Funds | \$3,524,677 |
| Athletic Support Funds | \$1,773,805 |
| State-Matched Endowed Funds | \$3,569,961 |
| Beneficial Interest in Perpetual Trust | \$1,632,324 |



SWOSU FOUNDATION, INC.

12/31/2022

| | |
|-------------------|--------------|
| Net Assets | \$27,847,311 |
| Total Liabilities | \$186,529 |

SWOSU™ Foundation

2022 BY THE NUMBERS (cont.)



1,344

Donors Like You



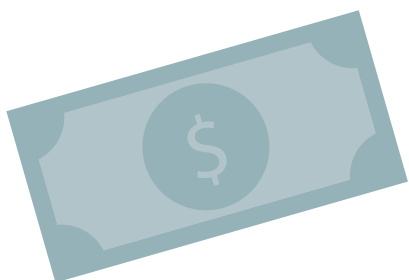
3,093

Gifts to SWOSU Students,
Faculty & Programs



\$4,086,813

in Philanthropic Contributions
& Commitments



\$16.00

raised for every \$1.00 spent

**There were 644 new
donors in 2022:**



532

Alumni



112

Non-Alumni

Madge Lenz Jordan Scholarship

ONE OF MANY AWARDED ANNUALLY BY SWOSU FOUNDATION, INC.

The Madge Lenz Jordan Scholarship Fund was established in 2016 by Jordan's daughter, Marilyn Doty of Auburn (WA) in honor of her mother. Doty is a 1966 SWOSU Chemistry alumna. The Jordan Scholarship benefits SWOSU students studying in the Departments of Education, Biological Sciences, Chemistry and Physics, and Social Sciences.

The Madge Lenz Jordan Memorial Scholarship Fund is one of many stewarded by the SWOSU Foundation, Inc. Since 2016, the fund has provided \$134,840.21 to SWOSU students.

Four students- Alexa Benedict, Emma Bollinger, Cailby Perez, and Hannah Wolff were named Madge Lenz Jordan Scholars for the 2022-2023 Academic Year at Southwestern Oklahoma State University (SWOSU). All four scholarship winners hail from Oklahoma.

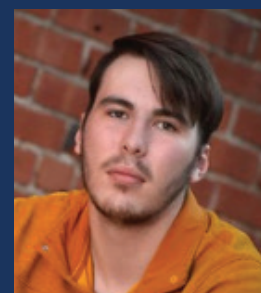
Benedict is from Burns Flat. She is a fall 2022 SWOSU graduate with a degree in Biomedical Sciences. Bollinger is a senior majoring in Mathematics and Engineering Physics from Stillwater. Perez, from Cheyenne, is a freshman Political Science major. Wolff is a graduate student pursuing a master's degree in Psychometry and School Psychology. She is from Weatherford.



Alexa Benedict



Emma Bollinger



Caliby Perez



Hannah Wolff



252 Active
Scholarship Funds

\$1,105,512

in FY '22 Scholarship
Awards



Scholarships awarded over the last 5 years have increased by \$628,080.02 since 2017.

That's a 132% increase.

Bulldog Angels Fund

The Bulldog Angels Fund was established in 2014 by Bill, Deborah, and Blake Howell to benefit SWOSU students in times of crisis. It is a vital resource when all other options for assistance are exhausted or unavailable. The Bulldog Angels Fund helps students with extreme financial pressures to stay enrolled in classes and on campus.

Bulldog Angels Program Impact:



55

Students assisted in 2022



\$53,794

Total assistance
provided in 2022



\$219,912

Total amount of assistance
provided since 2014



Steve Price Makes Record-Setting Gift to SWOSU™ Athletics

The fall of 2022 became one for the Southwestern Oklahoma State University (SWOSU) Athletics record books when 1983 SWOSU graduate Steve Price of Marble Falls, Texas made the single largest charitable gift ever to a SWOSU Athletic Program. The major charitable gift benefits the SWOSU Football Endowment which exists to support SWOSU's efforts to raise the Football Program to higher levels of excellence and quality.

Price was named to the SWOSU Athletics Hall of Fame in 2011 and, in 2022, he received SWOSU's highest honor: induction into the SWOSU Distinguished Alumni Hall of Fame.

"Steve's gift to the football program will make an incredible impact on our football athletes and program," said SWOSU Athletic Director Todd Helton. "I can't thank him enough for giving back to his alma mater."

Following his undergraduate years at SWOSU where he was a standout member of the SWOSU Football Team, Price served as executive vice president and chief human resources officer (CHRO) at Dell, Inc. from 2010 until his retirement in 2021 where

he led both human resources and global facilities. As CHRO, Price was responsible for setting the overall HR strategy and solving the biggest culture, leadership, talent and performance challenges of Dell and Dell EMC.

"SWOSU stands firmly on the Hilltop today because of visionary philanthropic investors like Steve and Stacey Price," said SWOSU President Dr. Diana "Diane" Lovell. "We are truly grateful for this generous, transformative gift."

Price joined Dell in 1997 and served in many key leadership roles throughout the HR organization, including vice president of operations, global talent management, and vice president for the global consumer business, Americas, Europe, Middle East and Africa. Prior to joining Dell, Steve spent 13 years with SC Johnson Wax in Racine, Wisconsin. Having started his career there in sales, he later moved into HR where he held a variety of senior positions.

Price holds a bachelor's degree in business from SWOSU and an Master of Business Administration from the University of Central Oklahoma.

Steve Price



SWOSU™ Foundation, Inc.

2022-2023 BOARD OF TRUSTEES

OFFICERS

CHAIR – Bryan Evans

CHAIR-ELECT – Philip Busey, Jr.

SECRETARY – R. Bruce Magill

TREASURER – James A. Keehn

EXECUTIVE COMMITTEE

Lori Boyd

Lori Harper

Jeff DeFehr

Michael Hart

Juan Garcia

TRUSTEES

Lori Boyd

Corporate Governance Committee Chair

Philip Busey, Jr.

Development Committee Chair

Jeff DeFehr

Property Committee Chair

Juan Garcia

Scholarships & Grants Committee Chair

Lori Harper

Audit Committee Chair

Michael Hart

Investment Committee Chair

James A. Keehn

Finance Committee Chair

Bryce Conway

Thomas D. Mapel

Mark Russell

David Ferrell

Melani Mouse

Cammi Valdez

MISSION

The Foundation was established in 1977 to promote philanthropy, award scholarships, and distribute funds to support the activities and programs of SWOSU.



SWOSU™
FOUNDATION



SWOSU™
ALUMNI ASSOCIATION



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www.SWOSUAlumni.com

This publication was not prepared at taxpayer expense. The financial records of the SWOSU Foundation, Inc. are under the oversight of the SWOSU Foundation Board of Trustees Finance Committee. The Foundation participates in annual audits. Those audits are available upon request.