

24 March, 2022

SWOSU Foundation, Inc., Board of Trustees Convenes, Holds Retreat



The SWOSU Foundation, Inc., Board of Trustees recently gathered at Quartz Mountain Resort Arts & Conference Center for a retreat to discuss strategic planning with SWOSU leaders.

The Board of Trustees of the Southwestern Oklahoma State University (SWOSU) Foundation, Inc. recently convened for a regularly scheduled business meeting and retreat.

The meeting was held in the Skyview Suite of the Pioneer Cellular Events Center at SWOSU's Weatherford location. Remote trustees participated in the meeting via zoom.

The trustees reviewed FY 2021 reports and metrics including a 122% increase in philanthropic revenues over FY 2020. Trustees reviewed data indicating that, in 2021, only \$0.01 out of every \$1.00 donated to the Foundation went to fundraising costs (the national average is \$0.20 according to the Association of Fundraising Professionals) and for every \$1 the Foundation invested in fundraising activities, \$37.16 was raised for SWOSU's benefit.

The trustees also noted that, in 2021, the Foundation investment portfolio earned a 15.35% return generating over \$3.9 million of investment earnings to support the current and future needs of SWOSU. Over the longer term, the five-year average return on the portfolio of 11.68% exceeded the benchmark return of 11.32%.

The trustees later held a full Board of Trustees retreat at Quartz Mountain Resort Arts & Conference Center to conduct strategic planning with SWOSU President Dr. Diana Lovell.

The Foundation's leaders include:

CHAIR – Bryan Evans, Edmond, SWOSU Class of 1998

1st VICE-CHAIR/CHAIR-DESIGNATE – Philip Busey, Jr., Oklahoma City, SWOSU Class of 2004, also chair of the Development Committee

2nd VICE-CHAIR – Michael Hart, Edmond, SWOSU Class of 2006, also chair of the Investment Committee

SECRETARY – Bruce Magill, Weatherford, SWOSU Class of 1970

TREASURER – James Keehn, Edmond, SWOSU Class of 1996, also chair of the Finance Committee

PAST CHAIR – George Cohlma, Oklahoma City, SWOSU Class of 1974

CHAIR OF THE GOVERNANCE COMMITTEE – Lori Baker Boyd, Yukon, SWOSU Class of 1997

CHAIR OF THE SCHOLARSHIPS & GRANTS COMMITTEE – Juan Garcia, Clinton, SWOSU Class of 2002

CHAIR OF THE AUDIT COMMITTEE – Judy Wilkes, Oklahoma City, SWOSU Class of 1976

CHAIR OF THE PROPERTY COMMITTEE – Debbie Shepherd, Weatherford, SWOSU Class of 1979

Additional seated trustees of the Foundation include:

Jeff DeFehr, Weatherford, SWOSU Class of 1990

David Ferrell, Amber, SWOSU Class of 1995

Bryce Conway, Edmond, SWOSU Class of 1995

Lori Harper, Gulfport (MS), SWOSU Class of 1993

Dianne Hunter, Edmond, SWOSU Classes of 1986 & 1990

Thomas Mapel, Tulsa, SWOSU Class of 2002

Melani Mouse, Oklahoma City, SWOSU Classes of 1985 & 1987

Mark Russell, Elk City, SWOSU Class of 1986

Nelson Sims, Key Largo (FL), SWOSU Class of 1971

Cammi Valdez, Tahlequah, SWOSU Class of 2008

An institutionally-related charitable entity, the SWOSU Foundation, Inc. was established in 1977 to promote philanthropy, award scholarships and distribute funds to support the activities and programs of SWOSU. Located on the Weatherford campus in the historic Burton House, the Foundation currently stewards nearly \$37 million in assets for the benefit of SWOSU.

The Foundation trustees serve as the overall governing and fiduciary body for the Foundation generally as well as for the Foundation's two subsidiaries, the SWOSU Alumni Association and the SWOSU Athletic Association.

For more information, contact the SWOSU Office of Institutional Advancement at 580-774-3267 or visit www.SWOSUFoundation.com.

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