



Clarion University Foundation, Inc.

2019-2020

ANNUAL REPORT



BOARD PRESIDENT'S MESSAGE



Last year, Clarion University Foundation, Inc., celebrated its 50th anniversary and anticipated rising to the challenges the next decades would present. But the year that followed could only be described as revolutionary. With the ongoing challenges of reduced funding, rising costs and lower enrollments came the totally unexpected COVID-19 virus.

While the “pause” button was pushed, halting many activities, the response of the University was rapid and laser focused. In carrying out our mission to enable the success of Clarion students, our focus was

aligned with the University's efforts in doing all things necessary to keep students and employees engaged and safe.

I marveled at the University's agility in responding to the needs of the students and the entire campus community. This was facilitated by the able leadership of Dr. Dale and her leadership team. We were grateful that we had such a role model for response.

Even before the March lockdown order, the Foundation was working with the University to streamline operations and manage costs more effectively. This resulted in the plan to have Fundraising and Alumni Engagement report directly to the University President. This plan was approved and scheduled for implementation in July 2020. This new structure, coupled with the retirement of Foundation CEO Michael Keefer and the promotion of Max Smith to Executive Director, provided for cost savings to be realized over future years.

In spite of the year's many challenges, our many accomplishments in the fiscal year include:

- Over 1,200 scholarships were awarded to 853 students, totaling \$1.4 million, a 10% increase over the prior year. The scholarships helped with housing and tuition, and with emergency needs stemming from the pandemic.

- Donor support grew to \$2.875 million, 37% greater than the prior period. The number of donors also increased almost 12%. Part of the donor support came from the Foundation in providing the seed money to establish the Center for Engaged Learning and Student Success which will provide faculty at Clarion and across the PASSHE system with tools to teach and deliver all modalities of academic programs.
- The endowment at fiscal year end was \$39.2 million, up slightly over the prior year. This represents one of the highest endowment balances among the PASSHE schools.
- Significant financial transactions and contracts were finalized related to campus housing. Refinancing the Hilltop Suites' bond issuance resulted in \$300,000 a year in savings. A Master Lease was enacted to transfer the management and liability of campus housing to the University, affording more flexibility in determining housing rates. This transaction enabled the Foundation to free up \$1.2 million in prior years' surpluses accrued from the properties, along with recouping \$800,000 paid previously by the Foundation on behalf of a housing location for capital projects. This money will flow back to support the University and fund housing scholarships over the next 15 years.

I thank Michael Keefer for helping to guide us through the ups and downs of this past year, and for his 18 years of committed and dedicated service to the Foundation and the campus community. I am forever grateful for my working relationship with Michael, and I look forward to many more years working with Max Smith and Dr. Dale as we forge a team effort with Clarion University.

As I anticipate another eventful year, I thank all of our donors, both past and present, who help CUF, Inc., keep its student-driven mission.

Sincerely,

A handwritten signature in black ink that reads "Jane K. France". The signature is written in a cursive, flowing style.

Jane France

FOUNDATION RESTRUCTURES

to better meet needs of university and students



Clarion University Foundation, Inc., has restructured its activities and staff as a means of better meeting the needs of Clarion University and its students.

The leadership of CUF and the university worked together on the plan to ensure a seamless transition. The restructuring shifted fundraising and alumni engagement back to the university, effective July 1, 2020.

The CUF Board of Directors unanimously approved the restructuring.

“This restructuring allows the foundation to focus on managing the nearly \$40 million endowment that helps to make a Clarion education affordable and a tremendous value,” said Jane K. France, president of the Board of Directors.

Clarion President Dale-Elizabeth Pehrsson agreed. “Last year alone, the foundation provided 796 students with \$1.3 million in scholarship support. This structure continues that investment in our students’ futures, while at the same time more closely aligning the work of the alumni engagement and development teams with the university.”

Administration, endowment investment oversight, and finance are the foundation’s focus.

Michael Keefer, CEO, retired from the foundation Dec. 31, 2019. It is now led by executive director Max Smith, former COO/CFO.

Scott Reinsel, former accountant for the foundation, was named controller.

“On behalf of the Clarion University Foundation, I’d like to thank Michael for his many years of service,” France said. “Michael personally secured major gifts to our endowment, oversaw new financing and construction of state-of-the-art student housing, and managed the day-to-day operations of the Foundation.”







THROUGH PLANNED GIVING, AHARRAHS' GIVING LEGACY CONTINUES

People who knew Ernie and Peggy Aharrah well would describe them as generous. People who didn't know them quite as well would describe them the same way. That's the kind of life they lived.

They were generous with their time – professionally, personally and civically.

Both were educators – members of the university's Class of 1949 – whose students benefited from their dedication. Ernie was a biology professor at Clarion University, and Peggy taught at several area elementary schools, retiring from Clarion Area School District. Both were active in the community, giving their time to Boy Scouts and Girl Scouts, their church, and various other organizations.

"They were both always very proud of the Clarion roots they had established," said Larry Jamison, Clarion University's director of planned giving and a personal friend of the couple.

"They both were always generous with the university, and Ernie served in various volunteer capacities."

Clarion University Foundation, Inc., recognized Ernie in 2015 with a resolution of appreciation for his 25 years of volunteerism. He served on multiple boards and was a guiding force for many foundation initiatives in its 50-year history. Together, he and Peggy were instrumental in the advancement of Clarion University.

They were also generous with their assets. They had a long history of financial support of Clarion University and Clarion University Foundation, Inc. In addition to contributing to other scholarship funds, the Aharrahs established the Cheri Aharrah Reid Memorial Scholarship in memory of their daughter.

The Aharrahs are gone now. Peggy passed away in January 2018, and Ernie died in November 2019. But they're still giving.

"They established their first scholarship years ago in memory of their late daughter, Cherie," Jamison said. "Their love of Clarion and their philanthropic desire led to the creation of three additional scholarships that are being funded through their estate."

The scholarships exemplify their love of education and their desire to serve Clarion students in perpetuity.

The scholarships stipulate that they are awarded to the "most deserving" student in four academic disciplines: theatre, elementary education, biology and business.

"I always used to call Ernie 'Mr. Clarion' since he showed so much pride in the university," Jamison said. "The Aharrahs epitomized the giving of time, talent and treasure."



GAMMAS FOCUS ON PHILANTHROPY



"The Gammas were made up of athletes and socially active members. They were serious about getting an education, but they also wanted to have a good time," said brother Wayne Norris of his fraternity, Alpha Gamma Phi.

It was Clarion University's first fraternity, established March 8, 1930.

They were always the most active fraternity on campus, according to Norris. Sometimes their penchant for good times collided with the early standards that the college espoused. The Gammas' charter was revoked in 1974.

Outwardly, that was the image of the Gammas, but there was more than met the eye.

"I was away from home and on my own for the first time in my life, so finding friends and creating a sense of belonging was essential for me," Norris said. "I am from a very small town, so attending Clarion was a huge change. Becoming a Gamma really helped me adapt to this change and made the transition much easier."

The Gammas' ability to create their own social activities taught Norris how to navigate the professional world.

"I am a firm believer in the total college experience. Being socially active then helped prepare most of us for the real world, since we also learned how to handle ourselves outside of academia," Norris said. "For me, this aspect of the college experience was one of the greatest benefits for my future. I gained a much better ability to interact with people and had an elevated level of confidence, especially in the business world."

Although the Gammas didn't formally exist after 1974, the brotherhood of its members remained strong. In 1999, former Gammas formed the Alpha Gamma Phi Alumni Association.

"The strong ties forged by the brothers while on campus proved to be very durable and seemed never to miss a beat with everyone renewing past relationships and creating new ones," Norris said. "All members were invited to join. We had members from the late 40s up to the last class of 1974."

Norris said one thing hasn't changed about the Gamma brotherhood: "We have a great time to this day."

The Gammas host the events, and anyone from Clarion is invited to attend. The events have evolved to being about more than just a good time, though.

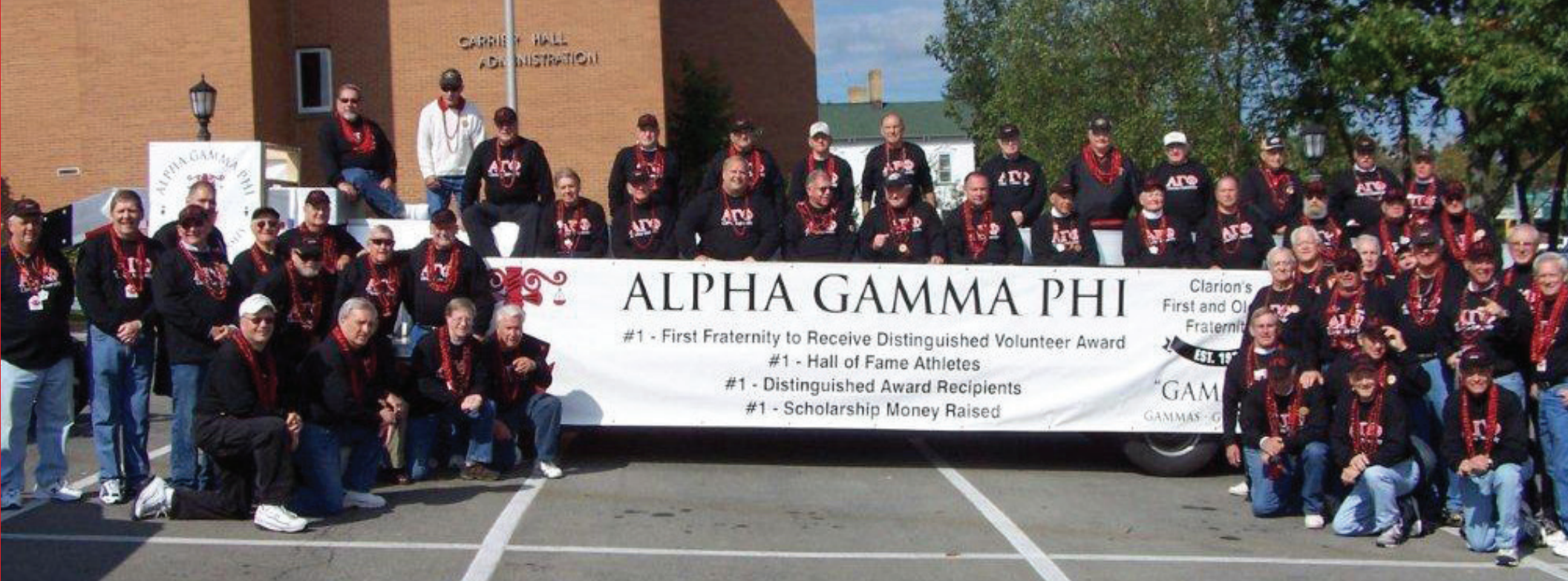
"We have a scholarship fund totaling almost \$355,000 and have awarded over 80 scholarships to Clarion athletes, male or female, that have met the requirements," Norris said. That fund is still growing.

"Since the original Gammas are a finite group, we started the 'Last Gamma Standing' drive to try to reach \$1 million before the last Gamma passes."

Norris said the group has incorporated as Alpha Gamma Phi, Inc., and has applied for 501(C)(3) nonprofit status. Incorporating will provide a structure that the new members can follow.

Members stay updated through a webpage maintained by brother **Larry Kuzma '64**, and through the Alpha Gamma Phi Alumni page on Facebook.

"The Gamma spirit was strong from 1930 to 1974, and it's still strong today," Norris said.





Golden Eagle GATEWAY



GOLDEN EAGLE GATEWAY BUILDS NETWORK OF CU ALUMNI

The Office of Alumni Engagement has launched Golden Eagle Gateway, a new platform aimed at connecting alumni with each other, with faculty and staff, and with students.

The overall purpose of the Graduway-based platform is networking, according to Ann Thompson, director of alumni engagement. The Golden Eagle Gateway had a soft launch in spring 2020, and since then, membership has grown to more than 250.

“Alumni can use Golden Eagle Gateway for any kind of networking, with the knowledge that other users are members of the Clarion University community,” Thompson said. “You can sign up in less than two minutes by registering with your LinkedIn or Facebook profile.

Simply go to clariongateway.com to register.”

Students are welcome to join, but first they must complete CU Professional – specialized training through which they learn professionalism and appropriate behavior as a mentee – through the university’s office of Career and Professional Development. Students can use the platform to develop career connections, seek internships or seek mentors.

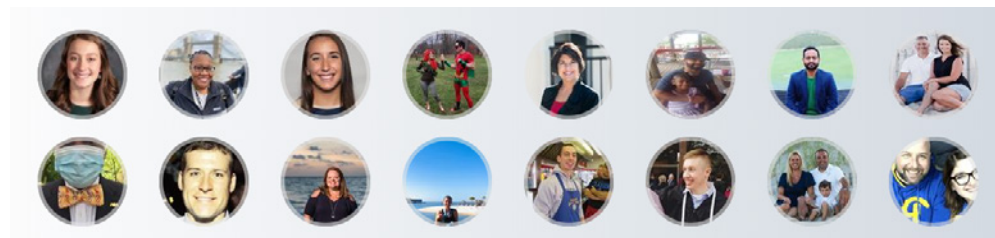
Thompson encourages alumni to register and create a profile. The profile will indicate if a user is willing to help in particular areas: I’m willing to be a career mentor, I’m willing to serve as regional contact in my area, I’m willing to help recruit students in my area. Alumni can offer to help, they can seek help in a particular area, or they can simply observe until an aspect of Golden Eagle Gateway piques their interest.

Users can create groups based on affinity – a class, a sport, a major, a Greek organization, etc. – and they can create events for other alumni to join. Thompson particularly hopes alumni will post content, whether professional, social or reminiscent of the user’s time as a student at Clarion.

Golden Eagle Gateway brings the Clarion University community together through:

- A running feed of alumni updates, interesting content, photos and conversations.
- A full opt-in directory of alumni and students, allowing members to connect with the Clarion University community, all over the world.
- A mentorship program, giving members the opportunity to be mentored by others or offer mentorship to fellow alumni/students.
- A job board with current opportunities, posted by alumni, students and strategic partners.
- Group conversations allowing members to engage at a more granular level with those with the same class, interests, careers, industries and locations.
- Events posted by alumni, students and Clarion University, inviting members to upcoming events, encouraging pop-up engagement, coffee meetings around the world, webinars hosted by subject matter experts within our networks, and other organic engagement opportunities created for and by members.

**TO REGISTER, PLEASE VISIT:
[CLARIONGATEWAY.COM](https://clariongateway.com)**



in appreciation of our **DONORS**

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Thank you!

This emergency fund money means so much to me, to my family! It's this kindness and generosity that put a little twinkle back into my days. Thank you so very much. I feel very fortunate to be a part of this university!

Sincerely,
Rebecca Franklin

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I want to thank you for the generous donation during these tough times. You don't even understand how much this means to me and my family. With my sister and I both being in college at the same time and both my parents being laid off, money isn't the easiest to come about right now.

Thank you very much,
Kendyl Switzer

I can't say how thankful I am to receive this money. The money I have received from this fund is going to help me a lot going through these hard times!

The fact that Clarion made this fund goes to show how much they truly care about their students.

Thanks again,
Hannah Schettler



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** Donor passed away in the year reported.*

During times like these, it is institutions and people like yourself that create considerate, easy and stress-free environments!

Sincerely,
Chelsea Lanigan

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I would like to thank you from the bottom of my heart for the \$250 that I was given through the Clarion Student Emergency Fund. It will be very helpful in paying my bills and purchasing items I need for studying this semester. This online learning platform that was converted to from brick and mortar classes has not been easy. Having these items will go a long way in making studying much easier.

I want to thank the Clarion University Foundation again and the Emergency Fund Donors that were very generous in their donations and time in the process.

Sincerely and heartfelt thanks,
Justin Longnecker



I would like to express my gratitude for your financial support through this tragic time in our nation. It is because of your generosity that I am able to buy essentials and food for my family. Words cannot express how thankful we are for your support and kindness. We will never forget who supported us during this tragic time in our lives. This financial support will make a difference for my family. Thank you so much for your generosity, again, and for all that you are doing. Your foundation is the best!

Sincerely,
Matissa Burnip and family

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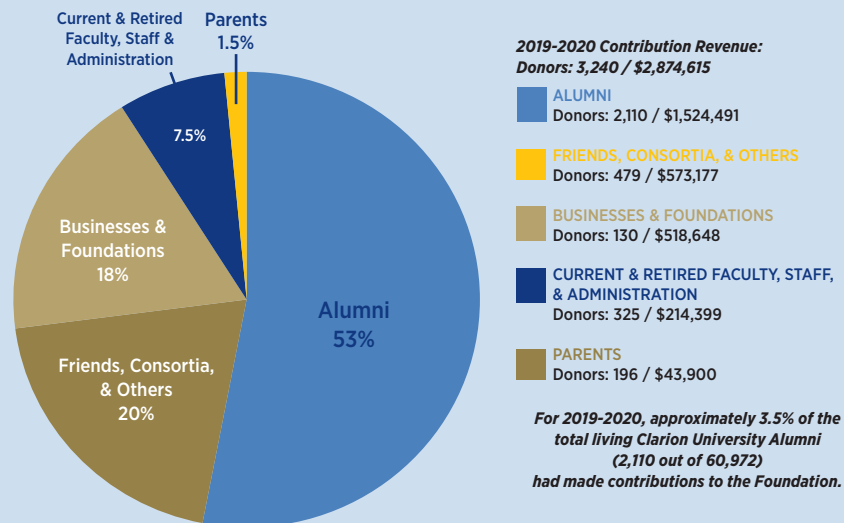
Thank you so much for the assistive donation during this time. The contributions have helped me finish out my last semester of college with a little less stress. Thanks to all of you, I was able to pay for and attend my HURST review for nursing school. This review is used to prepare students for the NCLEX that is needed in order to obtain a nursing license.

Sincerely,
Hanna Rigby

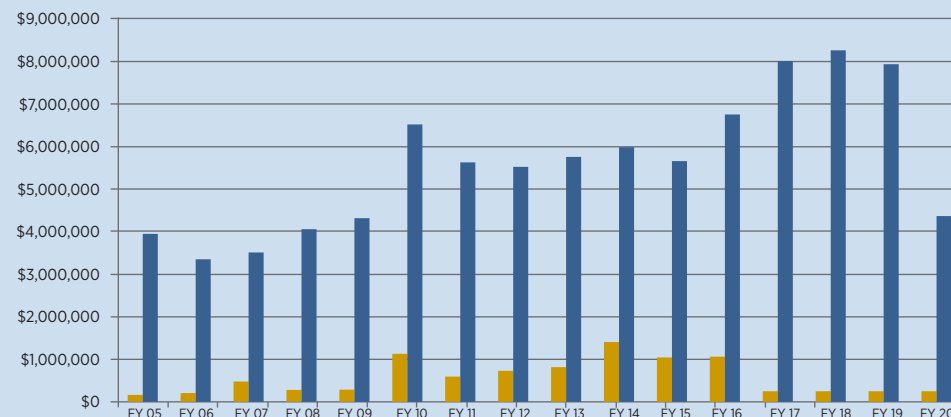
** Donor passed away in the year reported.*

The listing of names of our contributors is subject to error, both human and computer. If there is an error, please accept our apology and bring it to our attention.

FINANCIAL MATTERS



Foundation Support to Clarion University

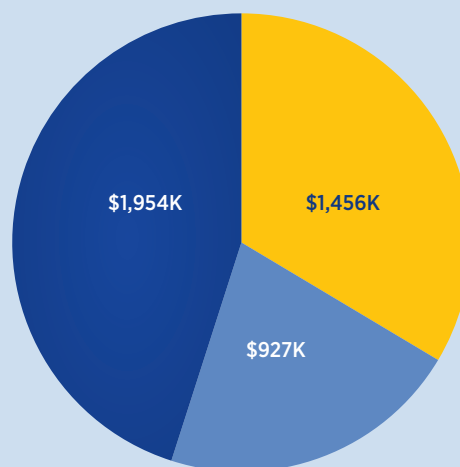


Over the last 16-year period, the University has received \$9.70 for every \$1 provided to Clarion University Foundation, Inc.

FY 20 Support By Category

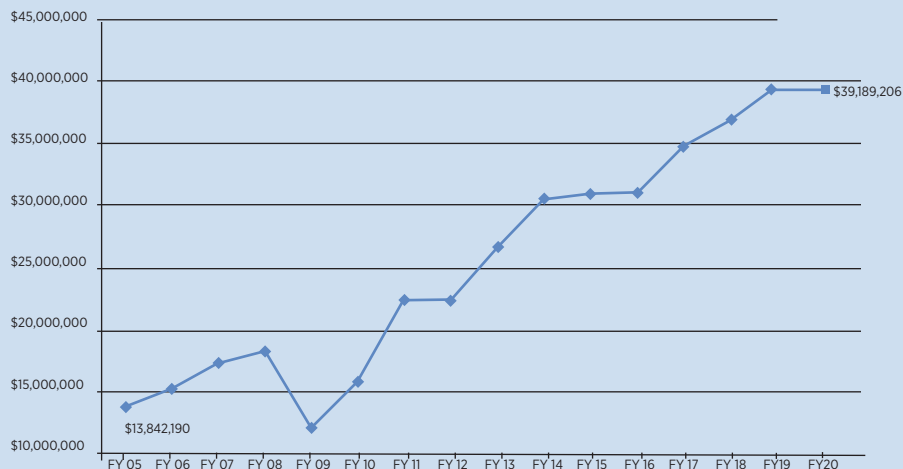
- Scholarships & Grants
- Campus Activities & Programs
- Operational & Support Services

Total = \$4,337,000



GROWING OUR ENDOWMENT

Endowment Balance from FY05 - FY20



CLARION UNIVERSITY FOUNDATION, INC. CONDENSED STATEMENTS OF FINANCIAL POSITION JUNE 30, 2020

ASSETS	JUNE 30, 2020	JUNE 30, 2019
Cash, Cash Equivalents and Other Current Assets	\$13,734,230	\$15,789,310
Investments	38,862,161	40,170,010
Other Long Term Assets	105,391,867	95,674,136
TOTAL ASSETS	\$157,988,258	\$151,633,456
LIABILITIES AND NET ASSETS		
Accounts Payable and Accrued Expenses	\$4,981,183	\$5,083,451
Debt Outstanding	95,755,155	98,813,182
<i>Total Liabilities</i>	<i>100,736,338</i>	<i>103,896,633</i>
Net Assets:		
Without Donor Restriction	20,459,372	10,842,939
With Donor Restriction	36,792,548	36,893,884
<i>Total Net Assets</i>	<i>57,251,920</i>	<i>47,736,823</i>
TOTAL LIABILITIES AND NET ASSETS	\$157,988,258	\$151,633,456

FROM THE EXECUTIVE DIRECTOR

Where do we go from here?

When I think about our foundation's fiscal year 2020, the word "transformative" comes to mind.

In my inaugural year as executive director, we restructured to enable the team to focus more precisely on the charge to support our university and our students in the best ways possible, no matter the current circumstances.

The restructuring shifted fundraising and alumni engagement to university oversight, allowing the foundation team to focus our financial expertise on growing the endowment, maximizing scholarship administration and program funding, and maintaining records in our database of alumni and friends. During a year in which dens, bedrooms and dining room tables were our offices, and "Zoom" became more than just a verb, our dedicated team continued this work for the singular purpose of serving students.

More important than our inconveniences, however, are the hurdles the pandemic has created for our students. While learning remotely, many students and their families are without income to meet their basic needs. Through the Student Emergency Fund and Fill the Nest food pantry initiatives, you – our alumni and friends – provide life-sustaining aid to students. Testimonials in this publication speak volumes on the impact of your generosity on their lives.

Many of these students are the same ones who benefit from your generosity in supporting scholarships. Their success paves the way for our future. On behalf of all of us engaged in this endeavor, we thank you for making the difference.

I am proud of and thankful for our faculty, staff, students and benefactors as we make our way forward, together. In closing, I must also acknowledge how grateful I am to Michael Keefer, who retired in 2019, for helping to mold our foundation into Clarion University's charitable lifeline.

With sincere gratitude and warmest wishes,



Max R. Smith

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DONATE, VOLUNTEER, SERVE, JOIN OUR TEAM...

Clarion University Foundation, Inc., wishes to thank Ms. Tina Horner, Clarion University communication manager, and Bryan Postlewait from PAGES for their guidance, writing, design and untiring editing, which made this publication possible.




Clarion University Foundation, Inc.

