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Annual Report 2012

Missouri Southern Foundation
Thank you!

Every gift to the Foundation is an investment in the future of our students.

What is the Foundation?

The Missouri Southern Foundation is a separate 501(c)(3) organization whose purpose is to foster, cooperate, and assist in the growth, development, and advancement of Missouri Southern State University. This is accomplished by working with individuals, corporations, and organizations who contribute resources to improve educational opportunities for students at MSSU. These contributions help in areas such as scholarships, facilities and improvements, and departmental support to name a few. The Foundation is governed by an independent board of directors.

Why have a Foundation?

State universities form foundations so that private gifts may be invested under more favorable guidelines than provided for under state statutes governing funds held by the university itself.

Why is the Foundation important?

Missouri Southern State University once was a state-funded institution, receiving more than 50 percent of its revenue from state appropriations. Today, MSSU is a state-assisted institution, receiving only 33 percent of its revenue from the state, and that number is decreasing. Gifts to the Foundation are an increasingly important component of MSSU’s resources in order to provide its students with the best educational opportunities possible.
Financial Report

Net Assets

- Unrestricted - $1,523,974
- Temporarily Restricted - $13,427,814
- Permanently Restricted - $15,677,022
Total Net Assets - $30,628,810

Revenue

- Contributions - $1,144,693
- Investment Income - $493,860
- Beneficial Interest in Trust Decrease - ($527,572)
Total Revenue - $1,110,981

Expenses

- Scholarships - $633,721
- Faculty & Department Support - $560,829
- Facilities Improvement - $249,404
- General University Support - $47,647
- Administration - $175,275
- Fundraising - $65,549
Total Expenses - $1,732,425

The audit of the financial statements for the year ending June 30, 2012 was conducted in accordance with generally accepted auditing standards and has been approved by the Budget and Audit Committee of the Missouri Southern Foundation Board.

Southern Annual Fund grew substantially, approaching $100,000

Pledges to the annual Phonathon grew from $46,542 in FY 2011 to $75,794 in FY 2012. A dedicated crew of 25 student callers reached more than 9,000 alumni and friends in a two-week span. The Phonathon continues to operate with current MSSU students calling directly from our campus in Joplin.

Additional donations from MSSU faculty and staff, campus boards, and area businesses pushed the numbers to $97,924.

The Southern Annual Fund supports urgent and strategic needs on the MSSU campus. Such needs include scholarships to students, awards to outstanding faculty and staff, improvements to facilities, and cultural activities that benefit the entire region. It builds on the 30-year tradition of the Phonathon at MSSU, keeping it as the central point while at the same time expanding efforts.

The Phonathon and the Southern Annual Fund provide an initial, personal contact for many donors. The key is building the relationship.

To that end, more than 500 people made their first donation to Missouri Southern through the Phonathon over the past two years.
Hundreds of MSSU students, faculty and staff were impacted on May 22, 2011 and for months after. We are so grateful to our family of alumni and friends who helped. Please accept our sincere thanks for all that you have done by supporting our MSSU family.

- The Missouri Southern family lost three individuals after the May 22 tornado: Dr. Jose Alvarez, a respected faculty member; Abraham “Abe” Khoury, a student who was role model to his friends and family; and Don Lansaw, who gave his life shielding his wife Bethany, a staff member. In honor of these three individuals Dr. and Mrs. Bruce Speck established the Alvarez-Khoury-Lansaw Memorial Scholarship.

- The Tornado Emergency Relief Fund distributed nearly $60,000 in grants to approximately 200 faculty, staff and students.

- The Foundation awarded two separate $1,000 tornado-based scholarships, provided by a private foundation, at the end of September 2011.

- Financial Aid distributed $15,000 in tornado relief funds provided by USA Funds to students at the end of September.

- Missouri Southern Athletics distributed $10,000 in tornado relief funds provided by the MIAA to tornado-impacted staff earlier this summer.

- MSSU Lions and Mizzou Tigers faced off on the basketball court to show their support for Joplin. The One State, One Spirit Classic raised more than $100,000 for Missus’s Tornado Relief Fund.

- Both the MSSU Lions women’s and men’s basketball faced off against Missouri State Bears for a fundraiser for the Tornado Relief Fund. The event raised nearly $50,000.

- Additional funds were used to create an endowment for scholarships to support tornado victims into the future and to serve as an enduring remembrance of the tragedy of the tornado while providing hope to future students.

**Donor Recognition**

The Foundation honors and recognizes its donors through two giving societies.

**SOUTHERN LANTERN SOCIETY** – This society recognizes individuals, corporations, foundations, and organizations that have contributed private resources to improve educational opportunities for students at Missouri Southern State University. Membership is granted to individuals whose cumulative giving is $5,000 or more and to corporations and organizations whose cumulative giving totals $10,000 or more.

**LEGACY CLUB** – The Legacy Club honors individuals who have chosen to make a deferred gift to the Missouri Southern Foundation. Deferred gifts are made through means including, but not limited to, wills, trusts, charitable gift annuities, life insurance policies, and retirement accounts.