

DEVELOPMENTS

a publication for faculty, staff and retirees of Michigan State University



THE SPARTAN SCHOLARSHIP CHALLENGE: KEEPING OPPORTUNITY ACCESSIBLE

Now, for a limited-time, the MSU community has been challenged to help MSU students in financial need through a new program designed to make the most of gifts to create new endowed scholarships.

The Spartan Scholarship Challenge, available only until December 31, 2010, maximizes donors' gifts through a \$1 match for every \$2 in newly created endowed scholarships. The special fundraising initiative leverages a \$7 million anonymous gift to Michigan State University that recently made national news (see news.msu.edu/story/6232), to generate \$21 million in needs-based financial assistance for undergraduate students. The match opportunity expires when the \$7 million made available through the anonymous gift has been exhausted or by Dec. 31, 2010, whichever comes first.

"We're excited about the opportunity provided by this anonymous gift," said MSU Provost Kim Wilcox. "The donor's generosity is inspiring. We hope it, in turn, inspires others to help the university expand support to deserving undergraduate students as they prepare for the future."

MSU President Lou Anna K. Simon recently announced the challenge which will significantly build MSU's endowment—the key to providing scholarship funds for students both now and in the future. For every two dollars a donor gives to



Scholarship recipient Shayla Thrash is a social science senior from Flint, Michigan.

the Spartan Scholarship Challenge to create a new endowed scholarship, one dollar will be designated from the anonymous gift.

Donors who make a commitment of \$20,000 or more will have the opportunity to create a permanent scholarship in their name or the name of someone they wish to honor. Typically, a minimum of \$30,000 is needed to begin a named endowment. The match will apply to gifts of up to a total of \$1 million per donor. Commitments to the challenge can be paid over a period of five years or less.

Unlike funds that are expendable, endowed funds have an enduring effect because the total amount of the gift is invested. Each year, only a portion of the invested income earned is spent while the remainder adds to principal growth and preservation.

"The steady stream of income generated from endowed funds provides the assurance the university needs to recruit and retain the best and brightest students and provide access to a world-class university education," said President Simon.

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LUCAS FATHER & SON ENDOW CANR SCHOLARSHIP

Richard Lucas (Social Science, '64) wanted to establish a scholarship in honor of his father, retired MSU Extension Professor Robert Lucas. Richard knew his dad would want the Department of Crop and Soil Sciences to benefit from the gift, as well as incoming students, with a preference for students from Starke County, Indiana, where his dad and mom had graduated from high school. The Robert "Bob" Lucas Endowed Scholarship was created with a pledge from Richard.

Richard explained, "Dad has worked so hard all his life. This endowment was established to recognize his work and to help people to look back on dad's professional work in Indiana, at Michigan State, in Florida, and in more than 59 countries he traveled to. His life has inspired me and my brothers, and I wanted to make sure his legacy stays with MSU forever."

Robert Lucas was so honored by the scholarship, that he made gifts himself of \$70,000 to the scholarship, fully funding the endowment before the 5-year pledge period ended. This has

enabled the Department of Crop and Soil Sciences to offer the scholarship to a student for the Fall 2009 semester. The first scholarship recipient is Lucas Costanza, a freshman majoring in Crop and Soil Sciences.

Robert reflected on what funding this scholarship means to him. "This endowment will help to keep my wife Norma and me associated with MSU forever," he said. "The Department of Crop and Soil Sciences and my past work in this department continue to impact so many families. I was raised on a family farm, I am one of 11 children and I know the struggles that students face as they think about a college education. Through this fund, many students who would not have dreamed of college will get an opportunity to attend college." He added, with a smile, "the first student who received this scholarship just happens to have a very good name – Lucas."

Robert's affiliation with MSU began with the doctoral program he completed in 1947. In 1951 he accepted a position as associate professor of soil science. He became a full professor in the MSU Extension in 1957. He specialized in the management of field and vegetable crops (onions, mint, celery, carrots, potatoes, and lettuce), especially those grown in organic soils.

Crop and Soil Sciences Chairperson Jim Kells has a deep appreciation for this gift. "Endowments such as the Lucas Endowment are very valuable to the Department of Crop and Soil Sciences," he stated. "These funds help us attract and retain outstanding students, including out-of-state students."

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Robert and Norma Lucas with their son Richard.

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SCHOLARSHIP CHALLENGE

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Student Shayla Thrash attends MSU thanks to the scholarships she receives. “Simply put, without receiving the help of scholarships, I would not be here. I come from a low income household and there would be no way for us to afford the costs associated with tuition, housing, books, etc. without the assistance,” she said. Now a senior studying social science, Shayla has had the opportunity to gain hands-on learning experience conducting research and presenting at conferences. She is currently in the process of applying to graduate school.

Upon fulfillment of the Spartan Scholarship Challenge, MSU will be able to offer an estimated

\$1 million in new financial aid each year on a permanent basis, including aid for women and minority students. During the 2007-08 academic year, MSU provided financial aid to 75 percent of its undergraduate students. Of this, \$16.3 million was the result of private giving to MSU.

For more information about the Spartan Scholarship Challenge, visit www.givingto.msu.edu/ssc, contact Director of Development for University Scholarships and Fellowships Jennifer Bertram at (517) 432-7332, or speak with the development officer in your college or unit.

CANR SCHOLARSHIP

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Our graduates are in high demand, and endowments help us meet this demand with well educated and highly capable graduates.”

Lucas Costanza, the first Lucas scholarship recipient, was the valedictorian at Berrien Springs High School. He considered attending other schools, but receiving scholarship support helped sway him to MSU. With a background in agriculture stemming from working on his family’s farm, he hopes his MSU degree will



Lucas Costanza is a Crop and Soil Sciences freshman and the first recipient of the Lucas Scholarship.

launch a career as a crop consultant or crop breeder. “This scholarship is one of the building blocks of my education and a big part of me being able to attend MSU,” he said. “Knowing all my hard work in high school paid off and that there are people willing to support me; that is definitely a big motivator.”

The Lucas Endowment will benefit future Spartans in perpetuity, since the principal is preserved and only the interest income will be spent each year. Other members of the Lucas family and their friends also are contributing to the endowment. It is clear that this father and son have created something special that can benefit students and the university today and for generations to come.

For more information about making a gift to the College of Agriculture and Natural Resources, contact Interim Senior Director of Development Jackson Kaguri at (517) 355-0284.

HOW THE SPARTAN SCHOLARSHIP CHALLENGE WORKS

- The Spartan Scholarship Challenge offers a \$1 match for every \$2 given to newly created endowed scholarships.
- Gifts of \$20,000 to \$1 million will be matched and used to create new endowment funds in the donor’s name or in honor of a loved one. A preference for scholarship recipients to major in a specific academic area or to be from a certain geographical area can also be expressed.
- Gifts below \$20,000 can be directed to the university-wide Spartan Scholarship Challenge endowment fund.
- The match opportunity expires when the \$7 million made available through previous gifts has been exhausted or by Dec. 31, 2010, whichever comes first.
- The initial gift payment must be made by Dec. 31, 2010 with final payment by Dec. 31, 2014.
- Income earned from each named endowment will provide a permanent source of scholarship funds. For example, each newly created and endowed scholarship at the \$30,000 level will provide more than \$1000 in annual financial assistance to an MSU student in financial need, every year into the future.
- If academic performance standards are met, each student recipient can count on having the scholarship throughout his or her MSU career.

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To remember MSU as a charitable beneficiary in your will, personal trust or retirement plan, it is important to do so accurately. The correct reference is: Michigan State University, East Lansing, Michigan and the federal tax identification number 38-6005984. To explore how you might remember MSU, please contact the Office of Gift Planning at (800) 432-4678 or (517) 884-1000. If your estate/retirement plan includes MSU as a beneficiary, we encourage you to contact us to accurately record your intent and include you in the appropriate donor recognition group.

SCHOLARSHIPS BUILD OPPORTUNITY

MSU Student Ilycia Shaw knows firsthand about the difference receiving a scholarship can make.

The youngest of four girls, all of her older sisters were college graduates, thanks to financial assistance from their mother. However, during Ilycia’s freshman year of high school, as she and her mother began to prepare for her future, an illness forced her mother into early retirement. Ilycia faced some tough decisions about how to prepare for her education.

“A scholarship was the only option,” she said. “I began my research and found that MSU has some of the best scholarship programs available for hard-working and determined students such as me.”

Ilycia is taking full advantage of the opportunity afforded to her. She is now a proud Spartan sophomore with a high grade point average, majoring in hospitality business.

Even though she is a full-time student, Ilycia works on campus as well. Because she understands the impact that giving to MSU can have, she chose to work in the MSU Telemarketing Program, helping to secure contributions in support of Michigan State. She enjoys playing a part in building the financial assistance students need to succeed and has risen



Spartan Ilycia Shaw attends MSU thanks in large part to the scholarships she receives. She is a sophomore studying Hospitality Business and her hometown is Detroit, Michigan.

through the ranks from a caller to a team supervisor, gaining valuable communications skills at the same time.

Interestingly, all three of Ilycia’s sisters are alumnae of the University of Michigan. But, there can be no doubt where Ilycia’s loyalties lie. “I am so happy I came to MSU,” she said. “The opportunities for me here are endless.”

REDDY ADVOCACY ENDOWMENT SUPPORTS MSU SAFE PLACE

As a volunteer at MSU Safe Place, MSU retiree Sashi Reddy was impressed with not only the expertise but also the kindness of the program's staff in helping victims of domestic violence. Sashi and her husband, an MSU professor, recently decided to establish a new endowment to support the program's advocacy work. The Sasikala and C.A. Reddy Advocacy Endowment for Safe Place provides critical resources to directly ensure safety and welfare for victims of domestic violence in need of help.

Sashi was so inspired by the dedication of Safe Place Volunteer & Advocacy Coordinator Alyssa M. Baumann, the Reddys chose to focus on the advocacy mission of MSU Safe Place. The advocacy program assists clients in finding appropriate resources for their legal, educational, temporary housing, financial or emotional needs. "I am extremely impressed with the caring service Safe Place Director Holly Rosen and her staff provide to those who are in need of support and help to get back on track with their lives," Sashi said. "They always go that extra mile to help their clients."

The first and only domestic violence shelter and support program on a college campus in the U.S., MSU Safe Place was founded over fifteen years ago through the community organizing efforts of Joanne McPherson, MSU's first lady from 1993-2004. The program offers shelter to approximately 65-90 adults and children each year. In addition, MSU Safe Place provides training and education to over 15,000 people on campus and in the greater Lansing community, seeking to end domestic

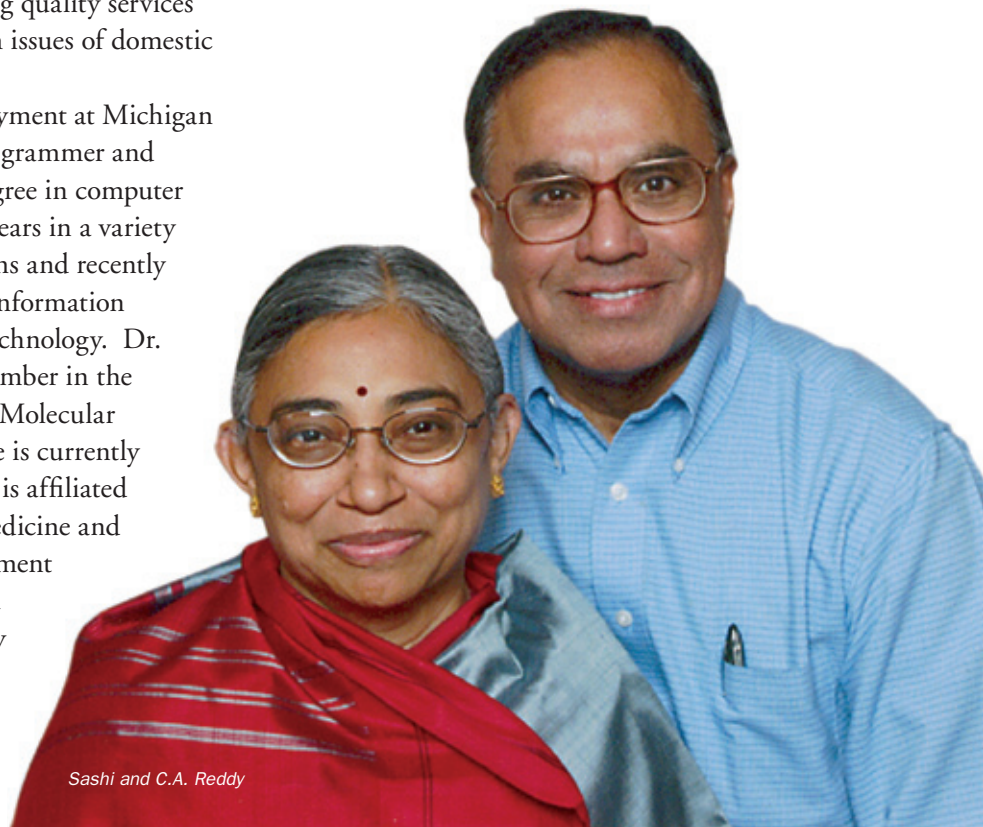
violence through public awareness and community education. All services are confidential and, thanks to the generosity of donors like the Reddys, offered free-of-charge.

Lee June, vice president for Student Affairs and Services, expressed his deepest thanks to the Reddys for their endowment. "Safe Place continues to be a unique program within the nation, thanks to the pioneering and visionary efforts of Holly Rosen, the director, and Joanne McPherson, former first lady of Michigan State University. This endowment is much appreciated and will allow Safe Place to continue to be on the cutting edge of providing quality services for those who need assistance with issues of domestic violence."

Sashi Reddy began her employment at Michigan State University as a computer programmer and subsequently earned a master's degree in computer science. She served MSU for 30 years in a variety of information technology positions and recently retired as the director of College Information Systems at Health Information Technology. Dr. C.A. Reddy has been a faculty member in the Department of Microbiology and Molecular Genetics at MSU for 37 years. He is currently a professor in the department and is affiliated with the College of Veterinary Medicine and the Michigan Agricultural Experiment Station. He enjoys his teaching in CVM and is recognized nationally and internationally for his research contributions on lignin biodegradation.

The Reddys are members of MSU's Beaumont Tower Society. In addition to their endowment to benefit MSU Safe Place, they have supported the colleges of Veterinary Medicine and Osteopathic Medicine, WKAR Broadcasting Services, and the department of Microbiology and Molecular Genetics.

To learn more about MSU Safe Place visit www.msu.edu/unit/safe. For more information about making a gift to MSU Safe Place, contact Director of Development for Student Affairs and Services Ann Marie Lindley at (517) 355-7535.



Sashi and C.A. Reddy

ALL UNIVERSITY GIVING CONTINUES TO RISE

When economic times are troubled, you might expect that giving to the All University Campaign would suffer, but MSU's Annual Fund reports that campaign giving in 2008-2009 increased 19 percent over the previous fiscal year with 2,887 individuals participating.

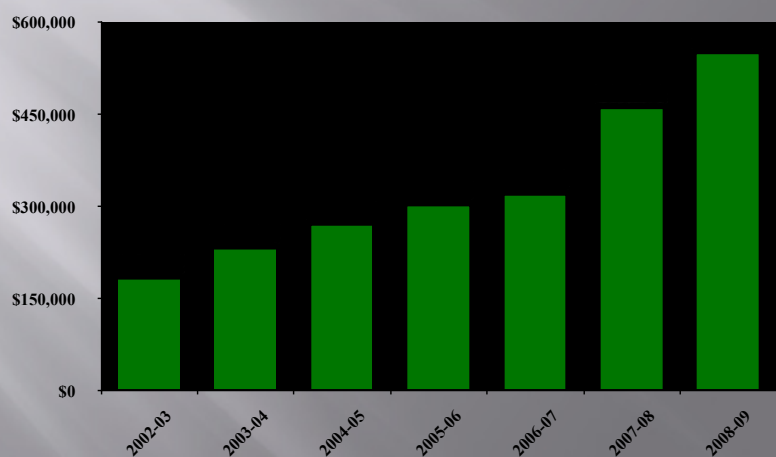
The All University Campaign is held each spring. In this annual opportunity to give, MSU faculty, staff, and retirees receive campaign materials through the mail and also phone calls from the Annual Fund's student telemarketing employees.

Faculty, staff, and retiree giving during the All University Campaign has steadily increased over recent years. Since 2002, dollars raised in the campaign have grown from approximately \$184,000 to nearly \$551,000, an increase of 200 percent, making MSU's employees and retirees among the most dedicated and generous in the nation.

The number of individuals participating in the campaign has also grown substantially. In the 2002 campaign, 691 individuals gave. In the 2009 campaign, 2,887 individuals gave, an increase of 318 percent. There was a dramatic increase in participation from the 2008 campaign alone, when 1,832 individuals gave.

"When the people who best know and understand MSU give back so generously, it underscores the value of investing in all that MSU has to offer," said Bob Groves, vice president for University Advancement. "Their generosity builds on MSU's strong tradition of philanthropic support from faculty, staff, and retirees and MSU certainly benefits from their ongoing dedication and support."

2008/09 MSU Faculty, Staff, and Retiree Giving
- During the All University Campaign -



CHARITABLE GIFTS FROM IRAS STILL AVAILABLE FOR 2009

The \$700 billion economic rescue package of 2008 reinstated the IRA Rollover Provision charitable gift opportunity through December 31, 2009. This allows the owner of a Roth or traditional IRA, providing he/she is at least 70 1/2, to direct up to, but not to exceed, \$100,000 (\$200,000 for a couple with separate IRAs) directly to Michigan State University and/or other qualified charitable organizations. MSU will immediately benefit from the IRA gift. The owner of the IRA does not claim the charitable distribution from the IRA as ordinary income nor may the donor claim the distribution as a charitable deduction. Effectively, there is no federal tax consequence. For more information, contact the development office in your college at MSU, or the MSU Office of Gift Planning at (517) 884-1000.



In the College of Music, the dean and associate deans unanimously opted to give their 2009-2010 salary increases to scholarship funds. From left: Curtis Olson, associate dean for undergraduate studies; James Forger, dean; Rhonda Buckley, associate dean for outreach and engagement; David Rayl, associate dean for graduate studies and research.

YOUR PHILANTHROPY AT WORK

MSU faculty, staff, and retirees are well known for their contributions to the university not only through their hard work, talent, and professionalism, but also through their commendable financial support. Last August, as news spread about significant reductions in state funding to Michigan State students, MSU's deans and vice presidents elected to donate their salary increases to support student financial aid, setting a standard that many others have chosen to follow.

All of MSU's deans and vice presidents signed letters of intent, making a commitment to give back their 2009-2010 salary increases to the university in support of student financial aid. The number of signed letters quickly swelled to 135 as associate deans, associate vice presidents, directors and chairpersons also wished to participate. Since then, numerous other faculty and staff have joined in the effort to pledge their salary increases back to the university.

President Lou Anna K. Simon expressed her appreciation noting, "Their commitment truly embodies the spirit of Team MSU, a spirit that makes this university a very special place. At a time when many of our students and their families are feeling the pinch of the current global economic crisis, the decision of these individuals to give back, along with so many other staff and faculty, is a strong indication of the belief we all share in the core values and important mission of Michigan State University."

Collectively, the gifts from these individuals will add more than a half million dollars in scholarship support with the amount increasing daily as others have pledged their salary increases to scholarship funds. Many directed their gifts to a general undergraduate scholarship fund which will be used by the office of financial aid to meet the needs of students this fiscal year. Others targeted their gifts toward a scholarship fund in their college or school.

For more information about donating to MSU, contact Special Gifts Director Karen Wenk at 884-1084 or the director of development in your college or program.



President Lou Anna K. Simon and Vice President for University Advancement Bob Groves (standing) greeted guests.



Friends John Barkham, Bill and Arlene Sharp, and Carol Welch enjoyed the festivities.



Some members of the All University Campaign Cabinet gathered together including (left to right): Dave Falconer, Helen Waldo with her spouse Dale, and Theda Rudd.



J.R. Haywood and Provost Kim Wilcox connected at the event.

THANKS FOR GIVING LUNCHEON

The annual "Thanks for Giving" luncheon was held on Nov. 2 to honor those members of the MSU community who have made gifts to MSU of at least \$1,000 in the past year, or who are recognized in one of MSU's donor societies. Nearly 500 faculty, staff, and retiree donors packed the Kellogg Center Big Ten Rooms to enjoy a delicious lunch and the company of fellow Spartans.

President Lou Anna K. Simon and Provost Kim Wilcox addressed the crowd with remarks of appreciation, thanking guests for their steadfast support of Michigan State.

The luncheon and all other All University Campaign events are made possible, in part, through the sponsorship of the MSU Federal Credit Union.

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