



40

Ways Our Donors Make an Impact

Donor Impact Statement
2021

The Worcester State Foundation

received
a total of
\$4
Million

from
3,163
Donors

\$1.5 million for scholarships,
\$224,000 for unrestricted support,
\$2.28 million for other University support.

22
New Funds
Created

The foundation transferred **\$2 million** to the University,
including **\$917,525** in direct student support.

The Worcester State Foundation endowment reached
\$40 million with an investment return of **33.6%** in FY21.

40
Ways

Our Donors Make an Impact

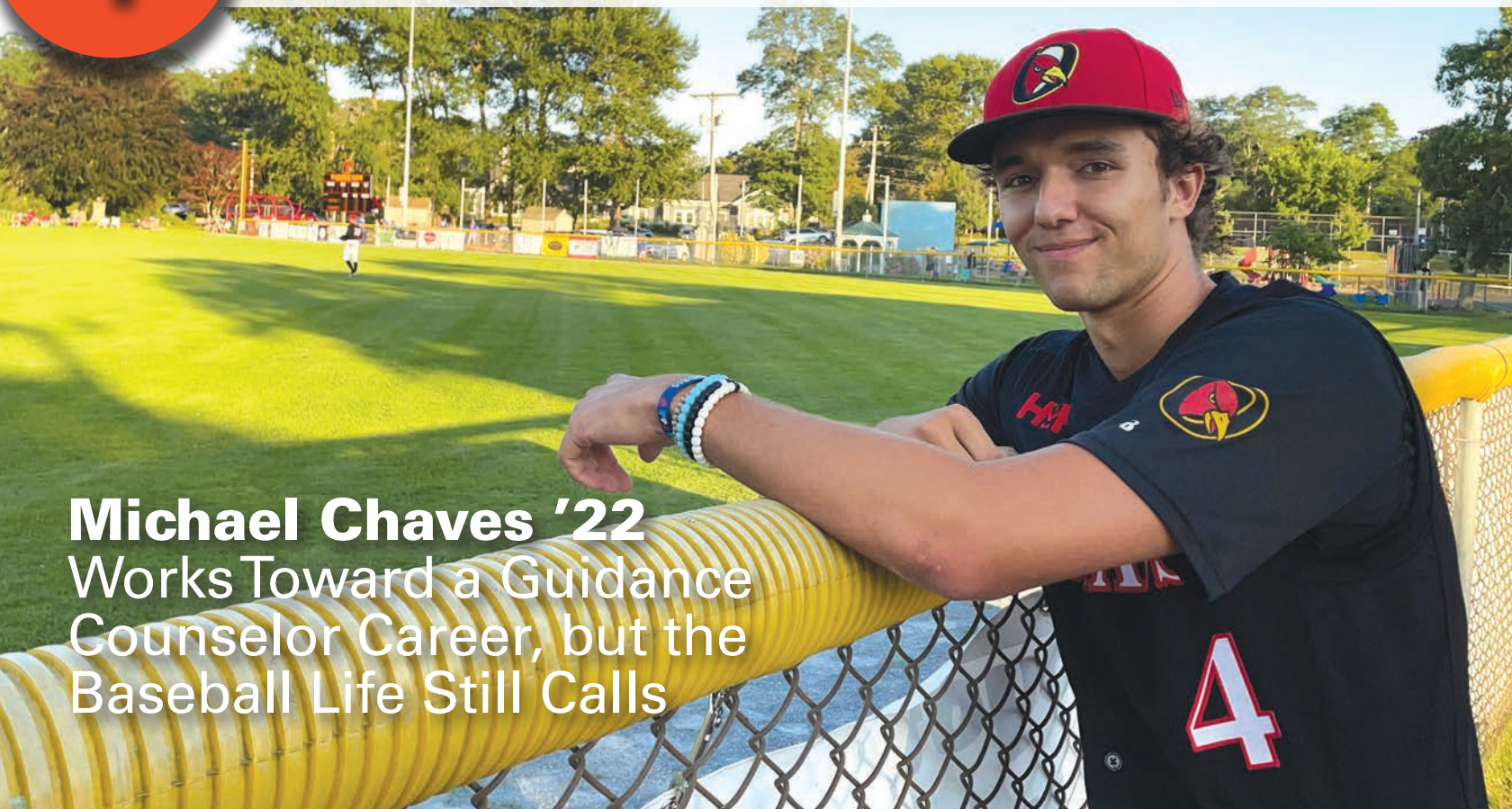
On the 27th anniversary of its creation, the Worcester State Foundation endowment reached \$40 million, which demonstrates a long-lasting financial stability not seen in many other public higher education institutions in this state. To celebrate this milestone, we thought of the 40 ways our donors made an impact this year—one for each million dollars in the endowment.



OUR DONORS MAKE AN IMPACT BY...

Helping Our Students Pay for Their Education

Michael Chaves '22 Works Toward a Guidance Counselor Career, but the Baseball Life Still Calls



Michael Chaves '22

AS WITH MOST STUDENT ATHLETES playing baseball at the college level, Michael Chaves '22 lives and breathes his sport all year round. Although the senior co-captain is looking forward to leading the Lancers to a successful season next spring, he's also realistic about his chances for continuing to be immersed in the baseball life after college.

As a result, the psychology major and communications minor is focusing on the "student" part of being a student athlete, with an ultimate career goal of becoming a high school guidance counselor.

"I would like to help high school kids with no clear path find a direction and make good decisions," he says. "Every kid is different. I want to help students find their way."

Chaves sees himself in the students he aims to help. On track to be the first in his family to graduate from college, he admits he wasn't the best student in high school. Worcester State helped him to find his way, both in the classroom and on the baseball field.

"Academically, I've done much better in college than I did in high school. You have a lot more say in your schedule, and I have great professors," says Chaves, who was named to the 2020 and 2021 Massachusetts State Collegiate Athletic Conference (MASCAC) All-Academic Team. He has also discovered a love of psychology, and how it informs his natural curiosity about people. "I'm a major people watcher. I like to find out what people think, and I want to know their thought process."

2 Tyler Nims Memorial Scholarship

In 2021, Nathan Childs '18 and Edmond Peladeau '17 created this fund in memory of their friend Tyler Nims. They have successfully raised money to establish this scholarship by holding small fundraising events.

3 Eileen Bolesky Academic Major Award in Nursing

Given to the highest-ranking graduating senior in the nursing major, this award was established in 2021 by Edward '67 and Eileen Bolesky.

4 Matthew Wright Class of '10 Journalism Award

This academic achievement award, established in 2021 by Worcester State alumnus and photographer Matthew Wright '10, is given to the highest ranking communications senior with a concentration in journalism.

5 Robyn C. Leo '82 Memorial Scholarship Fund

Established in memory of beloved WSU alumna and longtime member of the Dr. Lillian R. Goodman Department of Nursing faculty, Professor Robyn Leo, by her family, friends, and former colleagues. This scholarship will keep her legacy of caring and supporting aspiring WSU nursing students alive through scholarship support.

6 SAFE Funds- Education Student Teacher Assistance Fund

WSU faculty member Sue Foo, Ed.D., and professor emeritus Audrey Wright, Ed.D., '62 created this fund to provide supplies to education students participating in student teaching, in order to lower their personal out-of-pocket expenses.

He also worked hard on his baseball skills, transforming from an "okay" high school third-baseman—who relied mostly on bunting to get on base—to the Lancer's starting catcher, finishing the 2021 season with a .292 batting average and two home runs.

And there's still an outside chance he might be able to extend his baseball career in a job that would combine psychology with his catching skills—as a professional bullpen catcher. On a Major League Baseball (MLB) team, bullpen catchers can earn upwards of \$100,000 warming up elite pitchers in the bullpen, among other duties. But each MLB team might only have two bullpen catchers, and securing this rare job is usually a matter of knowing the right coach, or being at the right place at the right time.

He's already laying the groundwork for those all-important connections this summer, serving as the bullpen catcher for the Orleans Firebirds of the Cape Cod Baseball League. He's not on

7 Rosen Cancer Awareness Fund

Established through the generosity of Gregg '86 and Pam '87 Rosen, the Rosen Cancer Awareness Fund aims to provide a robust curriculum that supports peer-to-peer education regarding early cancer detection and screening. The fund will provide an annual stipend to support the Peer Health Educators student-run club as well as an annual scholarship opportunity.



Gregg and Pam Rosen

8 Robert J. Stell Memorial Scholarship

Established in 2021 by Barry Stell in memory of his father, Robert J. Stell, this scholarship will provide support to qualified WSU transfer students from Quinsigamond Community College, supporting the foundation of their future success.

9 Catherine T. Novick Library Award

Francis (Michael) Novick created this award in honor of his late wife, Catherine (Cathie) Novick '71, and retired WSU employee who passed away in 2017. The annual award will recognize students who have a similar passion for research, while continuing his wife's legacy on campus.

10 Experiential Learning Stipend Wine Drawing

Dr. Elizabeth Wark, professor at WSU, and her husband Stephen generously donated a selection of wines, valued at over \$1,700, from their personal collection to encourage others to support the Experiential Learning Stipend Fund they helped establish. They helped raise over \$3,000 additional funds to support internships, student teaching, and practicum opportunities that our students need to thrive after graduation.

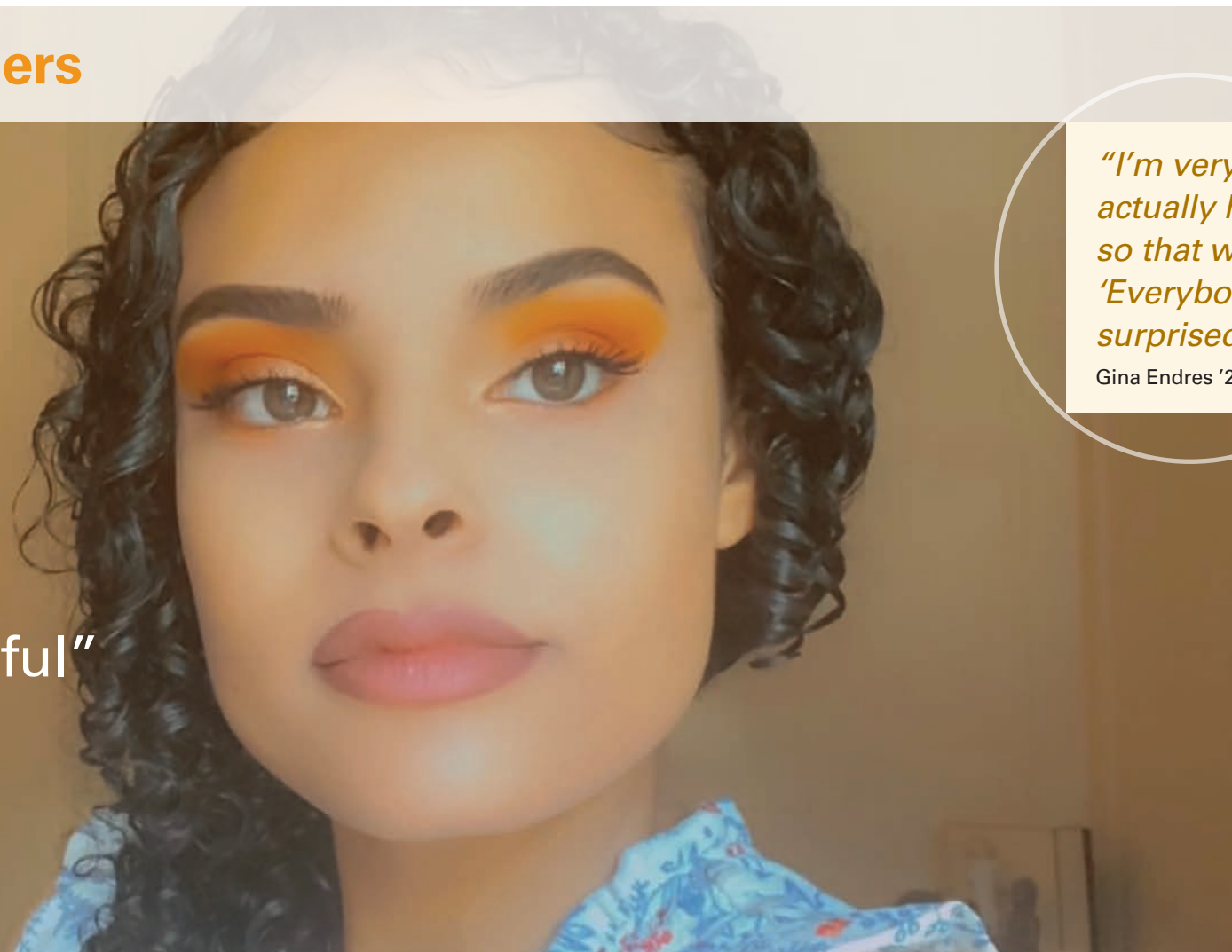
the official roster, but attends each game, helping to warm up the pitchers before and during the games. Before he left for the Cape League, he also spent a few weeks on the roster of the Worcester Bravehearts of the Futures Collegiate Baseball League, a wood-bat summer collegiate baseball league, and may rejoin them once the Cape League season ends.

Tentative plans after graduation include relocating to Florida to pursue a master's degree and to watch over his sister, who has autism and struggles with anxiety and is planning on starting college this fall. Because the pandemic-shortened 2020 season left him with a year of eligibility, he might also be able to play in graduate school—or at least offer his bullpen catching skills.

Chaves received the Gene J. DeFeudis Family Endowed Scholarship (2019) and the Eugene and Carolyn Farraher Memorial Scholarship (2020).

Gina Endres '21

"Surprised and Grateful" for Shartin, Whitney Awards



"I'm very honored to have received those two awards. I've actually had a class with Professor Shartin, and he's fantastic, so that was great. With the Whitney award, I kept thinking, 'Everybody is going to apply for this,' so I was absolutely surprised and so grateful to have received it."

Gina Endres '21

FOR AS LONG AS SHE COULD REMEMBER, Gina Endres '21 had wanted to become a lawyer. "I wanted to help people who had been wrongfully convicted get out of prison, specifically people of color," she says.

Then in 2020, with the killing of George Floyd and Ahmed Aubrey, she began to wonder if working to change public policy would be a more powerful way to help. "The policies that were imposed really affected the way that those situations were handled," she says. "And so, I decided in September that I wanted to pursue a political career."

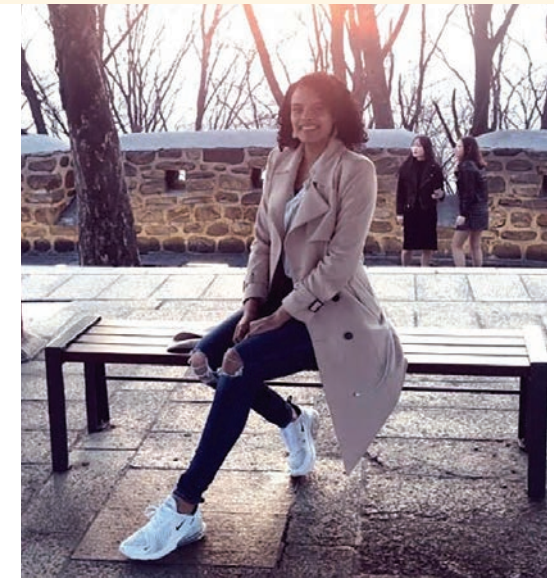
While running for office isn't in Endres' immediate future, she already has taken important first steps toward her goal. This

summer, she landed a job as campaign manager for Boston City Councilor At-Large Julia Mejia, who is running for re-election. To accept that challenging job, Endres deferred her acceptance to Georgetown University for a year. She hopes to eventually earn a master's degree in public policy there.

In the meantime, she is enjoying working on a political campaign and focusing on learning as much as possible about running for office. "It has been really rewarding, although it can get stressful. There's just so much going on all the time," she says. "I'm honored and grateful to have this opportunity. Julia is passionate about her work, and she's an amazing woman to work for."

Endres, a history major and philosophy and pre-law minor, received two awards at Worcester State that align with her academic interests—the Dr. Daniel C. Shartin Emerging Philosopher Award and the Ella M. Whitney Award, named for an 1891 graduate of Worcester State, then known as Worcester Normal School.

"I'm very honored to have received those two awards," she says. "I've actually had a class with Professor Shartin, and he's fantastic, so that was great. With the Whitney award, I kept thinking, 'Everybody is going to apply for this,' so I was absolutely surprised and so grateful to have received it."



Gina Endres '21

She also found time to volunteer on and off campus, including at the Department of Children and Families, Student Clinic for Immigrant Justice, and local soup kitchens, as well as studying abroad in South Korea her sophomore year. "It's completely different from the United States and it definitely took some getting used to, but I met people from all over the world and some of them are my closest friends, even now," she says.

The Shartin and Whitney awards were part of what Endres says were many life-changing experiences at Worcester State. "I've truly been able to experience so much while at Worcester State because of how welcoming and open the university is to students," she says.



Suzanne Crawford-Stacy

“If you can’t speak, you can’t make your wants and needs known. This is a way for individuals to remain as independent as possible.”

Suzanne Crawford-Stacy

SOME PHYSICAL EFFECTS of Parkinson’s disease can be obvious—the tremors, the paralysis, the mobility issues. What is less obvious, and ultimately life threatening, is the risk of losing the ability to speak and swallow, two essential functions that are related to each other.

Suzanne Crawford-Stacy, clinical instructor in the Communication Sciences and Disorders Department (CSD), recently received a SPEAK OUT! & LOUD Crowd Grant from the Parkinson Voice Project that will allow her to treat local residents with Parkinson’s disease through a combination of individual and group therapy, with the goal of helping them retain their ability to speak and swallow.

“Individuals with Parkinson’s tend to be soft speakers due to the weakening of muscles. In this treatment we focus on “speaking with intent and projecting your voice,” explained Crawford-Stacy.

“After receiving individual treatment, patients are invited to practice these techniques in a group setting with other individuals with Parkinson’s disease—called the LOUD Crowd—speaking to each other about everyday topics. This social aspect of this group therapy is important as well,” says Crawford-Stacy, “since patients enjoy meeting and talking to others who are going through the same challenges.”

Because the same muscles used to speak are also used for swallowing, a secondary outcome of the program is helping



individuals maintain their ability to swallow safely. The swallow function is critical, since swallowing complications account for 70 percent of the mortality rate for Parkinson’s patients, according to the Parkinson Voice Project.

This past spring semester, 70 CSD graduate students completed the training program. The grant includes necessary treatment materials as well as support for marketing the free program to local medical professionals, so they will refer their Parkinson’s patients to Worcester State for treatment.

Ultimately, the program has been shown to improve patients’ quality of life, says Crawford-Stacy.

“If you can’t speak, you can’t make your wants and needs known. This is a way for individuals to remain as independent as possible,” she says.

“Our vision at Parkinson Voice Project is to make our highly effective speech therapy program accessible to people with Parkinson’s worldwide,” said Parkinson Voice Project’s founder and CEO Samantha Elandary. A 501(c)(3) nonprofit based in Texas, the Parkinson Voice Project has trained more than 3,500 speech-language pathologists worldwide in its SPEAK OUT! & LOUD Crowd program.

Summer Program Prepares First-Year Students for STEM Success



Daron Barnard, Ph.D.

FOR THE PAST FOUR YEARS, the STEM First-Year Summer Bridge program has helped give incoming first-year students the math skills they need to succeed in science majors ranging from biology and chemistry to computer science.

“Without strong math skills, they don’t progress in their major, which puts them at much greater risk of not only leaving STEM

but also possibly leaving the university,” Daron Barnard, Ph.D., professor of biology and coordinator of the STEM Bridge program, says. “It’s a point at which we can lose students, and this program aims to help prevent that.”

The program, through which students earn three credits, essentially takes the required first-year seminar off students’ fall schedule by moving it into the summer.

“STEM students in general, especially in chemistry and biology, have very heavy, very intense, first-semester course loads,” Linda S. Larrivee, ’76, M.Ed., ’80, Ph.D., dean of the School of Health and Natural Sciences, says. “They have their sciences, their math classes, a mandatory English class, a first-year seminar, and then they’re also taking labs. By moving the first-year seminar into the summer, it makes their first semester less stressful because there’s one less course to take.”

STEM Summer Bridge also gives incoming students a gentle introduction to college so they can start their fall semester on better footing. With a less intense schedule, they can focus more easily on math and science and are not overwhelmed with the number of courses they need to take. “It introduces them to college so that in the fall it’s not a big jump onto the treadmill at a hundred miles an hour,” Larrivee says.

The head start that program gives students can be critical to their success, Barnard says. “It also introduces them to some of the faculty and the campus so when they show up in August, they’re not saying, ‘Okay, who are these people? Who do I need to talk to?’ We give them that beforehand by connecting them with the people who can help them.”

The program was first piloted with multi-year funding from Cornerstone Bank and complemented by institutional in-kind support and endowed funds. Together, these investments have ensured that participating students could attend the program free of charge, further helping with their retention and completion.

Throughout the first three years of the initiative, Cornerstone’s funding also helped to leverage additional financial support from corporate leaders such as Digital Federal Credit Union (DCU), Massachusetts Biomedical Initiatives (MBI), and National Grid. “We are really grateful to each of these community partners for their generous philanthropic support, which has helped the program flourish,” Larrivee says. “We’ve seen such good success with it, as far as benefitting students and helping retain them within both STEM and at the university.”



“It also introduces them to some of the faculty and the campus so when they show up in August, they’re not saying, ‘Okay, who are these people? Who do I need to talk to?’ We give them that beforehand by connecting them with the people who can help them.”

Daron Barnard, Ph.D.

14

Supporting a Vibrant Campus Life

Volleyball and PSAs
Win This Year's
Chandler's Challenge



NEW UNIFORMS, HOCKEY STICKS, a CPR class for students, a team trip to a national dance competition, and bags filled with hygiene items for a homeless shelter are among ways the more than \$46,000 raised through Chandler's Challenge this year will be spent.

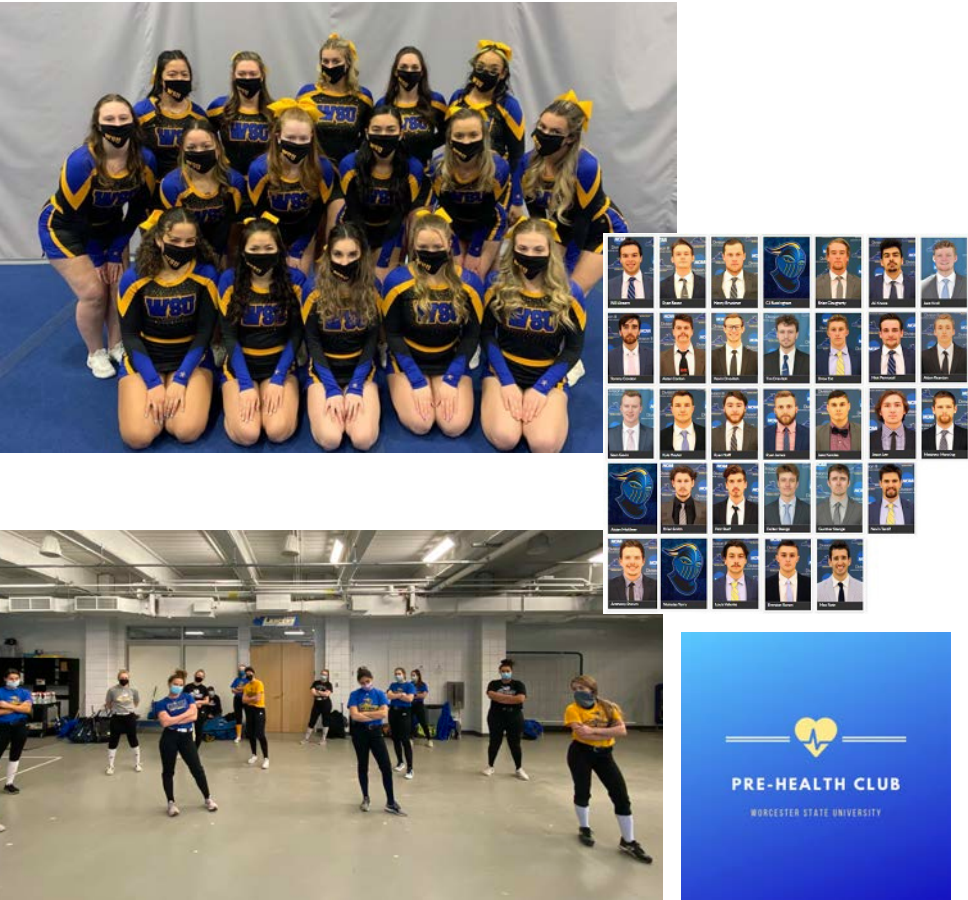
Overall, more than 1,000 donors contributed to 27 teams in a lively crowdfunding competition to see which team could get the most donors per team member at the end of 48 hours. The event was held April 12 to 13.

Teams were broken up into two brackets—athletics teams and campus teams. As a result of their first-place finishes, the Volleyball Team and the Presidential Student Ambassadors (PSAs)

each won \$1,000 in prize money. Coming in second and earning \$500 each, were the Dance Team and Softball. Third-place prizes of \$250 were awarded to: Women's Basketball, Ice Hockey, Cheerleading, and the Pre-Health Club.

Winning teams shared some of the secrets of their success. "The WSU Dance team reached out to several friends, family members, and former club members for support," team member Stephanie Lally '22 says. "Posting regularly on our social media platforms helped us to spread the word faster, as well."

Power Hours allowed teams that got the most donors per member in that hour to receive an additional \$250. Power Hour winners included the Volleyball Team, PSAs, Cheerleading, Women's Basketball, Chorale, and Field Hockey.



"The Women's Basketball team worked together to reach out to friends, family, and alumni, kindly asking them to make a donation towards our team," team member Sarah Blomgren '22 says. "We were strategic about the days and times people donated. We had a lot of donors make their donations during the Power Hours, which was a great help."

"The secret to our fundraising success was communication," Hoang Vo '21 of the PSAs says of their top-place finish. "We coordinated the times to promote donations, especially the Power Hours, and were constantly on social media, which got many people involved."

Sean Gavin '22, who was on the Men's Hockey and Pre-Health teams, says both used the same winning tactics. "The secret to our success was simply promoting our fundraising page on social media and sending the link to all of our friends and family. Everyone was very supportive, and for that we thank them!"

A special \$500 prize was given to the teams in each bracket with the most alumni donors: Women's Lacrosse and the Student Emergency Fund were winners in this category.'

Here are this year's winning teams, the team leaders, and how they plan to spend their winnings.

Athletics Bracket

- 15 1st Place, Volleyball, \$1,000** – Denise Hoxha '22 and Sarah Ward '22, for new team warmups, jerseys, and t-shirts.
- 16 2nd Place, Softball, \$500** – Brynna Meeker '24, for new bats and t-shirts.
- 17 3rd Place, Women's Basketball, \$250** – Sarah Blomgren '22, for team apparel, equipment, and team travel.
- 18 3rd Place, Ice Hockey, \$250** – Sean Gavin '22, for new sticks and goalie equipment.



Campus Bracket

- 19 1st Place, Presidential Student Ambassadors (PSA), \$1,000** – Hoang Vo '21, for hygienic bags, including toothbrushes, toothpaste, soap, etc., for Worcester's homeless community.
- 20 2nd Place, Dance Team, \$500** – Camryn Barry '21 and Stephanie Lally '22, for uniforms and costumes.
- 21 3rd Place, Cheerleading, \$250** – Josie Lopez '21 and Selena Nguyen '21, for a trip to Nationals competition next year.
- 22 3rd Place, Pre-Health Club, \$250** – Sydney Howe '21, for CPR/AED certification classes and guest speakers, including those who can help with medical and graduate program applications.

Student Emergency Fund Provides Support During COVID-19 Pandemic



Anum Rizvi '21

WHEN THE PANDEMIC HIT, Anum Rizvi '21 was a 31-year-old non-traditional full-time student struggling to combine work and school while raising a young child. Within just a few weeks, she and her husband both lost their jobs. "It got tough very quickly," she says. "At the time, my husband was also a student, and we were struggling to pay rent." Hope came in an email from the Worcester State Office of Student Affairs saying funds were available for students in need. "I didn't know if I would get approved or not, but I applied," Rizvi says. Soon after, she received an award from the Worcester State Student Emergency Fund, which had been set up to help students with emergency financial needs such as rent, cell phone bills, and utility bills.

As the pandemic wore on, Rizvi was relieved to receive a second disbursement from the fund. "That money went directly into rent," she says. "It was wonderful because it gave me peace of mind from the stress you have when rent is past due, and you have four or five classes going on and a child to care for." The money allowed Rizvi, a criminal justice major and member of the National Society of Collegiate Scholars, to focus on her studies and work toward her goal of graduating from Worcester State then going on to graduate school. She will enter a criminal justice master's degree program at the University of Massachusetts-Lowell this fall. She plans on doing a concentration in security studies for critical infrastructure. It's the type of work that has very broad applications these days, ranging from protecting the electrical grid from nefarious state actors to helping state and federal

Challenge Matches from Gene and Julianne DeFeudis

The **Worcester State Student Emergency Fund** got a big boost when longtime generous supporters Gene and Julianne DeFeudis offered to match donations to the fund. The fund's aim was to help students through the financial uncertainties of the Covid-19 pandemic.

Since the pandemic hit in March of 2020, 176 students have been awarded approximately \$160,540 in funds that the recipients have said, made a big difference as they faced financial hardships caused by conditions beyond their control. Requests came in for help to cover rent, as well as cable, cell phones, utility bills, textbooks, and meals.

The outpouring of support from alumni, friends, faculty, staff, and even current students has been tremendous. To date, over 588 individuals generously supported the fund to help our most at-risk student population manage financial situations beyond their control. With the incentive of the matching gift from the DeFeudis family, \$74,645 has been raised in FY21 alone.

Gene and Julianne DeFeudis are consistent and loyal supporters of Worcester State, donating hundreds of thousands of dollars over the years for scholarships and other university priorities. "Students at Worcester State are hardworking, and many are going through some tough times these days," says Gene. "If this gift helps some stay in school and graduate, then Julie and I are happy to help."

To support the Student Emergency Fund visit: alumni.worcester.edu/studentemergencyfund



agencies and private companies protect their information networks. "This is a fast-growing area of the industry," Rizvi says. "If you look at cyber security right now, everything is so crazy. There's just so much cyber crime." Rizvi says the emergency funds she received made her feel like the university cared about its students in a time of crisis. With a sense of gratitude, she hopes to pay it forward someday. "People donated money to help me, someone they didn't know," she says. "If I can do the same someday, even if it's not a big amount, I'll be happy to do it and maybe it will make a difference in a student's life, like this did in mine."



"It was wonderful because it gave me peace of mind from the stress you have when rent is past due, and you have four or five classes going on and a child to care for."

Anum Rizvi '21



New Donor
Recognition Society
Honors Consistent
Annual Giving

THIS PAST APRIL, over 600 alumni, friends, faculty, and staff members were recognized as the inaugural inductees to formally launch the new Worcester State University **Loyal Lancers Society**. The society comprises a select group of donors whose sustained support profoundly impacts the university. These members have made gifts to Worcester State for at least the last five consecutive fiscal years. After the June 30 close of this fiscal year, an additional 125 new members were inducted, bringing the percentage of consistent annual donors to over 27 percent of the total donors for this fiscal year.

While WSU has had a longstanding tradition of recognizing donors who give at a significant level, this new recognition society serves to honor those who are committed to giving on an annual basis, regardless of gift amount. This is important for several reasons; consistent giving cultivates a level of engagement in Worcester State that is necessary for growth. One of the ongoing goals of the Division of University Advancement is to act as a conduit, connecting our donors’ interests and passions with opportunities to support students.



LOYAL LANCERS SOCIETY

“I just received the nicest letter from our University, notifying me of my membership in the Loyal Lancers Society at Worcester State University by virtue of my consistent support. I am delighted to be recognized and appreciated, but I must say that since I graduated in 1965 from Worcester State Teachers College I have been eternally grateful for the scope and quality of my education. It has been easy to support my alma mater. I am very proud of the growth of every aspect of the University over these many years.”

Ms. Audrey (Lee) Greenberg ’65, inaugural Loyal Lancers Society inductee

“In order to build upon the culture of philanthropy within our community,” states Vice President for University Advancement, Tom McNamara ’94, “we felt that it was not only important but imperative to recognize individuals whose dedication to Worcester State University’s mission has not wavered, even during a worldwide pandemic.”

Consistent, smaller gifts from a large group of individuals provides sustainability in funding, both for scholarships and programming. In addition to the critical funding these consistent gifts provide, they also create a network of individuals whose belief and investment in higher education inspire a younger

generation of future donors. When alumni and community partners are intrinsically supporting the University’s mission year after year, they are not only financially invested but able to see the tangible and consistent long-term impact they’ve helped provide and the critical role they play in student success.

Thank you to this inaugural group of Loyal Lancer inductees and to all our incredible donors. Your meaningful support continues to inspire generosity and transform lives across our beautiful campus and beyond.



Remembering Casey O'Malley '04 Beloved Alumna Supports Current WSU Students with Bequest

WORCESTER STATE UNIVERSITY was not Casey O'Malley's first choice when looking at colleges. The Clinton, Massachusetts, native had her sights set on NYU, which she later attended as a graduate student. But when the time came to choose a college, the high cost of private higher education continued to steer her back to WSU. "Always the well-informed and practical voice of reason, Casey knew the financial burden

times." Casey's friends from high school and college would drive from the Worcester area to her apartment in New York City every single week when she was undergoing treatment," says Christine. "They would come to clean her apartment, bring her food, or just visit with her."

of attending a private university would be overwhelming," shares her cousin and friend, Christine Lupien. Looking back, WSU would become the pivotal foundation on which extraordinary friendships and opportunities would be built.

Once Casey decided to attend Worcester State, she committed to the experience 100 percent. She was involved in crew, dance, photography, and double majored in communications and Spanish as an honor student and secretary of her graduating class. Years later, when diagnosed with mesothelioma, a rare form of cancer, while working in her dream job at NBC Studios in New York City, it would be the friends she made during her first year at WSU who would be there during the most difficult



Casey O'Malley '04

"It was never a question. Casey welcomed the opportunity to give back to Worcester State and did so each year. It was important to her to give back to the institution that provided her with so many opportunities."

Christine Lupien

Casey was exceptionally driven in her career aspirations and equally passionate about global travel. She traveled extensively throughout Japan, China, and Europe and had an African safari trip planned while she was going through cancer treatment. Even during her illness, she made the long journey to Hawaii, never limiting herself but, true to form, embracing every occasion for adventure.

Always an advocate for social justice opportunities to elicit change, Casey became a staunch advocate of cancer awareness and fundraising and worked tirelessly throughout her battle with mesothelioma to shine a spotlight on the lack of funding it receives.

When asked what motivated Casey to establish this planned gift to support current students at Worcester State, Christine says, "It was never a question. Casey welcomed the opportunity to give back to Worcester State and did so each year. It was important to her to give back to the institution that provided her with so many opportunities."

Casey had been able to attend Worcester State through scholarship support, and that support enabled her to pursue her passion for television and broadcasting, setting her up for a successful career. While she initially resisted attending a state school, after graduation she could often be found encouraging high school students to consider starting their academic paths at a school like Worcester State. "She realized the many benefits and considerable opportunities it can provide," Christine says.

This scholarship in Casey's memory will help ensure that others will be provided with a solid foundation from which to launch. Through this meaningful scholarship support, Casey's extraordinary legacy, her leadership, and her exuberance for living a full and meaningful life will endure through the many students this funding will support.

Leaving a Legacy:
Bequests in memory of beloved alumni and friends provide an enduring legacy

- 27** **\$175,906 gift from the estate of Dorothy F. McLoughlin '54, M.Ed., '56** to the named Endowed Scholarship.
- 28** **\$142,786 gift from the estate of William J. Mullin** to the Eileen and William Mullin Scholarship.
- 29** **\$113,538 gift from the estate of Marguerite E. St. Amand '73** to the Ronald F. St. Amand Biology Scholarship.
- 30** **\$70,000 gift from the estate of Edna P. Spencer** to the Olivia Rochelle Spencer Memorial Scholarship.
- 31** **\$50,000 gift from Fred Pula** to the Marilyn Miller Pula Memorial Scholarship Fund.
- 32** **\$20,000 gift from the estate of Norine M. Florian '57** to the Worcester State Fund.



33 Giving Gifts that Last Forever

All About Endowments

How Does the Worcester State Foundation Invest and Spend the Endowment?

The investment policy of the Foundation has two objectives:

- 1. Preserve the purchasing power of the assets over time
- 2. Provide a stable flow of funds to meet the distribution commitments

THE ENDOWMENT AND TRUST COMMITTEE

of the Foundation Board meets quarterly to review securities, cash assets, and investment strategies and recommends the annual spending payout for the upcoming fiscal year (July 1 through June 30) to the Foundation Board.

The spending rate for endowment funds is determined by calculating 5 percent of the fund’s market value averaged over the preceding 12 quarters. Until the fund has been in existence for 12 quarters, the market value will be averaged over the number of quarters it has been in existence.

How to Create an Endowed Fund

An endowment can be created by making a one-time gift of cash, credit card, or securities, or by establishing a pledge, payable over five years or less. Endowments can also be created with planned gifts, as directed by estate plans, a charitable gift annuity, or a trust. Funds can be initiated by an individual or a group of people and are often inspired by a desire to celebrate a loved one or support a shared interest.

The minimum amount needed to create an endowment depends on the purpose of the fund and your motivation for establishing it. For example, scholarship endowments begin at \$25,000 and typically result in yearly distributions of \$1,000.

Types of Endowment Funds

Scholarships

Named scholarships enable the donor to create a permanent tribute, while helping Worcester State attract and provide educational opportunities to many talented and deserving students. Donors may determine the criteria for how the recipient will be chosen.

Academic Awards

Named awards can be established to recognize a student excelling in a specific discipline, while offering a lasting legacy for the donor.

Departmental Endowments

The quality of the academic experience at Worcester State guides daily decisions and inspires future endeavors. These funds provide budget enhancements for a designated department or academic program and the ability to respond to unexpected opportunities.

Lecture Series/Visiting Scholars

These funds are used to support the development and management of a speaker program, either campus-wide or designated to a specific department. Lecture series and visiting scholars expose students to individuals they can aspire to emulate, offering insight, advice, and guidance on specific or general topics.

Distinguished Professorships

These funds (meant to supplement faculty salary, not replace it) offer a way to recognize a faculty member and enrich his or her work. The restricted funds can be used to underwrite expenses related to research, visiting lecturers, research/student assistants, and publication expenses, thereby enhancing the faculty member’s impact on student experiences.

If you are interested in learning how you can create an endowed fund, please contact Thomas M. McNamara, Vice President for University Advancement, at tmcnamara@worchester.edu or 508-929-8033.

- 34** \$135,000 anonymous alumna gift to create endowed funds in support of student learning
- 35** \$87,500 from **Imoigele P. Aisiku, M.D., '92, M.D.** in support of the STEM Center, named for him, and its initiatives.
- 36** \$50,000 gift from **Dr. GB and Alexandria '85 Singh** to support the expansion of the Singh Simulation Center.



Permanently Invested Funds
Held Within the Endowment

The 125th Anniversary Scholarship

The Jacob and Laeh '42 and Gail '68 Aframe Scholarship

The Shirley Albert Endowed Scholarship

The George H. Albro '65 and Lillian (Brooks) Albro '65 Education Academic Achievement Award

The Alden Faculty Development Fund

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Sincerely,

Thomas McNamara ‘94
Vice President for University Advancement

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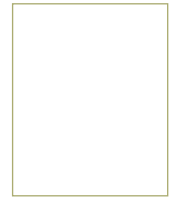
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