

# SMU CAMPAIGN UPDATE

SMU UNBRIDLED: THE SECOND CENTURY CAMPAIGN

DECEMBER 2014

## PRESIDENT'S MESSAGE

As we celebrate the holiday season and reflect upon the passing year, I want to express my gratitude to all of those who have done so much to support SMU's exciting progress.

Much of this progress is the direct result of contributions to The Second Century Campaign, which have enabled SMU to continue to take major strides forward in all areas.

The quality of our student body has been measurably enhanced, our esteemed faculty includes more experts in a wider array of disciplines than ever before and we continue to add critical new facilities to our unique campus.

The adjacent story reports on three new gifts to create endowed faculty positions, the most recent examples of support fueling the drive toward achieving a University total of 110 such positions.

In conjunction with our commemoration of the Year of the Faculty in 2014, SMU hosted a centennial luncheon during Homecoming Weekend that honored the generous donors of endowed faculty positions throughout the University's history.

This issue of *Campaign Update* also includes a report on the ongoing success of *Join the Stampede*, the donor challenge designed to encourage at least 25 percent of SMU's alumni to provide a gift this year and every year. Yearly gifts are an essential source of support and play an important role in university rankings.

While we rightly celebrate what the campaign has helped SMU achieve thus far, it is important to remember that our work is not complete. The end of the holiday season brings a new year that is of special significance to the University – the final year of The Second Century Campaign.

At this crucial time, let us remember that important goals remain to be achieved, including reaching the campaign's overall financial goal. The commitment of all who care deeply about SMU's future will be required as we move forward in the coming 12 months.

Now is the time to redouble our efforts as we work to ensure a truly great second century on the Hilltop.

Sincerely,



R. GERALD TURNER

SMU  
*Unbridled*  
100

## The Second Century Campaign

- Student Quality
- Faculty and Academic Excellence
- Campus Experience



## WORLD CHANGING

### *New endowments add to SMU faculty strength*

As SMU continues its commemoration of the Year of the Faculty, three new gifts for endowed faculty positions have brought the total number of such positions at SMU to 102 en route to achieving a goal of 110.

A gift of \$2.5 million, made through the Texas Methodist Foundation, will establish the Susanna Wesley Centennial Chair in Practical Theology at Perkins School of Theology. A \$1.5 million gift from business leader and SMU alumnus Jack D. Knox '60, '63 will establish the Jack Knox Chair in the Rights and Protection of Children in Dedman School of Law. And a gift of \$1 million from two SMU alumni will establish the Janet and Craig Duchossois Professor in Management and Organization in Cox School of Business.

"Increasing the number of endowed faculty positions at SMU is a major goal of The Second Century Campaign," said President R. Gerald Turner. "We are grateful to all of the donors who have helped us by supporting this goal."

During Homecoming Weekend, SMU hosted a historic gathering of donors whose gifts have provided endowed faculty positions since the University's founding, and the faculty who currently hold those positions. The luncheon – part of SMU's celebration of the Year of the Faculty – was held November 14.

"Donors of endowed chairs help SMU to attract and retain outstanding faculty who bring with them active research programs as well as a dedication to teaching," said Paul W. Ludden, SMU provost and vice president for academic affairs. "Interacting with other distinguished faculty, they enable us to build a community of scholar-teachers who inspire our students and one another."

The new theology chair honors Susanna Wesley, frequently referred to as "the mother of Methodism." The special "Centennial" designation denotes an endowment that also includes operational funds to provide immediate impact while the endowment matures.

**Top (L-R)** Kathryn Hedges Arata '87, '91, Jeremy duQuesnay Adams and Stephen L. Arata '88 were among the guests at a November 14 luncheon honoring donors of SMU endowed faculty positions. The event was part of the University's commemoration of the Year of the Faculty. The Aratas' Second Century Campaign gift established the Jeremy duQuesnay Adams Centennial Professorship in Western European Medieval History in honor of the longtime SMU professor.

"The discipline of practical theology helps students reflect on and formulate conclusions about the various fields of theological inquiry as they relate to one's practice of ministry," said Perkins School Dean William B. Lawrence. "Perkins School of Theology graduates are facing an ever-changing world of ministry opportunities. Helping students think theologically in ministry settings is essential for successful pastors and Christian workers."

The endowed professorship in Dedman Law will support teaching, researching and publishing on legal issues related to protecting the welfare and legal rights of children.

### Faculty World Changers

During the Year of the Faculty, SMU salutes the contributions of its esteemed faculty as educators, researchers and University citizens. A significant contributor to faculty accomplishment is the creation of endowed faculty positions made possible by generous and farsighted donors. Please see page three for a list of faculty members appointed to endowed positions established during The Second Century Campaign.

"Jack Knox's gift will enable the law school to further its teaching and scholarship on children's rights," said SMU Judge James Noel Dean and Professor of Law Jennifer M. Collins. "Endowment gifts like this provide critical support for our commitment to excellence in the classroom and continued cutting-edge, impactful work by our faculty."

The new Duchossois Professor in Management and Organization will strengthen the Cox School in an area of increasing importance to corporations and other types of institutions.

"The Department of Management and Organizations in the Cox School offers students tools to succeed in a globally competitive environment," said Cox Dean Albert W. Niemi. "The increased faculty strength provided by this new professorship will enable more students to develop skills that help prepare them for future leadership in the business world."

Kal Grant '88, '00

Kal Grant serves as the chair of SMU's Planned Giving Advisory Council, as a member of the SMU Board of Trustees' Development and External Affairs Committee and as a member of the Campaign Steering Committee for Cox School of Business. She graduated from SMU with a B.B.A. in Accounting and an LL.M. in Taxation. She serves as Managing Director with Tolleson Wealth Management. *Campaign Update* spoke with Ms. Grant about SMU's upcoming focus on planned giving and the advantages of such gifts.



**Campaign Update:** SMU will highlight the importance of planned giving throughout 2015, the final year of The Second Century Campaign. Why are planned gifts important right now?

**Grant:** All written commitments to The Second Century Campaign are recognized in the campaign total, including planned gifts that enable a donor to participate in the campaign at a higher level without additional outlays of cash this year or next year. Most important, planned gifts help ensure SMU's success in the future!

**CU:** What would you like donors to know about planned gifts?

**Grant:** Planned giving is for everyone. A common mistake is the belief that planned giving is only for wealthy people. In reality, every individual and family can make a difference to SMU through planned giving. Unlike cash donations, planned gifts are typically made from assets in your estate, rather than with disposable income during your lifetime. They can even be made with portions of life insurance proceeds or retirement accounts at your death. Many types of planned giving vehicles also offer income benefits to donors and their families, sometimes with considerable tax savings.

**CU:** In your career as a financial advisor, how have you seen families benefit from incorporating planned gifts into their estate and tax planning?

**Grant:** Philanthropic planning is an integral part of most wealth planning. Not only am I looking for ways to help my clients be more tax efficient with their planning, but I am also helping guide them to establish commitments to the charities that mean the most to them. Making annual gifts is critical, but I would be remiss if I didn't remind my clients that those annual gifts will stop after their death. I ask them how they can continue to support their charity of choice long after they are gone, and how they can let their families know which charities they would want them to continue to support. Often the answer is through a planned gift.

**CU:** You are a member of the Dallas Hall Society, which was established to recognize the generosity and foresight of those who have provided future gifts for SMU. Why did you decide to make a planned gift to SMU and join the Dallas Hall Society?

**Grant:** I included SMU in my estate plans through a bequest in my will. For me, this was the simplest way to accomplish my goals of thanking SMU for all the great opportunities it has provided and giving something back. Once I updated my will, all I had to do was notify SMU in writing of my planned gift. It is easy, and something that many people can do!

# PLANNING FOR THE NEXT CENTURY

## \$30 million goal for planned giving established

Gifts provided to the University through estates and trusts have played a critical role throughout SMU's history, helping ensure long-term support for a range of University priorities. Such gifts also have had a significant impact on the success of The Second Century Campaign: expectancies and matured gifts have accounted for more than \$112 million of the campaign's total to date.

Because these gifts are important to SMU's future and allow donors great flexibility, planned giving will receive special emphasis in the final year of the campaign. The University has set a goal of securing an additional \$30 million in planned gift commitments by December 31, 2015.

Planned gifts make it possible for donors to impact the lives of generations of students and faculty while

donors maintain control of their assets. When properly designed, planned gifts take into consideration donors' personal circumstances and the needs of heirs, even as they secure much-needed financial resources for SMU in its second century. Donors are honored during The Second Century Campaign for their generosity as they leave a meaningful legacy of support.

The income and estate tax advantages of such planning can be substantial, especially on appreciated securities and properties. In many cases, a donor can continue to receive income for life.

The focus in 2015 will encourage SMU supporters to consider using both current and deferred gifts to participate in The Second Century Campaign at the fullest level possible.

## GIVING CHALLENGE STAMPEDES PAST INTERIM GOAL

The *Join the Stampede* giving challenge picked up momentum as more than 7,500 SMU undergraduate alumni made a gift to SMU between June 1, 2014, and Homecoming Weekend. The total significantly surpassed not only the original goal of 6,000 donors by Homecoming but also the goal of 7,000 donors by December 31, 2014 – key milestones on the path to setting a new record for giving in a single school year.

"This year, 7,514 SMU alumni have established a new record for giving in the first six months of the year," said Leslie Long Melson '77, SMU Alumni Board chair. "Because of the extraordinary response, we've extended our goal for the holidays to 8,500 donors. We hope the generosity of the more than 7,500 alumni who have given will inspire other Mustangs to join them."

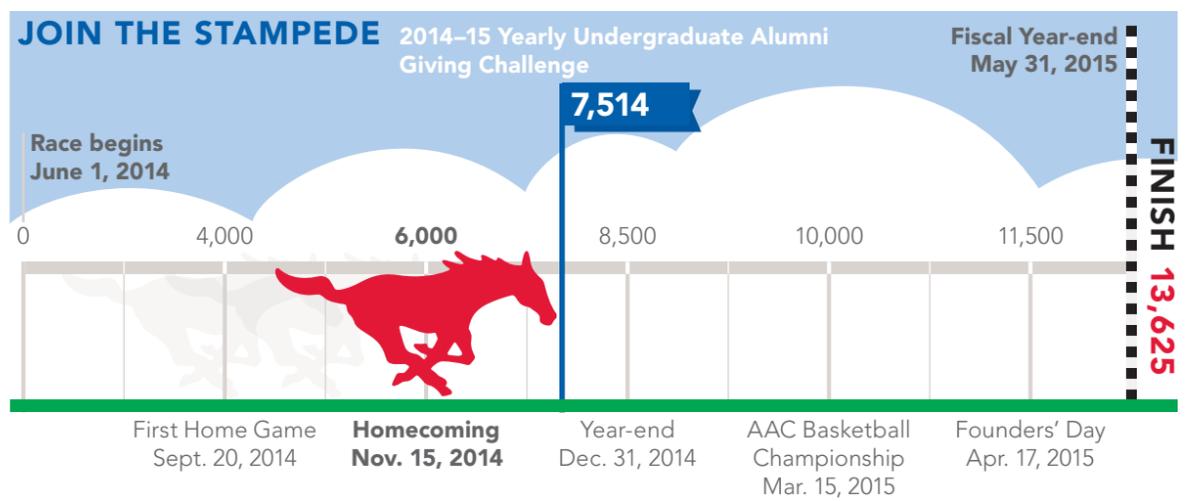
In addition to the undergraduate alumni, thousands of graduate alumni, parents, faculty and staff, and friends also have given during this school year.

*Join the Stampede* was launched to encourage alumni giving and help SMU achieve one of the key goals in The Second Century Campaign: having at least 25 percent of

undergraduate alumni make a gift to the University every year. In each of the past three fiscal years, 24 percent of SMU alumni made a gift. The 12-month period from June 1, 2014, through May 31, 2015, is the last fiscal year of the campaign and the last chance to reach the 25 percent total. A total of 13,625 undergraduate alumni donors is needed by May 31, 2015, to achieve the 25 percent giving percentage.

Yearly participation rates affect rankings by *U.S. News & World Report* and other ranking services, raise SMU's stature and increase the value of a University degree.

"Much of the success of *Join the Stampede* to this point is the result of hard work by SMU alumni who have volunteered to contact their friends and classmates," said Marianne B. Piepenburg '81, assistant vice president for alumni and constituent giving. "In addition to the generous gifts of reunion classes, we saw incredible success in the Dallas-area neighborhoods and regional alumni chapters across the country that set specific giving targets – and activated volunteers to make personal calls to achieve those targets."



## SMU HAPPENINGS



### Denver campaign celebration

Alumni, parents and friends of SMU from the Denver area have made commitments of more than \$7.6 million toward The Second Century Campaign. The Denver Campaign Co-chairs, Liz Martin Armstrong '82, who chairs the Dedman College of Humanities and Sciences executive board and serves as co-chair of the campaign's West region, and Bill Armstrong '82, a member of the SMU Board of Trustees, both graduated with degrees in geology.



### President's Associates Reception

SMU President R. Gerald Turner greets attendees at the annual President's Associates Reception. The event was held September 26 at the George W. Bush Presidential Center during the exhibition *Oscar de la Renta: Five Decades of Style*. President's Associates honors donors who have made pledges or gift payments of \$1,000 or more to SMU in a calendar year.

## MORE BEAUTIFUL AT 50

### Major exhibitions to mark Meadows Museum anniversary

The Meadows Museum will celebrate the 50th anniversary of its founding in 2015 with two blockbuster exhibitions.

*The Abelló Collection: A Modern Taste for European Masters*, running April 18 through August 2, 2015, will feature some 70 paintings from the 15th through the 20th centuries. *Treasures from the House of Alba: 500 Years of Art and Collecting*, the first exhibition in the United States of works from one of the most significant private collections of European art in the world, will be on exhibit September 4, 2015, through January 3, 2016.

A special ceremony celebrating the anniversary will be held April 17, 2015, as part of Founders' Day Weekend.

*The Abelló Collection* includes works by such Spanish masters as El Greco, Jusepe de Ribera, Francisco Goya, Salvador Dalí and Pablo Picasso, as well as by other European artists including Georges Braque, Canaletto, Edgar Degas, Francis Bacon (see illustration), Henri Matisse and Amedeo Modigliani, among others.



Above Francis Bacon (Irish, 1909–1992), *Triptych* (detail), 1983, Oil and pastel on canvas.

Based in Madrid, Juan Abelló is one of Spain's most prominent art collectors and has been internationally recognized as one of the top 200 collectors in the world since he began collecting more than three decades ago.

*Treasures from the House of Alba* features more than 100 European works – from paintings by Goya and Rubens to 16th-century tapestries by Willem de Pannemaker and 19th-century furniture created for Napoleon III as well as illuminated manuscripts, books, historic documents, miniatures, antiquities, prints, sculpture, drawings and other objects. Most of the art has never been seen outside Spain.

“Both of these landmark exhibitions are essential components of the Museum's 50th-anniversary celebration,” said Mark Roglán, Linda P. and William A. Custard

Director of the Meadows Museum and Centennial Chair. Presenting *The Abelló Collection* and *Treasures from the House of Alba* back to back is a once-in-a-lifetime opportunity for the Meadows Museum and the audiences it serves.”

## GIFT CREATES AWARDS FOR INSPIRING SMU TEACHERS

A gift of \$1 million from Charles Mangum '86 and his wife, Elaine Sheffer Mangum '89, in honor of Charles' parents will endow the Barbara and James Mangum Endowed Awards for Teaching Excellence. The gift was made as SMU continues its celebration of the Year of the Faculty.

Beginning in 2016, the awards will be presented annually to outstanding nontenured and tenured-track accounting faculty in the Cox School of Business and economics faculty in Dedman College of Humanities and Sciences. The awards will strengthen SMU's national reputation as a center of higher learning by

rewarding faculty who inspire and expand the minds of students in these classes.

“I always wanted to do something for SMU that had purpose,” says Charles Mangum. “It was important to me that the awards recognize those who are shaping traditional classroom learning for many years to come.”

Charles Mangum was a double major in economics and finance. He and Elaine met at SMU and were married in Perkins Chapel. The Mangums are residents of Boston, Mass. Their son, James '14, is also an SMU graduate and lives in Dallas.

## SMU CELEBRATES HOMECOMING



Above A three-story running SMU Mustang on the west side of Expressway Tower was unveiled during Homecoming Weekend on November 13–16, part of a new tradition of lighting campus landmarks for celebratory occasions. For more information, please visit [smu.edu/100/light](http://smu.edu/100/light).

Above Right The Distinguished Alumni Awards, the highest honors SMU bestows upon its graduates, were presented in a campus ceremony November 13. (L-R) Recipients John F. Harper '68; Frank M. Dunlevy '71 and Mary Brinegar '69 with Emerging Leader Award winner Alexandra Dillard Lucie '05.



Above Actor Brian Baumgartner '95, who served as Homecoming parade grand marshal (right) greets his former teacher Bill Lengfelder, professor in the Division of Theatre in the Meadows School, during a question-and-answer session with students November 14 in the Margot Jones Theatre.

## FACULTY WORLD CHANGERS

Celebrating the Year of the Faculty, SMU salutes the contributions of its esteemed faculty members as inspiring educators, gifted researchers and committed University citizens. A significant contributor to faculty accomplishment is the creation of endowed faculty positions made possible by generous and farsighted donors. Below is a list of faculty members appointed to endowed positions established during The Second Century Campaign, ordered by the years the positions were created. (The list does not include newly endowed positions for which a faculty member has not yet been appointed. For a complete list of all SMU endowed faculty positions, please visit [smu.edu/facultydonors](http://smu.edu/facultydonors).)

**David B. Miller Professor**  
Edwin L. Cox School of Business  
Professor Gordon Walker, Ph.D.

**Judge James Noel Dean and Professor**  
Dedman School of Law  
Dean Jennifer M. Collins, J.D.

**Leon Simmons Dean**  
Annette Caldwell Simmons School of Education and Human Development  
Dean David J. Chard, Ph.D.

**Texas Instruments Distinguished Chair in Engineering Education and Director of The Caruth Institute for Engineering Education**  
Bobby B. Lyle School of Engineering  
Professor Delores M. Etter, Ph.D.

**Wendland-Cook Professor in Constructive Theology**  
Joe and Lois Perkins School of Theology  
Professor Joerg Rieger, Ph.D.

**Robert C. Womack Chair in Engineering**  
Bobby B. Lyle School of Engineering  
Professor Edmond Richer, Ph.D.

**Fabacher Professor of Alternative Asset Management**  
Edwin L. Cox School of Business  
Professor Kumar Venkataraman, Ph.D.

**Bobby B. Lyle Professor of Engineering Innovation**  
Bobby B. Lyle School of Engineering  
Dean Marc P. Christensen, Ph.D.

**Jerome M. Fullinwider Centennial Chair in Economic Freedom**  
Edwin L. Cox School of Business  
Professor Robert A. Lawson, Ph.D.

**Karl Kilinski, II Chair in Hellenic Visual Culture**  
Algur H. Meadows School of the Arts  
Professor Stephanie Langin-Hooper, Ph.D.

**Jeremy duQuesnay Adams Centennial Professor in Western European Medieval History**  
Dedman College of Humanities and Sciences  
Professor Ada-Maria Kuskowski, Ph.D.

**Ruth Collins Altshuler Professor and Director of the Interdisciplinary Institute at SMU**  
Dedman College of Humanities and Sciences  
Professor Caroline B. Brettell, Ph.D.

**Ruth and Kenneth Altshuler Centennial Interdisciplinary Professor in Cities, Regions and Globalization**  
Dedman College of Humanities and Sciences  
Professor Klaus Desmet, Ph.D.

**Patsy and Ray Caldwell Centennial Chair**  
Annette Caldwell Simmons School of Education and Human Development  
Professor Stephanie Al Otaiba, Ph.D.

**Linda P. and William A. Custard Director of the Meadows Museum and Centennial Chair**  
Algur H. Meadows School of the Arts  
Director Mark Roglán, Ph.D.

**Leah Young Fullinwider Centennial Chair in Music Performance**  
Algur H. Meadows School of the Arts  
Professor Stefan Engels, D.M.A.

**Kleinheinz Family Endowment for the Arts and Education Chair in Art History**  
Algur H. Meadows School of the Arts  
Professor Amy Freund, Ph.D.

**Bobby B. Lyle Centennial Distinguished Chair in Cyber Security**  
Bobby B. Lyle School of Engineering  
Professor Frederick R. Chang, Ph.D.

**Martha Raley Peak Centennial Chair and Director of the Meadows Symphony Orchestra**  
Algur H. Meadows School of the Arts  
Director Paul Phillips, D.M.A.

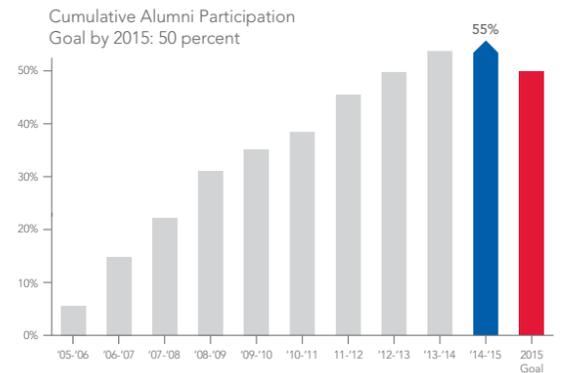
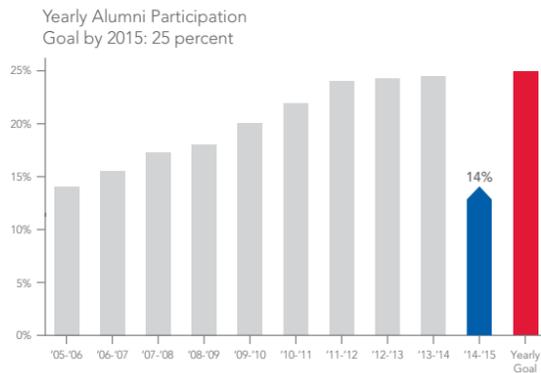
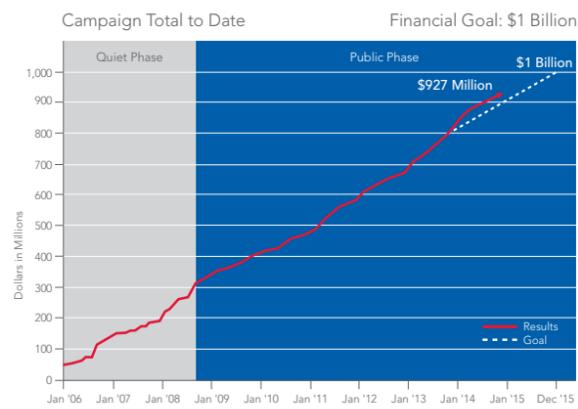
**Annette and Harold Simmons Centennial Chair**  
Annette Caldwell Simmons School of Education and Human Development  
Professor Michael McLendon, Ph.D.



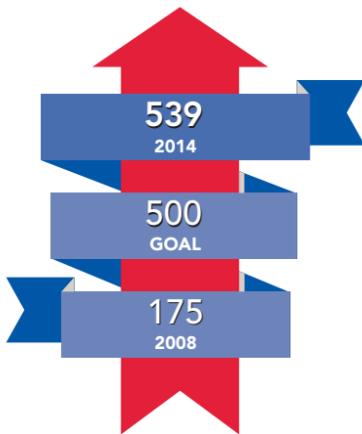
**Leave Your Mark**

When it opens in 2016 the Crain Family Centennial Promenade (rendering at left) will feature messages carved on pavers from thousands of donors. About two-thirds of the pavers have been accounted for. Did you give one? Visit [smu.edu/pavers](http://smu.edu/pavers).

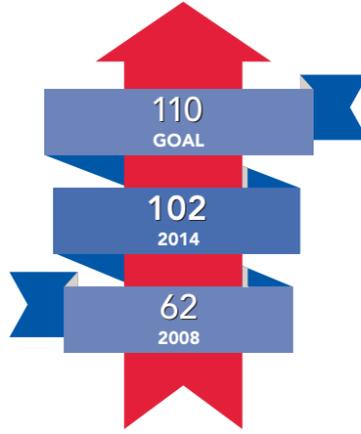
**CAMPAIGN QUARTERLY REPORT**



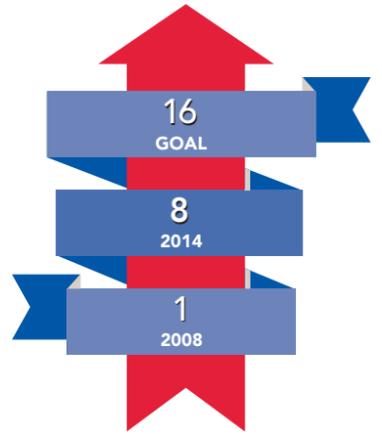
Endowed Scholarships



Endowed Faculty Positions



Major Capital Projects



Data as of December 2014.

**SMU CALENDAR**

**DECEMBER 20**  
Winter Commencement

**JANUARY 1**  
The Second Century Campaign begins final year

**JANUARY 24**  
Fort Worth alumni event

**FEBRUARY 20**  
SMU Tennis Complex dedication

**MARCH 15**  
American Athletic Conference basketball championship

**APRIL 17-18**  
Founders' Day Weekend

**MAY 31**  
Join the Stampede yearly giving deadline

**July 16-19**  
SMU-in-Taos Cultural Institute  
(Registration begins in January at [smu.edu/ci](http://smu.edu/ci))



**Fund supports new Residential Commons model**

SMU is seeking gifts to the Residential Commons Fund to offset capital expenses for the ambitious project that has transformed the living-and-learning experience on the Hilltop. Six existing residence halls were renovated to become Residential Commons as part of the new campus-wide Residential Commons model launched in 2014. Five new Residential Commons buildings, a dining commons and a parking center also were constructed as part of a nine-acre, \$146 million capital project – the largest in SMU's history.

Residential Commons provide an experience that integrates SMU's extraordinary academic offerings with the University's vibrant campus life. Each Residential Commons facility provides campus accommodations for first- and second-year students and also provides an apartment for Faculty in Residence.

Gifts to the Residential Commons Fund support these strong and engaged residential communities on campus. Major gift commitments to the Fund will be acknowledged with a named space within one of the Residential



Commons facilities. For more information about Residential Commons naming opportunities, please contact Pam Conlin at 214-768-3738 or [pconlin@smu.edu](mailto:pconlin@smu.edu).

**CAMPAIGN UPDATE**

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The *Campaign Update* is published by the Division of Development and External Affairs for Second Century Campaign leaders and volunteers. Please direct inquiries to Office of Development and External Affairs, SMU Box 750281, Dallas TX 75275, [campaigninfo@smu.edu](mailto:campaigninfo@smu.edu) or 214-768-2666.

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