

NEWS OF FACULTY, STAFF & RETIREE GIVING TO MICHIGAN STATE UNIVERSITY

# OUR IMPACT

FALL 2016



## Giving Back *in* Tandem

TEAM MSU GIVES • YOU MAKE A DIFFERENCE

# Giving Back in Tandem

by Devon **BARRETT**

He is the director of the MSU Libraries, she is the Ernst & Young Professor of Accounting and former senior associate dean of the Eli Broad College of Business. In academia, Cliff and Sue Haka are what we call a dual-career couple.

When their job search first brought them to campus in 1982, they'd been around enough college towns to know that MSU had everything they were looking for aesthetically. More importantly, MSU's commitment to spousal hiring meant they could both pursue their dream jobs. So they did.

As they worked their way up, they worked their way into the culture of MSU which, for them, meant more than just painting their tandem bicycle green and white and riding it in the Homecoming Parade. It meant giving back to their own departments—an effort which has earned them membership in the Robert S. Shaw and Linda E. Landon giving societies, and helped both the MSU Libraries and the Eli Broad College of Business meet very specific needs.

The Clifford H. and Susan F. Haka Endowment for the Turfgrass Information Center (TIC) is the product of Cliff's affinity for books, golf, and books on golf—more specifically, the world's most extensive public collection of turfgrass educational materials, which resides in the TIC's USGA Turfgrass Information File database.

MSU Libraries relies on subscriptions and private funding to cover a substantial portion of TIC's operating costs, and for a number of years, Cliff made regular contributions through payroll deduction. The decision to support it in a bigger way, helping the library toward its goal of making the TIC self-sustaining, was a no-brainer.

For Sue, the Susan F. and Clifford H. Haka Doctoral Student Support Fund in the Eli Broad College of Business was all about supporting accounting and business students pursuing their PhDs with the goal of becoming faculty.

Personally, Sue enjoyed the constant learning from earning her PhD and pursuing a career in academia. Her own career has taken her around the world and included a term as president of the American Accounting Association. So she knows from experience that the future for these doctoral students is bright. But she also knows the cost of obtaining a PhD can be daunting.

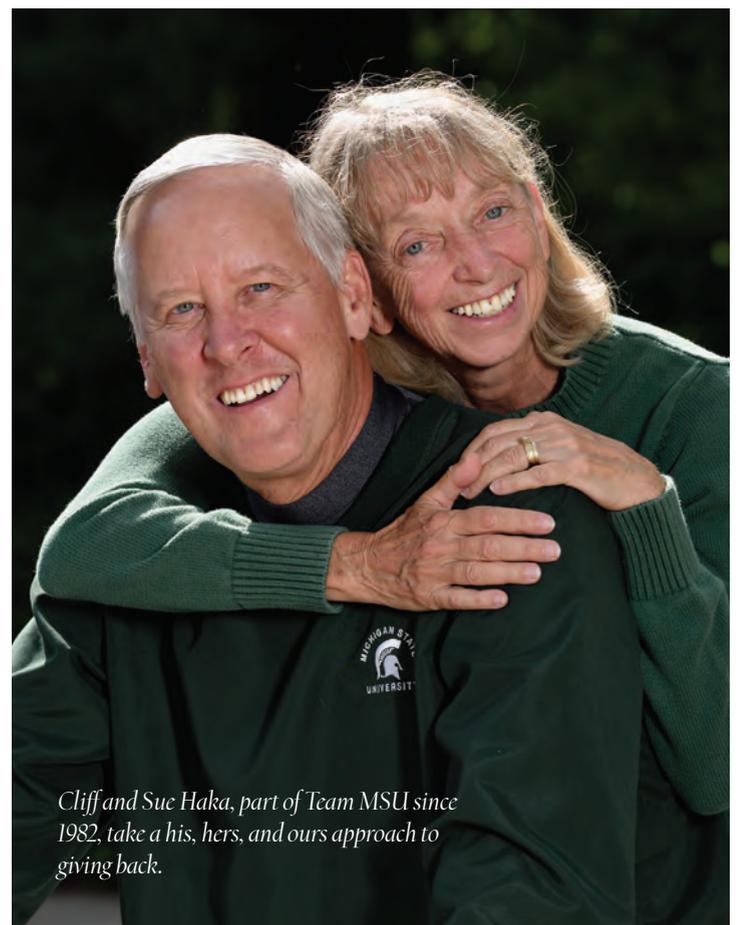
Cliff and Sue have supported many campus causes, but they see their endowments for the MSU Libraries and the Broad College as opportunities to lead by example.

“As administrators, we've both realized that you can't always do all the things you want to do in your department unless you go out and raise money first. It is sometimes challenging to ask people to give, but it's easier if you, yourself, have given too,” Cliff says.

“Our work contributes to the education process that gives way to careers

and opportunities for students, and so does our giving,” Sue adds. “It's rewarding to see the people you've helped as an educator. It's equally rewarding to see the people and places you've helped through philanthropy.”

**To explore any giving option at MSU, contact the University Development officer in your college or unit, or call (517) 884-1000 or visit [givingto.msu.edu](http://givingto.msu.edu)**



*Cliff and Sue Haka, part of Team MSU since 1982, take a his, hers, and ours approach to giving back.*

## Every Spartan Needs *an* Estate Plan

Estate planning is for everyone, regardless of age or assets, because estate plans allow you to provide for the people and causes you care about most.

When creating or updating your estate plans, consider including a charitable bequest to MSU. By leaving a percentage of your estate to MSU, you can provide a generous estate gift yet retain your assets during your lifetime.

The Hakas (see story above) included a bequest to MSU in their personal trusts. You can also make a bequest to MSU by specifying a dollar amount or percentage in your will or trust. It's a simple way to make a difference

without affecting your current cash flow, assets, or lifestyle and it's easy to revise if your circumstances change.

**To learn more** contact the Office of Gift Planning at 517 884-1000 or [giftplan@msu.edu](mailto:giftplan@msu.edu) to discuss options as you are developing your estate plans and wish to remember MSU through a charitable bequest.

**Or visit** [giftplanning.msu.edu](http://giftplanning.msu.edu) for bequest language and other helpful information, including an online tool to explore the financial benefits of various estate plan options and charitable strategies.

# TEAM MSU GIVES

## in record-breaking, Big Ten-topping fashion

It's official. MSU faculty, staff, and retirees are among the most generous in the nation. Gifts to MSU from current and former faculty and staff in the last fiscal year—nearly \$25 million—broke all previous MSU records and were the highest reported in the Big Ten and fourth highest of the American Association of Universities (AAU).

Fiscal year 16 closed out in dramatic fashion on June 30, 2016. Officially determined the most successful fundraising year in MSU history, a grand total of \$272 million was raised toward the *Empower Extraordinary* campaign goal of \$1.5 billion.

The total of outright gifts, pledges, gifts in-kind, and estate gifts from MSU faculty, staff, and retirees to MSU added up to \$24,945,566 at year end. According to the Council for Aid to Education's 2015 Benchmarking Report, among the Big Ten universities that report on their faculty, staff, and retiree giving, MSU is in the top position, ahead of Ohio State, Rutgers, and the universities of Minnesota, Iowa, Maryland, Illinois, Nebraska, and Wisconsin. Among the 60-member AAU universities that reported, MSU had the fourth highest giving from current and former staff and faculty.

"Team MSU—our faculty, staff, and retirees—is critical to our success as a university in so many ways," says President Lou Anna K. Simon. "We are grateful that their dedication is also overwhelmingly evident in their generosity, which will impact our university far into

the future and lead the way for others to invest in us as well."

Since July 1, 2011 when MSU began counting in the *Empower Extraordinary* campaign, the collective support of Team MSU now adds up to more than \$84.3 million—nearly seven percent of all dollars raised in the campaign. To date, more than 12,000 MSU faculty, staff, and retirees have made a campaign gift.

"No one knows MSU better than the people who work here," says Bob Groves, vice president for University Advancement. "The support of faculty, staff, and retirees instills confidence in the broader community of alumni and friends. So, our unprecedented fundraising success really reflects Team MSU's good work and commitment which extends far beyond our professional contributions every day."



### THREE WAYS TO GIVE **3**

#### ONLINE

Now more convenient than ever—with a recurring gift opportunity, you can charge to your credit card. [givingto.msu.edu](http://givingto.msu.edu)

#### MAKE A PLAN

Visit [giftplanning.msu.edu](http://giftplanning.msu.edu) or call (517) 884-1000 to learn more.

#### TALK TO US

Call (800) 232-4MSU (4678).

#### OUR IMPACT IS PUBLISHED BY:

University Advancement  
Michigan State University  
Spartan Way  
535 Chestnut Road, Room 300  
East Lansing, MI 48824  
(517) 884-1000

**Robert W. Groves**  
Vice President,  
University Advancement

**Stephanie Motschenbacher**  
Director,  
Advancement Marketing  
and Communications

**Lois Furry**, Editor

**Devon Barrett**, Writer

**Phillip Knapman**, Graphic Designer

**Harley Seeley**, Photography

[givingto.msu.edu](http://givingto.msu.edu)

## RANKING OF EMPLOYEE GIVING • BIG TEN\*

### #1 MICHIGAN STATE UNIVERSITY

Rutgers University

Ohio State University

University of Minnesota

University of Iowa

University of Maryland-College Park

University of Illinois System

University of Nebraska

University of Wisconsin-Madison

\*Council for Aid to Education FY15 Report. Self-reported cash received from current and former faculty and staff; not all universities report this data.

# RETURNING ON AN INVESTMENT



Mark and Val Montgomery created a scholarship endowment to honor Val's long MSU career.

**“We wanted to pay back MSU for helping me obtain my degrees and for giving me a place to have a fulfilling career.”**

After 26 years, Valarie Montgomery may have retired from overseeing MSU's financial operations every day, but through an estate plan with her spouse Mark Montgomery, her legacy will be felt forever.

Through a charitable bequest, Val and Mark will create an accounting scholarship to benefit the

next generation of financial managers, especially those who might return to school while working. The plan is a fitting testament to Val's professional journey.

Val first realized her love for accounting under the instruction of Mr. Parzych, her teacher at Quincy High School. But at graduation, she opted to fast track her entry into the workplace by earning a certificate in general business, rather than pursuing a bachelor's degree.

It was enough for her to gain experience at several financial institutions and business offices before landing her first position at MSU as a Clerical Technical Level Six employee in 1989.

But she didn't forget about her love of accounting. While continuing to work full-time, she took advantage of MSU's tuition assistance program and a flexible work schedule to obtain both bachelor's and master's degrees in accounting

from the Eli Broad College of Business at MSU. Taking just two classes at a time, one at night and one during the day, it took her 13 years to complete both degrees. A scholarship also played a key role along the way.

As her education and skills grew, Val also rose through the employee ranks of her department. She retired last spring from the Office of Treasury and Financial Management as the manager of MSU's Treasury Services, an Administrative Professional Supervisory Level 15 position.

The Valarie Beckwith Montgomery and Robert “Mark” Montgomery Endowed Scholarship for Accounting will give preference to students who graduated from Quincy High School and are returning to school after having been in the workforce for a time.

“We want a lot of good things to happen in the world,” says Mark. “And MSU is pretty good at making good things happen.”

“We wanted to pay back MSU for helping me obtain my degrees and for giving me a place to have a fulfilling career,” adds Val.

But Val hasn't completely hung up her finance and accounting hat. She currently spends three days a week helping Mark in his financial advising business

**Learn more** about options for remembering MSU through a charitable bequest or other estate plans by contacting the Office of Gift Planning at (517) 884-1000 or [giftplan@msu.edu](mailto:giftplan@msu.edu).

## What happens to retirement assets after you're gone?

**Did you know that the value of your retirement account may be subject to federal and state estate taxes at your death? And, when remaining assets in your retirement plan are distributed to your heirs, they will owe federal *and* applicable state income taxes?**

To prevent this, consider leaving your loved ones less heavily taxed assets than remaining funds in your retirement accounts. And, if charitable giving is one of your goals, consider the advantages of leaving your remaining retirement plan assets to Michigan State to support the areas that are meaningful to you.

As a non-profit organization, MSU is tax-exempt and will receive the full amount of what you designate from your retirement plan. You can take advantage of this tax-free giving opportunity by simply naming MSU as a beneficiary of your retirement plan.

All this requires is updating your beneficiary designation form through your plan administrator. You can designate Michigan State University, East Lansing, Michigan as a primary beneficiary for a percentage of the remaining assets in your retirement plan. You also can make MSU a contingent beneficiary to receive the balance of your plan only if your primary beneficiaries don't survive you.

**Learn more** by contacting the Office of Gift Planning at (517) 884-1000 or [giftplan@msu.edu](mailto:giftplan@msu.edu), or visit [giftplanning.msu.edu](http://giftplanning.msu.edu)

**YOUR GIFTS  
IN ACTION**



**SPARTAN STRONG**

*Drs. Melissa McDaniels (left) and Kristen Renn give annually to support the College of Education, graduate fellowships, the LGBT Resource Center, and the Student Food Bank.*

# EXTENDING *a* WELCOME

Dr. Melissa McDaniels is assistant dean of the Graduate School and director of the Teaching Assistant Program. Dr. Kristen Renn is a professor in the Department of Educational Administration and recently completed a term as director for student success initiatives.

They're both working to create a positive learning environment—but the commitment to their cause doesn't end when they leave

the office. MSU is as much a community as it is an institute of higher education, and Melissa and Kris truly understand the importance of creating a supportive, welcoming place for students to learn and live.

They use payroll deduction to provide support to the College of Education, the Edward J. Petry Endowment for graduate fellowships, the LGBT Resource Center,

and the Student Food Bank. Through their giving, they are ensuring no student feels marginalized or limited by their differences, their struggles, or their circumstances.

"Since the day we arrived at MSU, we have never felt anything but welcome—as both professionals, and as a couple. This is our community, and we give back because that's what you do as a member of a community."

## NEW ANNUAL GIVING LEVELS *Learn more at [go.msu.edu/spartanloyal](http://go.msu.edu/spartanloyal)*

### LEADERSHIP CIRCLE

|                       |                        |
|-----------------------|------------------------|
| SPARTAN STRONG        | \$1,000-\$2,499/year   |
| SPARTAN GREAT         | \$2,500-\$4,999/year   |
| SPARTAN BOLD          | \$5,000-\$9,999/year   |
| SPARTAN INSPIRED      | \$10,000-\$19,999/year |
| SPARTAN EXTRAORDINARY | \$20,000+/year         |

### LOYALTY LEVELS

|               |                  |
|---------------|------------------|
| SPARTAN LOYAL | \$100-\$499/year |
| SPARTAN PROUD | \$500-\$999/year |

*Annual giving recognition totals include donations and matching gifts made during each fiscal year. Lifetime donor society recognition begins at \$50,000 in cumulative giving.*



## THANKS *for* GIVING



*More than 2,000 faculty, staff, and retiree donors were invited to the annual Thanks for Giving Luncheon in October, including Venice Smith (left), Kurt Dewhurst (center), and Suresh Mukherji. The event is underwritten by the MSU Federal Credit Union. Faculty, staff, and retiree donors who have given \$1,000 in the previous fiscal year or are members of a lifetime giving society receive invitations.*

**MICHIGAN STATE**  
UNIVERSITY

**OUR IMPACT**  
UNIVERSITY ADVANCEMENT  
SPARTAN WAY  
535 CHESTNUT ROAD, ROOM 300  
EAST LANSING, MI 48824

ONE DAY  
TUE MAKE A



**DIFFERENCE**

*Join us on Tuesday, November 29, 2016, as Spartans near and far come together to celebrate Giving Tuesday, a global day of giving.*

*Spartans Will. Empower is a chance to give back and make a difference to impact current and future Spartans.*



**SPARTANS WILL. EMPOWER**

Tuesday, November 29, 2016 • #GIVETUEMSU • GIVINGDAY.MSU.EDU