



In This TOGETHER

SOUTHWESTERN MEDICAL FOUNDATION
2020 ANNUAL REVIEW

The boundaries of human spirit were tested in many ways throughout 2020, but we found a depth of resilience never before reached.

As we look back with gratitude – to have persevered, to have been able to serve our community – we are humbled by the tremendous acts of generosity that were so inspired. We thank our supporters for continuing to inspire progress in medicine when it was needed most.



SUSTAINING



UT Southwestern is leading more than 200 research projects related to COVID-19.

COVID-19 Relief: Celebrating Your Generosity

The Latin inscription on our original seal means “through science we serve,” because, in the end, our work is about serving others. As our community met the challenges of 2020 head on, your resilience in advancing medicine was more apparent than ever.

Through our **COVID-19 Response Fund**, North Texas Giving Tuesday Now, and North Texas Giving Day, our community invested to support the greatest needs of our physicians, researchers, and medical professionals. This incredible accomplishment is a shining example of how Texans care for and support one another.

SUSTAINING



Dr. Kirsten Fischer Lindahl, member of The Heritage Society.



Michael and Marsha Baylor, members of The Heritage Society.



Dr. Sloan and Mary Lois Leonard, members of The Heritage Society.



Jeremy and Nancy Halbreich, members of The Heritage Society. Mrs. Halbreich is also a Trustee of Southwestern Medical Foundation.



Drs. Stephanie Terauchi, Steven Leach, and Elizabeth Paulk, leaders of the Supportive and Palliative Care Teams at UT Southwestern's Hospitals and Parkland Hospital.



Dr. William and Toni Turner, members of The Heritage Society.

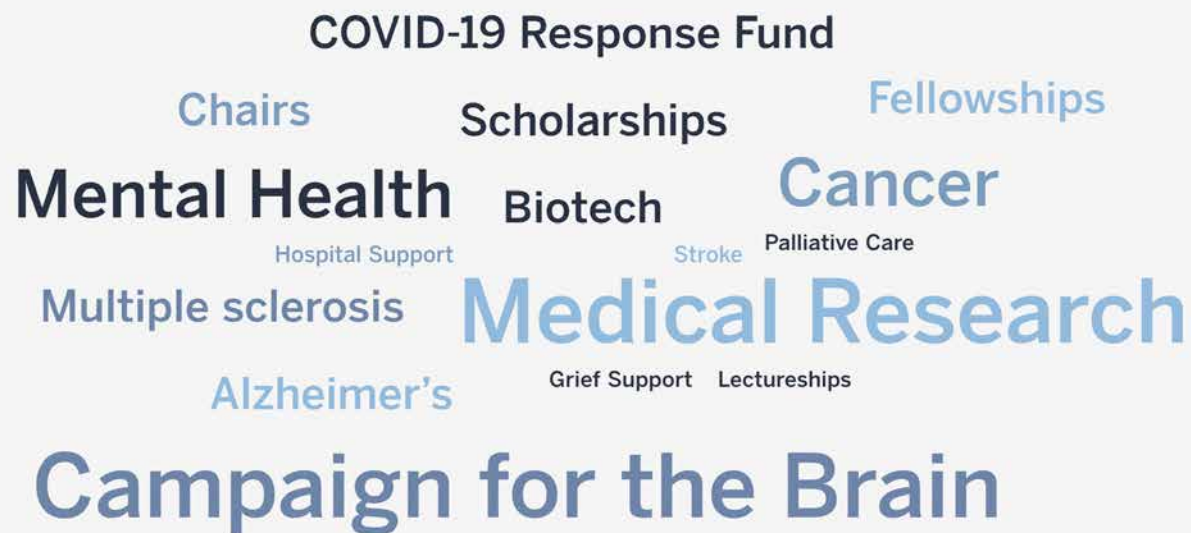


Jody and Sarah Hawn. Jody is an Honorary Trustee of Southwestern Medical Foundation.



Gay and Bill Solomon. Bill Solomon is an Honorary Trustee and was a former Chairman of Southwestern Medical Foundation.

SUPPORTING COMMUNITY NEEDS



A word cloud centered on the page, featuring various programs and areas of support. The words are in different sizes and shades of blue. The largest word is 'Medical Research'. Other prominent words include 'Campaign for the Brain', 'Mental Health', 'Cancer', 'COVID-19 Response Fund', 'Scholarships', 'Fellowships', 'Chairs', 'Biotech', 'Multiple sclerosis', 'Alzheimer's', 'Hospital Support', 'Stroke', 'Palliative Care', 'Grief Support', and 'Lectureships'.

COVID-19 Response Fund

Chairs Scholarships Fellowships

Mental Health Biotech Cancer

Hospital Support Stroke Palliative Care

Multiple sclerosis Medical Research

Alzheimer's Grief Support Lectureships

Campaign for the Brain

SUSTAINING



Lori and Dave Folz, members of The Heritage Society. Mr. Folz is also a member of the Estate Planning Council.

Celebrating the Impact of Planned Gifts

From our beginning, planned giving donors have helped build the Foundation and its capacity for impact in a significant way.

In November, we paused with gratitude for these leaders and also celebrated 25 years of impact led by our Heritage Society members. The Heritage Society honors and recognizes donors who have included the Foundation or UT Southwestern in their estate plans. In a special virtual event to celebrate the 25th anniversary of The Heritage Society, William T. (Bill) Solomon, a Charter Member of The Heritage Society and former Chairman of the Foundation, provided his reflections and led a discussion with Dr. William T. Dauer, Inaugural Director of the Peter O'Donnell Jr. Brain Institute.

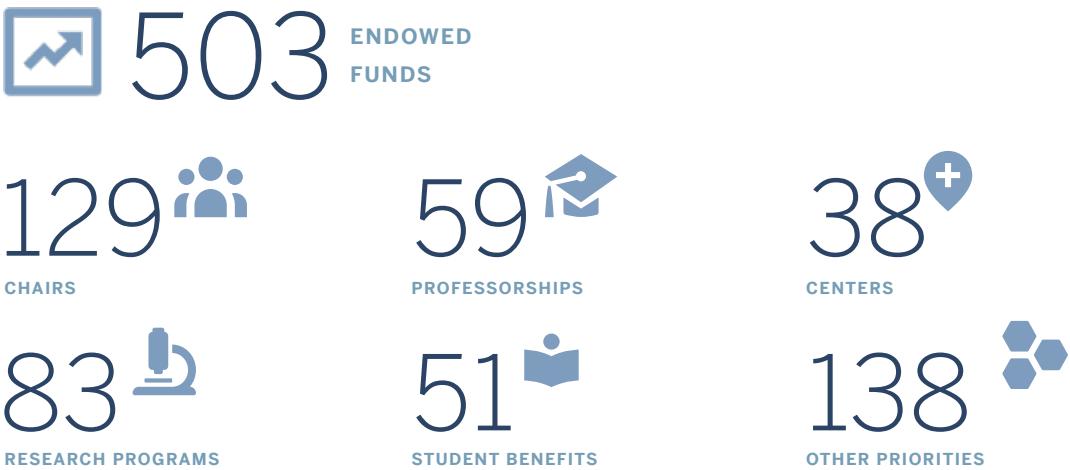
SUSTAINING



1/3

OF THE FOUNDATION'S ENDOWMENT
HAS COME FROM PLANNED GIFTS

USING ENDOWMENT FOR SUSTAINED IMPACT



GENEROSITY + STEWARDSHIP = IMPACT



Growth achieved from successful fundraising campaigns and the generosity of our community, and achieving the Pickens Endowment Fund goal in 2019, along with good investment performance, is propelling the amount the Foundation can grant and the impacts that can be made.

FINANCIALS

\$1B+

LONG-TERM POOLED ASSETS

15.0%

LONG-TERM INVESTMENT PORTFOLIO PERFORMANCE

PERFORMANCE	AS OF 12/31/2020	3 YR.	5 YR.	10 YR.	SINCE INCEPTION
INVESTMENT PORTFOLIO	15.0%	8.2%	9.4%	7.6%	8.2%
BROAD (LIQUID) POLICY INDEX	7.9%	6.4%	8.4%	6.2%	7.5%

LEADING



Best in Class

Despite a year of constant change, our community's incredible leadership and commitment to excellence remained steady and strong.

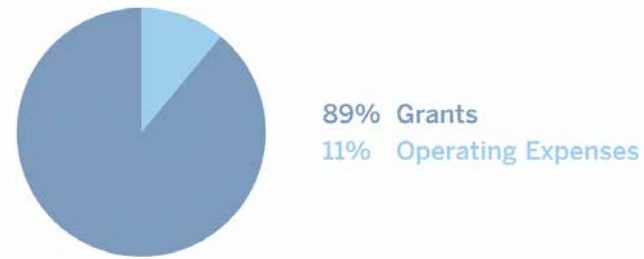
In 2020, Southwestern Medical Foundation was evaluated by Charity Navigator through its Encompass Rating System, **receiving a 100 out of 100 rating**. The Encompass Rating System is a comprehensive evaluation tool that analyzes nonprofit performance based on four key indicators. In July 2020, Charity Navigator released the first indicator, Finance and Accountability, to highlight nonprofit organizations demonstrating fiscal responsibility.

This year, the Foundation also received a **Platinum Seal of Transparency from GuideStar**, another leading charity evaluator. This seal represents the highest commitment to financial responsibility and transparency.

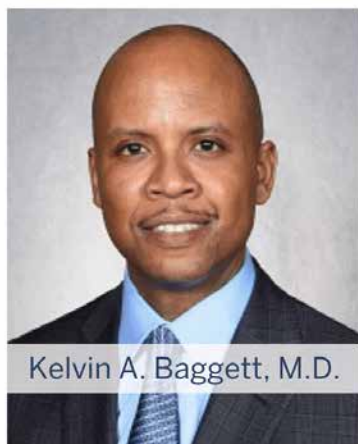
These achievements would not have been possible without the support of our donors, friends, advocates, and supporters. Your trust in us is what makes the difference to the communities we serve and allows us to maintain high benchmarking standards.

The Foundation has consistently maintained the highest status of financial and accountability standards with charity watchdogs, including our Program Expense Ratio.

2020 TOTAL EXPENSES



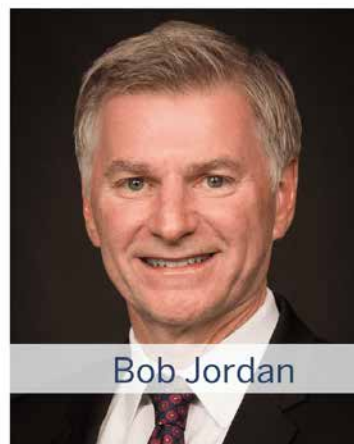
LEADING



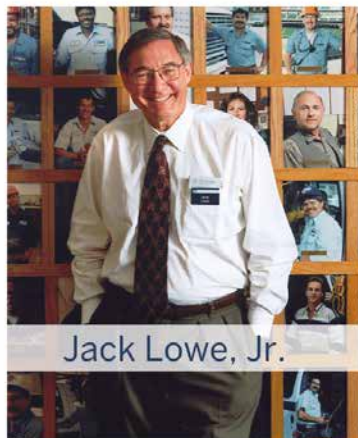
Kelvin A. Baggett, M.D.



Rod Jones



Bob Jordan



Jack Lowe, Jr.



Welcome,
New Trustees!



Brian Schultz

Board of Trustees

In September, we held a virtual Annual Meeting of the Board of Trustees. During the meeting, we introduced five new Trustees, who all bring a diverse set of skills and talents to the Board. We also gave our deepest thanks for the service of our Trustees who are transitioning to **Honorary status** this year.



James R. Huffines, Chairman of the Board of Southwestern Medical Foundation

COVID-19 Resources and Upcoming *Perspectives Magazine*

In addition to being a sustainable funding source for helping ignite medical progress, Southwestern Medical Foundation remains committed to providing fact-based information, updates, and resources to our community as the COVID-19 pandemic continues. Since 1939, supporting our community's leading scientists and researchers has been a core part of our mission and remains a key priority in paving the way toward a healthier tomorrow. Our **COVID-19 Resources and Updates page** continues to provide timely updates from credible sources. **UT Southwestern's Forecasting Model** for DFW, which is updated weekly, provides insights into community spread and transmission.

E-NEWSLETTER

In March 2020, Southwestern Medical Foundation launched a regular Trustee and Honorary Trustee e-newsletter to keep the community well informed on COVID-19 and other mission-focused news.

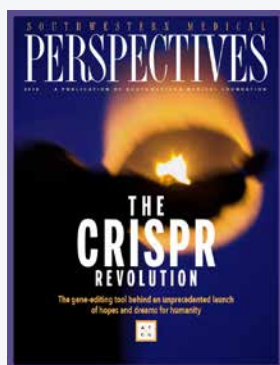


Under the leadership of UT Southwestern, our community contributed to new findings and insights about the prevalence of COVID-19 in our community through the **COVID-19 Prevalence Study**.

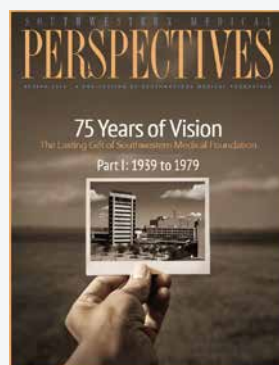
In 2021, we look forward to releasing our next issue of **Perspectives**, which will dive deep into the public health challenges faced during the pandemic, and bring perspectives from leading experts on many aspects of the challenges of COVID-19.

To receive the upcoming issue of *Perspectives* or to request a recent issue, please click the button below.

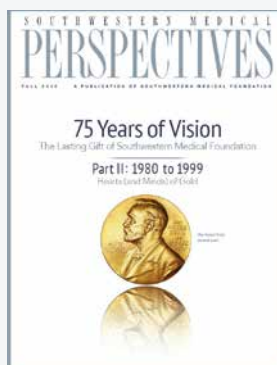
RECENT ISSUES OF *PERSPECTIVES*



Perspectives
The CRISPR Revolution



Perspectives
Part I: 1939 to 1979



Perspectives
Part II: 1980 to 1999



Perspectives
Part III: 2000 to 2015

JOIN OUR *PERSPECTIVES* MAILING LIST

120K

PEOPLE REACHED THROUGH
RECENT *PERSPECTIVES* ISSUES

CONVENING



Community Outreach

This year, we were impressed and heartened by the many ways in which our community members adapted to a changing environment by being open to new avenues of engagement and connecting with each other virtually. We had the privilege of hosting a total of 40 virtual events and meetings throughout the year.

In May, we hosted an engaging discussion in a virtual *Meetings of the Mind* session about mental health and resilience with UT Southwestern leaders including Drs. Mark Goldberg, Jennifer L. Hughes, and Ahmad Raza. During our *Meetings of the Mind* webinar, Drs. Goldberg, Hughes, and Raza discussed the challenges our society is facing while coping with the anxiety and uncertainty surrounding the COVID-19 pandemic, as well as strategies to overcome those challenges.

20,357,598

NUMBER OF IMPRESSIONS REACHED IN 2020

40

VIRTUAL MEETINGS AND EVENTS
PROVIDING COMMUNITY OUTREACH

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2020 Year in Review
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CONVENING



As The Cary Council celebrates its fifth year of impact in the Dallas community, we welcome its newest chair, Amanda George. Created in 2015, The Cary Council is a group of emerging young leaders who support and strengthen the work of the Foundation and UT Southwestern.

The Cary Council

In 2020, The Cary Council **celebrated its five-year anniversary and welcomed new leadership.** In September, The Cary Council held a virtual fall celebration to provide updates from previous grant awardees, introduce this year's grant awardees, and share a fun video of Steering Committee Member Grafton Ifill "passing the torch" as Michael Kahn transferred his Chair position to Amanda George. Under her enthusiastic leadership, we have no doubt that The Cary Council will continue inspiring the next generation of community leaders to invest in the medical progress we all seek to achieve.

Read more about The Cary Council's Signature event, An Evening with DocStars, and meet the 2020 DocStar grant recipients.



In February 2020, community leader and businessman Ken Hersch shared lessons he's learned along the path to success as part of The Cary Council's Learning from Leaders series.

\$450K

TOTAL AMOUNT OF GRANTS
AWARDED SINCE 2017

\$6.8M

ADDITIONAL FUNDING
SECURED BY DOCSTARS

INSPIRING



Supporting the Next Generation of Leading Physicians

As we look back at what was achieved in 2020, we are filled with optimism and remain inspired by our leaders' vision for a healthier tomorrow. Above all, what shines through is our community's ability to support, motivate, and instill hope in others.

We congratulated the **2020 Ho Din Award winner, Priyanka Gaur, M.D., M.P.H.**, a dedicated physician and passionate advocate for public health. Dr. Gaur is now completing her obstetrics and gynecology residency at Johns Hopkins Hospital.

Dr. Gaur and Richard E. Hoffman, M.D., M.P.H., continue to serve as leaders with voices that help educate and encourage us to make ever-increasing progress in public health.

THE GRADUATING CLASS OF 2020 RECEIVED

\$2M+

THROUGH 843 SCHOLARSHIPS AWARDED OVER THE PAST 4 YEARS

INSPIRING



Voices of Hope from Our Community

We watched as our partners and friends joined in a tremendous effort to spread their messages of hope and inspiration through our “In This Together” video series. We are grateful for those who continue to support this online movement by sharing the significance of being “in this together” today and always.

Our community’s support, combined with the expertise of leading physicians, researchers, and scientists, has led to remarkable strides in public health. As we look ahead, we take a moment to reflect on the inspiring stories of generous hearts and brilliant minds who shaped this year. Together, we progress.

INSPIRING



Clara Maass, Dr. Li Wenliang

While 2020 was a year full of opportunity for internal reflection, it was also a year that many were called to action.

We saw communities across our nation and globe stand up for each other and meet challenges with newfound resiliency. Looking to the past grounded us in understanding the sacrifice and courage necessary for progress, and stories of our modern health care heroes inspired us forward with a collective resolute spirit.

On the Old Parkland Campus where Southwestern Medical Foundation offices are and where Southwestern Medical College was founded in 1943, Harlan Crow has long displayed important reminders of our history and facilitated discourse around society's most complex current issues – one of which is the importance of public health. His connected view of the past, present, and future is one that we do not take for granted and we are tremendously grateful for his support.

INSPIRING



Portrait of Clara Maass in Southwestern Medical Foundation office.

In 2020, Mr. Crow commissioned a portrait of Clara Maass, an American nurse who dedicated most of her life to helping others and gave the ultimate sacrifice for humankind in 1901 when she volunteered to participate in research to find a cure for yellow fever and succumbed to the illness. This research, and Clara's courage, ultimately led to a successful vaccine. Mr. Crow also commissioned a sculpture of Dr. Li Wenliang, the fearless Chinese doctor who tried to warn others of the global threat posed by the coronavirus strain known as COVID-19, only to pass away from the virus shortly after.

INSPIRING



Harlan Crow with sculpture of Dr. Li Wenliang on Old Parkland campus.

Both pieces of art are timeless and permanent tributes to the power within each of us to make an impact and better our communities. They currently reside in the Southwestern Medical Foundation offices and are daily reminders of how we are truly **In This Together**.

"The value of health and happiness to an individual who is afflicted cannot be estimated... the value to a community of a higher standard of public health is incalculable."

- Dr. Edward H. Cary, Founder, Southwestern Medical Foundation