



SOUTHWESTERN MEDICAL FOUNDATION

2021 YEAR IN REVIEW

FORWARD TOGETHER

“Ours is a storied history of men and women who have lent their ideas and their energies and their treasures to create something greater than themselves – to build a city and impact the lives of millions of people they would never know.”

Kathleen M. Gibson

Our journey through 2021 marks a unique point in our shared history – it has been a journey filled with remarkable generosity and remarkable sacrifice and courage. We welcome 2022 with immense gratitude for the medical progress that you've made possible, and we appreciate your generosity.

Please join us for a look at memorable moments of progress experienced in 2021 as we celebrate all that has been accomplished and continue to move **forward, together.**



Campaign for the Brain

In 2021, many of our Trustees and Honorary Trustees supported the successful Campaign for the Brain to build the Peter O'Donnell Jr. Brain Institute at UT Southwestern Medical Center. In partnership with UT Southwestern on its top priorities, Southwestern Medical Foundation created a special impact challenge for Campaign for the Brain, offering Trustees an opportunity to maximize their gifts through matching funds. The Foundation offered \$12.5 million in matching funds which – in addition to Foundation direct commitments – created a \$25 million campaign gift.

The O'Donnell Brain Institute is well on its way to becoming one of the nation's leading institutes in neuroscience discovery and an international referral destination for patients needing the best care for brain diseases today.



The Foundation gave an initial gift to the Campaign for the Brain as part of its 75th Anniversary Celebration in 2015.

**SWMF COMMITMENT
TO CAMPAIGN**

\$25.0M

**SWMF MATCHING FUNDS
FOR CAMPAIGN**

\$12.5M



“It is very moving to see what is being accomplished already by new collaborations, facilities, and technologies at work at the O’Donnell Brain Institute. Peter challenged us to tackle this next frontier in medicine, and we are proud of the way UT Southwestern continues to step up to every new challenge our community faces.”

James R. Huffines
Chairman of Southwestern Medical Foundation



“We are deeply moved by our community’s strategic investments in our future and the leaders who so generously inspire the excellence we see today at UT Southwestern.”

Kathleen M. Gibson
President and CEO of Southwestern Medical Foundation

THANK YOU TO THE CAMPAIGN FOR THE BRAIN STEERING COMMITTEE

Robert Rowling *Chair*
Mary Cook
Harlan Crow
Bob Dedman
Kathleen Gibson

Nancy Halbreich
Linda W. Hart
Fred Hegi
James Huffines
Julie Kosnik

Todd Maclin
Lynn McBee
David Miller
Ross Perot, Jr.
Jeanne Phillips

Deedie Rose
Bonnie Smith
Bill Solomon
Rich Templeton
Peter Townsend

Board of Trustees

Members of our Board of Trustees continue to lead through challenging times, united in their deep dedication to inspire progress in medicine. In 2021, we welcomed six new Trustees, who all bring outstanding skills and talents to the Board.

Cheryl Alston

*Executive Director and Chief Investment Officer,
Employees' Retirement Fund of the City of Dallas*



"So honored to be part of Southwestern Medical Foundation, which serves as a catalyst for unleashing the power of collaboration and thought leadership to create innovative programs that elevate health care in the community."

Dawn Zierk

Community Philanthropist



"Southwestern Medical Foundation is an excellent steward of its assets. It has enabled innovative and significant projects and advocated for the needs of physicians, researchers, medical students, and other medical professionals. I am looking forward to supporting and advancing the capacity of this strategic organization."

Imran Kahn

Co-Founder and CEO, Verishop



"Joining the Board of Trustees at Southwestern Medical Foundation gives me the opportunity to put my technology and finance experience to work in an area I'm passionate about. I want to help the Foundation grow its portfolio and build on the incredible track record of supporting groundbreaking research and top-of-the-line medical professionals for more than 80 years."

Kathleen Wu

Partner, Hunton Andrews Kurth



"The dramatic growth of the North Texas region, combined with the COVID-related health care challenges we continue to face, means that the Foundation's work is crucial to the long-term economic health of this region. I'm excited to put my philanthropic, business, and legal experience to work on behalf of such an important institution."

Pilar Henry

Community Philanthropist



"By supporting science, research, and overall medical advances, Southwestern Medical Foundation provides immeasurable help to our community. I am honored to be a member of this Board and hope to help continue the great work that the Foundation has been doing for over 80 years."

Shonn Brown

Chief Global Litigation Counsel, Kimberly-Clark Corporation



"I am so grateful to have such an opportunity for impact through the Foundation. We must be passionate about driving excellence in innovation – but also equity in innovation. My hope is to build on the Foundation's mission to inspire progress in medicine for all by helping to shape and support the cutting-edge research happening right here in North Texas to positively impact our community."

Builders & Innovators

Our mission has been supported by exceptional individuals and businesses committed to building a medical center second to none, and driven to assure a sustainable future for medical progress. We are inspired by their generosity, which was an integral part of the impact we built together in 2021.



Terry and Bob* Rowling

Terry and Robert B. Rowling Fund in support of the Peter O'Donnell Jr. Brain Institute

\$25M+

**Chair, Campaign for the Brain.*



Lyda Hill

Lyda Hill Deanship of the School of Public Health & Distinguished University Chair in Biomedical Engineering

\$7.5M



Thompson Family

The Jere Thompson Family in support of the Peter O'Donnell Jr. Brain Institute

\$5M



Richard Hoffman, M.D., M.P.H.

Richard E. Hoffman, M.D., M.P.H. Scholarship Fund for Public Health

\$1.5M



Public Health

Trustworthy information is what grounds a community during uncertain times. UT Southwestern Medical Center continues leading with data-driven insights and guidance through their COVID-19 Forecasting Model, which is updated regularly and provides valuable information about trends and projections for the DFW region.

As a wide breadth of information is circulating about COVID-19 and its global impact, this has been a way to stay connected to reliable resources for updates and information. A **comprehensive list of resources** has been kept available to the public for this purpose.

As we move forward together, UT Southwestern is launching the new Peter O'Donnell Jr. School of Public Health to advance the field broadly through research and meet the need for an expanded workforce. With tremendous community support and a vision to embrace our region's diversity, eliminate disparities, and achieve optimal health for all, the new school will welcome its first class in the fall of 2023. This is the fourth school to be created at UT Southwestern and the first in the past half century. It will accompany the Medical School, School of Health Professions, and Graduate School of Biomedical Sciences on the UT Southwestern campus.



“Peter and Edith O’Donnell cared deeply about UT Southwestern and making a difference in the greater Dallas community. These two passions are inextricably linked in the Peter O’Donnell Jr. School of Public Health. We are proud to share a gift that honors the O’Donnells’ immeasurable legacy and makes a lasting impact on UT Southwestern and the communities of North Texas.”

William T. Solomon
President and CEO, O’Donnell Foundation



“I wanted to fund students because we want students who are very diverse to be the leaders of public health in the future. Rather than addressing a gift toward a particular disease, I wanted to help students just as I had been helped when I was starting my career. I have confidence that the Medical Center can produce outstanding graduates who go on to serve in their community.”

Richard Hoffman
M.D., M.P.H.



“Creating better health care starts with investing in the right people. Never underestimate the power of the right people being in the right places. UT Southwestern is already a leader in medical innovation, and with this new Peter O’Donnell Jr. School of Public Health, our region will continue to thrive.”

Lyda Hill
Founder, Lyda Hill Philanthropies



2021 Cary Council Early-Stage Grant Recipients Samuel John, M.D., Emily H. Adhikari, M.D., Owoicho Adogwa, M.D., M.P.H.

The Cary Council

The past year signaled tremendous growth in impact for The Cary Council, the next generation of change-makers dedicated to advancing early-stage research at UT Southwestern. The Cary Council hosted a drive-thru version of their innovative, signature fundraising event, *An Evening with DocStars at Home*. The interactive nature of the 2021 celebration had the same distinguishing characteristics of past *An Evening with DocStars* events.

The event's drive-thru format provided guests with **take-home science experiments** designed by former grant recipients and inspired by their research in their respective labs.

Thanks to sponsors and supporters of this special celebration, The Cary Council was able to **provide \$50,000 grants to each of three early-career researchers at UT Southwestern.**



An Evening with DocStars at Home

The Cary Council also reached a significant milestone in 2021 by establishing their first endowed gift through **The Cary Council Brain Fellowship Support Fund** for the **Peter O'Donnell Jr. Brain Institute at UT Southwestern**. The Fellowship was created in partnership with Southwestern Medical Foundation as The Cary Council's first endowed gift, which will forever support efforts to recruit and train the best and brightest for the O'Donnell Brain Institute.

TOTAL AMOUNT OF GRANTS
AWARDED 2017–2021

\$600K

ADDITIONAL FUNDING
SECURED BY *DOCSTARS*

\$7M



The Folz Family: Forward Together to a legacy of future discovery.

Sustainable funding means ensuring the future of medical progress so that the seeds planted by visionaries may come to fruition for decades to come. We are honored by your trust in our mission and celebrate reaching the milestone of \$1.3 billion in long-term pooled assets. These generous and thoughtful investments create the momentum and support needed to sustain medical excellence in our region and beyond.

USING ENDOWMENT FOR SUSTAINED IMPACT

 539 **ENDOWED FUNDS**

134 
CHAIRS

64 
PROFESSORSHIPS

40 
CENTERS

94 
RESEARCH PROGRAMS

61 
STUDENT BENEFITS

146 
OTHER PRIORITIES

GENEROSITY + STEWARDSHIP = IMPACT

\$949M **TOTAL DONATIONS RECEIVED SINCE 1939 (EXCLUDING LAND)**

\$779M **TOTAL GRANTS AWARDED SINCE 1939**

\$1.3B **NET ASSETS AS OF DECEMBER 31, 2021**

2021 GIVING

\$28.9M
TOTAL CONTRIBUTIONS FOR 2021

643
TOTAL NUMBER OF DONORS

Thanks to successful fundraising campaigns, the generosity of our community, achieving the Pickens Endowment Fund goal in 2019, and a continued focus on expertise in investment stewardship, the Foundation has experienced growth in both available grant dollars and the lasting impact made.

FINANCIALS

\$1.3B

LONG-TERM POOLED ASSETS

21.1%

LONG-TERM INVESTMENT PORTFOLIO PERFORMANCE

PERFORMANCE	AS OF 12/31/2021	3 YR.	5 YR.	10 YR.	SINCE INCEPTION
INVESTMENT PORTFOLIO	21.1%	16.7%	12.1%	9.8%	8.6%
BROAD (LIQUID) POLICY INDEX	16.2%	14.7%	10.1%	8.2%	7.8%

CHARITY WATCHDOG RATINGS



Financial strength and dedication to transparency continue to earn Southwestern Medical Foundation a Candid (formerly GuideStar) Platinum Seal and Charity Navigator 100/100 Encompass Rating.



Supporting Health Care Heroes

Inspiring acts of leadership defined 2021. The tremendous service UT Southwestern continues to provide to our community during a time of public health challenges has been strengthened by the generosity of many. Thanks to our community, more than \$6.19 million has been raised to support our health care heroes. Because of these gifts, frontline health care workers are getting the resources and support needed to continue fighting against COVID-19. This includes more than 33,000 meals delivered, and donations of much-needed personal protective equipment (PPE) such as face masks, face shields, and gloves.



COVID-19 Response Fund

TOTAL RAISED

\$6.19M



Ho Din Award Winner Dr. Natasha Houshmand

Supporting the Next Generation of Leading Physicians

In May 2021, Dr. Natasha Houshmand received the Ho Din Award during UT Southwestern Medical School commencement ceremonies. Instituted by the Foundation in 1943, Ho Din recognizes those who embody the qualities inherent in all great physicians – medical wisdom, human understanding, and compassion. Dr. Houshmand is now completing her residency training at the Johns Hopkins University School of Medicine.

MEET OUR 2021 HO DIN AWARD WINNER



What's Next?

Leading the Conversation on Health

October Conversation: Mental Health

Community leaders and health professionals will share updates on promising community impact in mental health today and for the future.



An Evening with DocStars 2022

November 3

The Cary Council will host their signature fundraising event on the UT Southwestern campus. Additional event information will be coming soon.



Pegasus Park

Coming Soon

Catalyzed by the vision of Lyda Hill Philanthropies and developed by J. Small Investments, Pegasus Park has reimagined an oil industry campus into a 23-acre, future-focused ecosystem in Dallas, Texas, that encourages collaboration, biomedical innovation, and social impact. We look forward to sharing more about the impact of Pegasus Park as Dallas establishes its growing footprint in biotech and innovation.



Perspectives: COVID-19 and the Future of Public Health

Coming Fall 2022

The next issue of *Perspectives* 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.



[JOIN OUR PERSPECTIVES MAILING LIST](#)

Your generosity inspires us.

We are heartened by the trust people like you have put in our mission and are inspired by our passionate supporters and donors. Thank you for making our favorite moments from this year possible. Your support is an integral part of our growth.

Stay connected with us by subscribing to our e-newsletter.

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