



**Southwestern
Medical
Foundation**

2019 YEAR IN REVIEW

*This is what progress
looks like.*

LEADING



Our present times remind us of the challenges we have faced together for more than 80 years. Throughout this time, the Foundation advanced and inspired tremendous progress in medicine. As each daunting need and challenge emerged, it was with vision and resolve that our leaders assured the progress our community required and deserved. We see the fruits of these labors today in the tremendous medical advancement that has been made in our community since 1939.

In 2019, we paid tribute to the lasting legacy of our outgoing Chairman of the Board, **Robert B. Rowling**, celebrating his five years as Chairman and his continued dedication to the mission as Chair of the Campaign for the Brain at UT Southwestern. We welcomed a new Chairman, **James R. Huffines**, who has served in leadership as a Trustee since 2011. The Foundation also welcomed four new outstanding Trustees: **Timothy P. Costello**, **Sarah K. Miller**, **Matthew S. Ramsey**, and **Sam L. Susser**, and 11 new Honorary Trustees.

BOARD OF TRUSTEES

New Chairman of the Board

James R. Huffines

New Trustees

Timothy P. Costello

Sarah K. Miller

Matthew S. Ramsey

Sam L. Susser

Moving to Honorary Trustees

Gil J. Besing

Stephen Butt

Joseph M. "Jody" Grant

Hunter L. Hunt

Tom Luce

Rena M. Pederson

Michael S. Rawlings

Stephen H. Sands

George E. Seay, III

Carol R. West

Kneeland C. Youngblood, M.D.

SUSTAINING



Thanks to the visionaries and families who supported our mission, Southwestern Medical Foundation helped establish a standard of medical excellence in our region, a transformation that would not have been possible without the unwavering support of our donors and advocates.

Our community has generously committed to sustaining our mission by endowing essential research, scholarships, and faculty support for decades. The Foundation has grown significantly in size and impact through growth in both current giving and endowed giving.

USING ENDOWMENT
FOR SUSTAINED IMPACT

 503 ENDOWED
FUNDS

129 
CHAIRS

59 
PROFESSORSHIPS

38 
CENTERS

83 
RESEARCH PROGRAMS

51 
STUDENT BENEFITS

143 
OTHER PRIORITIES

GENEROSITY + STEWARDSHIP = IMPACT

\$907M TOTAL DONATIONS RECEIVED SINCE 1939 (EXCLUDING LAND)

\$696M TOTAL GRANTS AWARDED SINCE 1939

\$1B NET ASSETS AS OF DECEMBER 31, 2019

FINANCIALS

\$964M

LONG-TERM POOLED ASSETS

14.5%

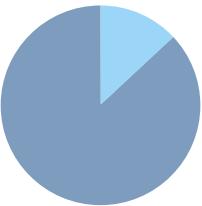
LONG-TERM INVESTMENT PORTFOLIO PERFORMANCE

PERFORMANCE	AS OF 12/31/19	3 YR.	5 YR.	10 YR.	SINCE INCEPTION
INVESTMENT PORTFOLIO	14.5%	8.4%	5.7%	7.5%	8.0%
BROAD (LIQUID) POLICY INDEX	20.2%	8.8%	6.0%	6.9%	7.5%

2019 CONTRIBUTIONS

\$17M

2019 TOTAL EXPENSES



13% Operating Expenses
87% Grants

The year 2019 was a great year to celebrate the legacy of **T. Boone Pickens** and his generous commitment to endowing lasting progress in medicine. During the year, Southwestern Medical Foundation and UT Southwestern committed funds to bring the T. Boone Pickens Endowment Fund to \$500 million, resulting in a new endowment to sustain excellence at UT Southwestern.

PICKENS ENDOWMENT FUND

\$500M 

FOUNDATION ASSETS

\$1B

INFORMING



Advancements in gene editing, buoyed by the discovery of CRISPR technology that enables precise editing of the human genome, have put scientists at the cusp of solving some of mankind's most devastating and baffling disorders.

In December, Southwestern Medical Foundation unveiled its latest *Perspectives* issue, "*The CRISPR Revolution*." The latest edition of the Foundation's magazine features the gene-editing technology of CRISPR and its revolutionary impact on humanity. The magazine includes contributions from 15 global leaders, providing deep insight into the history, science, ethics, and dilemmas surrounding a revolutionary new technology.

You can get a preview of this issue's contents and request a free copy on our microsite at **CRISPREVOLUTION.ORG**.

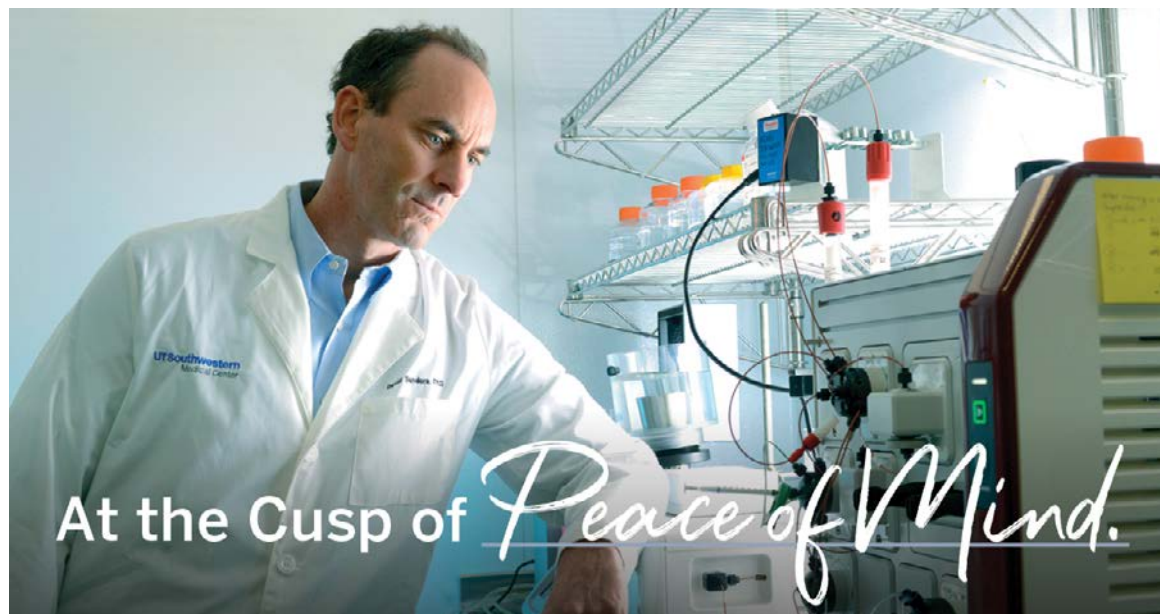
GLOBAL EXPERTS PROFILED

15

PEOPLE REACHED

30K+

CONVENING



Alzheimer's disease, a progressive, irreversible brain disorder that destroys memory and other vital mental functions, has touched the lives of families everywhere. Now, a cure may be possible within our lifetimes.

As a 501(c)(3) organization, serving the public is both our duty and privilege. In addition to providing funding to advance progress in medicine, the Foundation seeks to convene broad audiences at the forefront of medical knowledge. These in-person and online discussions inspire us forward, together.

On October 1, 2019, Southwestern Medical Foundation continued its speaker series, Leading the Conversation on Health. "On the Cusp: Innovation and Commercialization in Neurodegenerative and Neuromuscular Disease" at UT Southwestern Medical Center was moderated by **William T. Dauer, M.D.**, the inaugural director of the **Peter O'Donnell Jr. Brain Institute** at UT Southwestern. Speakers **Marc Diamond, M.D.**, and **Eric Olson, Ph.D.**, delighted the audience with their discussion of breakthroughs in innovation.

IMPRESSIONS ACROSS
SOCIAL AND WEB

13.4M

EVENTS PROVIDING
COMMUNITY OUTREACH

12

INSPIRING



Growing up in Nassau, Bahamas, Grafton Ifill was one of the top junior sprinters in the world. Today, he brings that same tenacity and determination to his role on The Cary Council's Steering Committee.

Through engaging programming like the Learning from Leaders speaker series and behind-the-scenes experiences at UT Southwestern, The Cary Council made substantial progress in continuing engagement with a new generation of community leaders. The Cary Council experienced significant growth, building momentum leading up to its five-year anniversary in September 2020.

Through their signature event, *An Evening with DocStars*, The Cary Council supports young investigators at UT Southwestern, or "DocStars," who are in the earlier stages of leading-edge research. Funds raised from the event are awarded as grants to "DocStars" in order to further their promising work.

NUMBER OF MEMBERS

130

TOTAL AMOUNT GRANTED
SINCE 2017

\$300K

ADDITIONAL FUNDING
SECURED BY DOCSTARS

\$4.3M

BY LEVERAGING DOCSTAR GRANTS AS A
SOURCE OF CREDIBLE SEED FUNDING

INSPIRING



Our 2019 Ho Din Award winner, Dr. Bethany Werner, was a manager and a regular volunteer at the UTSW Office of Global Health's Agape Clinic, providing much-needed medical care to disadvantaged populations in East Dallas.

In 2019, the Ho Din Award was presented to **Dr. Bethany Werner**. The **Ho Din Award**, instituted by Southwestern Medical Foundation in 1943, recognizes those who embody the qualities inherent in all great physicians — medical wisdom and human understanding. It represents the ideals and aspirations on which the school was built and continues to symbolize the type of doctor UT Southwestern seeks to educate.

SCHOLARSHIPS AWARDED
IN 2019

232

INCREASE OVER 2018 IN
SCHOLARSHIP DOLLARS AWARDED

18%

