

# Society of Women Engineers Board of Trustees

## STAKEHOLDER BRIEFING

July 1, 2019 – June 30, 2020

The Board of Trustees (BOT) manages the assets of the SWE Endowment Fund Inc and the SWE Reserve Fund.\* The group of 8 trustees is elected by the society membership.

\* As of 6/22/20, The Reserve Fund is managed by the SWE Investment Committee, made up of representatives from the BOT, SWE Board of Directors, and SWE Headquarters.

### BACKGROUND

#### SWE Endowment Fund, Inc. (SWE-EFI)

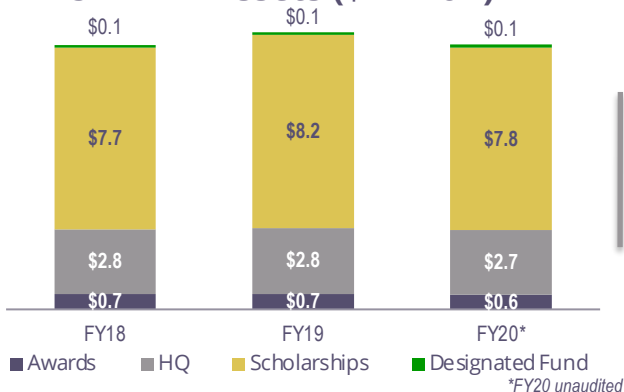
- Established in 2005 with endowments received beginning in 1956
- Funded by Life memberships, bequests and other donations
- Includes HQ, Awards, Scholarships, and Designated Funds

#### SWE Reserve Fund (SWE-RF)

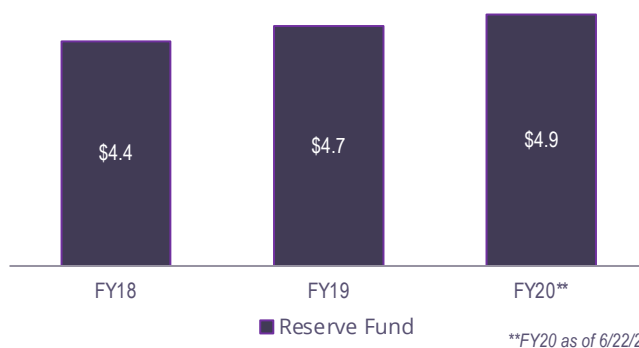
- Established in 1982 to ensure long-term financial stability
- Controlled by the SWE Board of Directors
- Amended March 2020 by the Senate to transfer fund management to Investment Committee established by BOT
- Target balance of the Reserve Fund is a percentage of SWE's overall general operating expense balance

### FUND BALANCES

#### SWE-EFI Assets (\$Million)



#### SWE-RF Assets (\$Million)



### IMPACT

#### In FY20, SWE EFI Provided

**\$286,996**

119 Scholarships

**\$112,315**

General Support for SWE HQ

**\$26,210**

217 Awards

**\$4,185**

3 Designated Fund Distributions



#### New scholarships for Fall 2020

- Wolfs Family Scholarship
- Wendy Landwehr Memorial Scholarship
- Dr. Paula Marie Stenzler Legacy Scholarship for Engineering
- Roberta Marie Stinson Scholarship
- SWE Ohio State Section Scholarship



#### New scholarships for Fall 2021

- Detroit SWE 4 Life Endowed Scholarship
- SWE-OC Endowed Scholarship
- Freeman Family Scholarship
- Woon Family Scholarship

### JOIN US

#### BOT - WE WANT YOU!



- Do you have experience with investing? Are you interested in the markets?
- Check out our Webinar – SWE Board of Trustees: Role and Function

#### FY21 TRUSTEES



Top Row From left to right:

- Mary Studlick (Treasurer FY20-FY22)
- Sandy Postel (Chair FY19-FY21)
- Janis Mantini (Secretary FY21- FY23)
- Ester Barbuto (FY20-FY22)

Bottom Row From left to right:

- Cassi Janakos (FY19 – FY21)
- Paula McDonald (FY20-FY22)
- Deb Stromberg (FY21 – FY23)
- Kim O'Rourke (FY21 – FY23)

Contact Us:

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