

FALL 2012

# HERITAGE

OKLAHOMA STATE UNIVERSITY FOUNDATION OFFICE OF GIFT PLANNING







# WELCOME TO THE FALL 2012 ISSUE OF THE HERITAGE NEWSLETTER

## Greetings from Stillwater!

Oklahoma State University recently announced it had set an enrollment record with 36,551 total students systemwide. That includes a freshman class of 4,289, which is a state record as well. The academic quality of this group is also historic. Consider that 29.4 percent have an ACT score of at least 27; 15 percent have a perfect 4.0 GPA; 27.54 percent were in the top 10 percent of their high school class; and 337 were valedictorians. Clearly today's new members of the orange and black family are tomorrow's leaders.

Many of our students receive scholarship support at some level, just as a lot of you did while you were students. In fact, student support is the top fundraising priority for the university and the OSU Foundation. This issue of the Heritage newsletter shares some stories about the impact such support has. In addition, many donors have found funding scholarships a meaningful way to carry on a family legacy.

We look forward to thanking such donors and many others who have included OSU in their estate plans during the Heritage Society event in the spring. If you are a member of the Heritage Society, we hope you will join us for special campus tours followed by a festive gathering. Stay tuned in the coming months for more details.

If you have provided for Oklahoma State in your estate plans but have yet to share that news with us, we encourage you to do so. As you consider opportunities to include OSU in your charitable planning, please know the Office of Gift Planning is here to assist in any manner possible. We can provide information to assist you and your professional advisors. Ben, Melinda, Nina and I look forward to being of service. For more information, we invite you to call us at 1-800-622-4678 or visit [OSUgiving.giftlegacy.com](http://OSUgiving.giftlegacy.com).

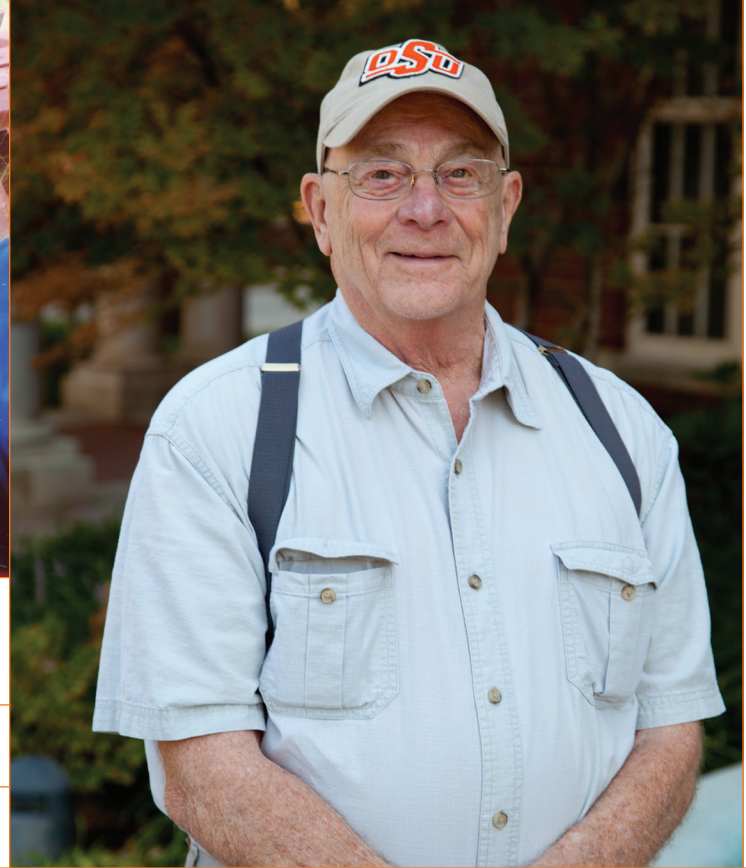
## THANK YOU!

*David*

**DAVID MAYS**  
Senior Associate VP of Gift Planning

## OSU FOUNDATION GIFT PLANNING TEAM

Nina Phipps, Melinda McAfee, Ben Stahmann and David Mays



# ROMSHES

## CONTINUE FAMILY LEGACY

## THROUGH SCHOLARSHIP

**Richard and LaVonne “Red” Romshe** had no children, so they found another way to carry on the family legacy.

Since 1990, they have provided annual support for the Franklin and Margaret Romshe Endowment Fund, which is named for Richard's parents. The fund honors Franklin's career as an OSU horticulture professor through scholarships for horticulture and landscape architecture majors. The Romshes consider the recipients their “adopted” children.

Before LaVonne lost her bout with cancer in July, the couple had decided to enhance the scholarship by leaving Richard's retirement fund to OSU. He is also exploring other ways to contribute through his estate.

**“Putting our money into education is the best thing,”** Richard says. **“We obtained a little bit of money over the years. If there is anything left when I'm done with it, and someone else can benefit from it, I'm more than happy to do that. That is why I'm doing this, to help other people.”**

The fund has carried Franklin and Margaret's names since its creation, but Richard is adding LaVonne's and debating whether he'd like his own added when he passes.

“I didn't even care if our names were on it,” Richard says. “But the more I think about it, the more I realize that if you add more names to it, it's a tradition that grows.”

Richard did not follow in his father's footsteps by working in academia due to his struggles with what he now knows is dyslexia. However, the can-do attitude Franklin taught him helped Richard develop ingenious methods for overcoming his reading and writing challenges during a successful career as a United Airlines mechanic.

**“You set up plans and a lot of obstacles come along to try to disrupt those plans,”** Richard says. **“That's fine. If you have a goal that you really want to do, the focus is that goal. Bring it on. You plow right through it. You don't stop because it's raining.”**

Richard says he feels “very, very, very good” about using the assets he and LaVonne accumulated over a lifetime of hard work to benefit others.

“If I can help a few kids go to school since I didn't have children, then the family legacy continues on,” Richard says. “I just feel like something has been accomplished now.”





# But for the compassion of a young mathematics professor...

**OSU alumni and Heritage Society members Tracy and Karen Bair** visited campus in fall 2010 on a mission: connect with OSU Foundation staff to talk about their gratitude for a young mathematics professor at OSU in 1969, and discuss charitable estate planning for a scholarship fund. Valuing higher education is a Bair family tradition.

In the spring of 1939, Tracy’s father, John Bair, had enlisted in the Navy to ensure that his siblings would have a better life. He lied about his age, and, unbeknownst to his parents, caught a bus to St. Louis. He later wrote his parents to apologize and assure them he would send his check home each month “to help pay for my brothers’ educations.” He kept his promise, and when he married Elva and had children of his own, he ensured that each of them made it to college as well.

Tracy and his siblings attended OSU in the fall of 1964, Tracy having graduated from Tulsa Edison High School at 16. To pay for his schooling, Tracy worked one full-time job and one part-time job at the TG&Y department store. He married Karen

Wills his senior year, working and studying many hours to complete his degree in mathematics and statistics. He also earned a commission in the Army as a 2nd lieutenant. But just two days after the January 1969 commissioning ceremony, Tracy received an unexpected letter from the OSU Registrar: the degree would not be awarded because he had not passed an advanced abstract algebra class. Karen urged her husband to go to the professor to ask if anything could be done.

“I headed back to campus with reluctance,” Tracy said. “I did not know the professor, Dr. John Jobe, well, and I certainly knew that I didn’t understand the subject. I did not see any good outcomes.”

But Jobe listened to Tracy’s explanation: that he had to stay after work to mop and strip the wax from the floors at the two TG&Y stores the night before the 7:30 a.m. final examination. And, because of his commission, he had an obligation to the Army almost immediately. Failing to graduate could have meant deployment to Vietnam in the infantry without a chance to complete his education or train in another area of the service. Jobe offered to let Tracy retake the examination

provided he would study. Tracy pored over his notes for 48 hours before the test, and then waited two painfully slow days for the results. Finally, the phone call came from the Mathematics Department: he had passed.

Tracy became a cryptologist and retired from the Pentagon in 1989 as a lieutenant colonel. He earned a degree in divinity and served as a Methodist minister for 20 years. He was also dean of a business school in Honduras.

A lifelong student of business, mathematics, statistics, and theology? Yes. Grateful to OSU, Jobe and family? Yes. The endowed scholarship, to be funded through their estate gift, will serve many students who, like him, are working while studying due to financial need. They too can



“**We established our charitable trust to honor John and Elva Bair, and Kenneth and Mildred Wills, and their shared vision for higher education. We also want to honor the compassion of Dr. John Jobe, who made such a difference in our lives.**”  
- Tracy Bair -

begin a family tradition of achieving higher education because of the Bair family’s commitment.

“Karen’s and my parents both made real sacrifices to make college a possibility for their children,” Tracy says. “We established our charitable trust to honor John and Elva Bair, and Kenneth and Mildred Wills, and their shared vision for higher education. We also want to honor the compassion of Dr. John Jobe, who made such a difference in our lives.”

Through their estate plan, the Bairs have committed to help future generations of students while creating a legacy in honor of those individuals who impacted their lives in such meaningful ways.



# GENEROSITY LEAVES A LASTING IMPACT

**OSU** is fortunate to benefit from people who support the institution through planned gifts. These donors make an impact by supporting future generations through higher education. Their philanthropy places them among the more than 79,500 Branding Success donors who have combined for more than \$927 million in gifts and commitments.

Endowments create a legacy that lives on long after the donor passes away. Their generosity continues to support OSU in perpetuity.

**Max Katz** was discreet about his philanthropy, asking to remain anonymous until he passed. The College of Agricultural Sciences and Natural Resources scholarship endowment he established in life was boosted by his 2010 estate gift. The Max Katz Memorial Scholarship Fund has supported more than 40 students since 2001, and most recently funded a student's semester in Honduras.

Megan Morris, plant and soil sciences senior, says that was an experience she's wanted to pursue since her freshman year. She struggled to find financial assistance until becoming a Katz Scholar. She is studying corn, focusing on comparisons of crops through cultural and scientific methods and how they compare to crops in America.

"Not only has this gift impacted my life, but through my work this gift is reaching others as well," says Morris. "I am very thankful for alumni who want to invest in students, giving us the opportunity to experience OSU the same way they did."

**Seldom do planned gifts** have the combined element of surprise and impact of that left by alumnus John Brammer, who bequeathed his

retirement fund to the School of Mechanical and Aerospace Engineering. The John Brammer Endowment and Professorship funds are attracting premier faculty by funding professional development, equipment, programs, student assistants, study abroad and other teaching and research expenses.

Afshin Ghajar, the Brammer Professor, is one of many beneficiaries of Brammer's philanthropy. Ghajar is enthusiastic about the opportunities this gift is providing for OSU and the world as a whole.

"The funds have allowed me to take one of my best Ph.D. students to the American Society of Mechanical Engineers Conference in Puerto Rico this past summer," says Ghajar. "I have had the opportunity to share this research program with colleagues across the world."

Ghajar is a regent's professor and director of graduate studies in the School of Mechanical and Aerospace Engineering, where he earned all three of his degrees. This professorship has supported Ghajar's trips to several prestigious international conferences to present his research on two-phase flow heat transfer.

"We are able to let the world know OSU is a force to reckon with. This gift has made it possible to attain goals we were unable to accomplish before. I am thankful for the support that is leaving a wonderful legacy and branding success in the lives of our students," says Ghajar.

**Endowments** are referred to as "gifts that keep on giving." The Hunter Stone Endowed Scholarship Fund continues to grow as oil and gas royalties accrue after E. Hunter Stone II's 2006 estate gift. The oil and gas businessman amassed an interest in more than 100 wells spanning six



Afshin Ghajar



Megan Morris



Timothy Stambolis

states and 36 counties. His legacy is enriching the lives of students today.

Timothy Stambolis is a family man who works 40 hours per week while carrying a full schedule toward an electrical engineering technology degree. The Hunter Stone Scholarship eases his financial stress, allowing more time for studying and family.

"I consider this gift an investment in me," says Stambolis, a Claremore native. "I'm going to do my best to pay it forward."

Katz, Brammer and Stone were all passionate about supporting future generations through loyalty and devotion to the university. Though all three have passed, their impact is felt today by students receiving new opportunities to pursue a high-quality education at OSU.

## SCHOLARSHIP SPOTLIGHT

Alumna and educator **JAN JEWELL** is passionate about special education. In fact, the majority of her 16 years in the classroom was devoted to helping middle school children with special needs.

Now she and her husband, Kirk, support future special education teachers, like master's student **KALI BELL**, by generously giving to the Jan Jewell Endowed Scholarship. They have also joined the Heritage Society with a gift through their estate for the endowment.

**"I get to help students go through school, and in turn they get to go help other students,"** Jan Jewell says. **"I can't think of anything else I would rather leave as my legacy."**



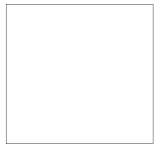




THE CAMPAIGN FOR OSU.

OKLAHOMA STATE UNIVERSITY FOUNDATION  
P.O. Box 1749 / Stillwater, OK 74076-1749

ADDRESS SERVICE REQUESTED



## DOES YOUR **WILL** WORK?

We at the Oklahoma State University Foundation want you to have the peace of mind that comes from knowing you have a valid estate plan. We want you to have a will that works well for you. And, frankly, one that works for us by including a bequest to the OSU Foundation.

When you name the **Oklahoma State University Foundation** in your will or living trust, you make a crowning gift to OSU. Your Last Will and Testament declares that you believe in OSU's mission and you want a portion of your assets invested in this worthy cause.



**If you plan to share your legacy with the OSU Foundation through a will, trust, insurance policy, retirement plan or other estate provision, we invite you to join the Heritage Society. When we know about your generosity, we can meet your wishes for its use. For more information, contact the Office of Gift Planning at 1.800.622.4678 or visit [OSUgiving.giftlegacy.com](http://OSUgiving.giftlegacy.com).**