

# engaged



A newsletter for Alumni & Friends

Volume No. 4 / Winter 2004

# A Letter From the Chair



John Decker, *Chair, Board of Trustees  
MSU-Billings Foundation*

**T**he new year has come and gone, and we are well into 2004. Now comes the anticipation of spring and all the outdoor activities it offers.

Springtime is also a very exciting time at Montana State University-Billings. As the grass greens up and the leaves return to the trees, spring brings the promise of renewal and change and helps electrify the mood on campus.

The forerunners of spring remind us of our connection with nature and the world around us. In this issue of *Engaged*, we focus on our connections with others and with MSU-Billings. Involvement and volunteerism are the cornerstones of the MSU-Billings Foundation. We would not be able to provide enhanced opportunities for MSU-Billings students without the

hundreds of volunteers who work on the Wine and Food Festival, the Annual Drive for Excellence, and the Alumni Golf Tournament.

I hope you'll enjoy reading about a few of the many volunteers who make this University great, such as Jane and Joe Howell, Mike and Cara Schaer, and Timothy and Margaret Sheneman. Please take a moment to consider how you can get involved. As a veteran Wine and Food Festival supporter, this is the time of year I begin to imagine the large white tent on Normal Avenue signaling Festival Week! I continue to be amazed at how enjoyable this event is. The Wine and Food Festival is truly a labor of love for those volunteers who become involved with it: love for the community in which we live, for the

University for which it raises valuable funds, and a love and appreciation of good food and the fruit of the vine.

It is a winning combination and only one of many activities that happen each year at MSU-Billings in which you could get involved.

So get involved! Call the Foundation today at (406) 657-2244! It is fun, and the result is in all of our best interests – support for the students of MSU-Billings.

Cheers,

A handwritten signature in blue ink that reads "John Decker".

**John Decker**  
Chair, Board of Trustees  
Montana State University-Billings  
Foundation

# Jane & Joe Howell

reaching out every day



“Life is more than what you do for a living” is the rule by which Joe and Jane Howell have tried to live. Through the years, these two members of the Montana State University-Billings campus community have changed thousands of lives by embracing their rule for living: reaching out, stepping far beyond the call of duty, and immersing themselves in a variety of important causes, both on and off campus.

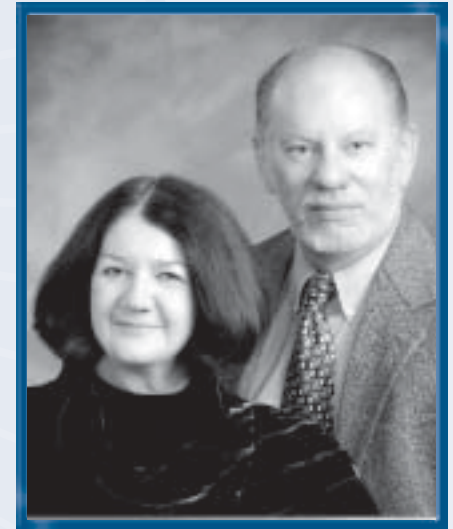
The Howells moved to Billings in 1980 when Joe began teaching in the Eastern Montana College Math Department. Jane began working in the campus library in 1982. Today, Joe, who holds a PhD in math from the University of Denver and earned his Bachelor’s in math and philosophy from the University of Bristol in England, is Chair of the Math Department. A native Brit, Jane received her Master’s in Library Science from the University of Denver and her Bachelor’s in chemistry from the University of Leeds in England. She is now Director of Library Services at MSU-Billings.

The impact this energetic, determined pair have made on campus is immeasurable. The MSU-Billings Foundation’s Wine and Food Festival and Annual Drive for Excellence would not be what they are today without the contributions of time and talent the Howells make year after year. Jane is especially proud of her

work to develop the Library Excellence Fund. This endowed fund was established to provide a perpetual source of financial support for the library. Through her work with individual donors and several fund raisers, the Library Excellence Fund totals nearly \$1 million. In recent years, this endowment has helped mitigate the lack of sufficient state funding for university libraries. Some would say a library is the heart of the campus, the place where all students pursue knowledge, conduct research, and grow intellectually. Those who know Jane Howell will tell you she is the soul of the library at Montana State University-Billings.

The Foundation’s Wine and Food Festival has netted almost \$1.5 million since its inception in 1993. Last year alone, the Festival netted \$220,000 for student scholarships and University programs. The Howells have been deeply involved with the Festival since its early days, and have helped it grow into the spectacular event it is today. Joe served as emcee for the Saturday evening live auction for three years, impeccably pronouncing the names of French wines and Italian wineries. Jane and Joe have repeatedly chaired the committee that operates the Festival Wine Store. Their dedication to giving back to their University also extends to the Annual Drive for Excellence. Jane has chaired the Combined Campus Campaign and Joe has been an Annual Drive volunteer for the last eight years.

*(continued on page 2)*



Jane & Joe Howell

Joe and Jane don't limit their involvement to activities on campus. Their community service is equally impressive. Joe is involved in Math Counts, a program in local middle schools to advance skills in and foster appreciation for mathematics. Jane is a member of the American Association of University Women, served as Vice-President for the ACLU in Montana, and has represented Montana at the American Library Association. They are both active in politics and lend their time and talents to support education issues.

Believing in supporting the organization they work for and the community they live in, the Howells have also made a personal financial commitment to support the University. They recently established a \$40,000 charitable remainder unitrust to benefit the Library and the Math Department, and pledged an additional \$10,000 to the Annual Drive over the next five years.

Joe and Jane Howell believe in the promise of education and have devoted their lives to ensuring quality educational opportunities at Montana State University-Billings. We thank them for their ongoing commitment to this great University.

## Charitable Remainder Unitrust

A Charitable Remainder Unitrust (CRUT) is a very efficient way of giving a gift to Montana State University-Billings Foundation for the benefit of students, campus projects, or other special needs of the University. A CRUT provides significant benefits to the donor(s):

1. It provides a lifelong income.
2. Donors may recognize significant immediate tax savings by contributing appreciated securities and/or real estate.
3. Estate taxes may be reduced or eliminated entirely.
4. MSU-Billings Foundation will receive a gift in the future.
5. Through proper planning, tax-free proceeds can be directed to heirs.
6. A CRUT qualifies for the 40% Montana tax credit.
7. Donors may name endowed funds for loved ones or designate funds for areas of special interest to them, such as the College of Education and Human Services or Athletics.
8. Trust assets may be protected from long-term care confiscation.
9. Donors can have some control throughout the life of the trust.

A 72 year-old couple in the 25% income tax bracket, with highly appreciated stock – fair market value of \$100,000 and a cost basis of \$25,000. Stock is transferred to Charitable Remainder Unitrust (CRUT). CRUT makes payments to Donors for life. Balance remaining in CRUT is then given to MSU-Billings Foundation at Donors' passing.

	Sold, No Gift	CRUT
Capital gains taxes	\$11,250	\$0
Amount in Account	\$88,750	\$100,000
Income per year	\$4,400	\$5,004
Federal Tax Gift Deduction	\$0	\$45,072
Savings from Deduction (25%)	\$0	\$11,268
MT Tax Credit	\$0	\$18,029
Capital Gains Saved	\$0	\$11,250
<b>Total Savings</b>	<b>\$0</b>	<b>\$40,547</b>

To see how you might be able to use a CRUT in your financial planning, contact Dick Buckley at MSU-Billings Foundation, 406-657-2244 or email to [rbuckley@msubillings.edu](mailto:rbuckley@msubillings.edu).

Or, if you prefer, include your name, address, and telephone number on a slip of paper, put it in an envelope and drop it in the mail to: Dick Buckley, Development Officer, MSU-Billings Foundation, 1500 University Drive, Billings, MT, 59101. Requests will be held in strictest confidence.

# MSU-Billings Students making an impact in the community



## Love and Learning – Margaret and Timothy Sheneman

**M**argaret Wang and Timothy Sheneman found more than small classes, exceptional faculty, and high academic standards at Montana State University-Billings – they found each other. Both double majors in biology and chemistry, Margaret and Timothy found friendship and love over test tubes and beakers. When asked how they met, Margaret said, “We met in biology class and were instant friends. Our individual desires to serve God and help others brought us together.” The happy couple’s similar interests and drive for excellence led them to MSU-Billings and to each other.

Margaret and Timothy grew up in Billings and have always been involved in the community. As a high school student, Margaret volunteered at St. Vincent Hospital, the Rescue Mission, ZooMontana, Billings Christian School, and Cornerstone

Community Church. Margaret remains deeply committed to her Christian background and continues her volunteer work despite her heavy class load. Timothy was a volunteer at his church, as well, and was a part of the Postponing Sexual Involvement Program in high school. In addition to volunteering, Timothy is involved in athletics, including track and cross country.

College has been another forum where these two dynamic individuals shine. Margaret currently holds a 3.96 GPA and, as one of the top incoming freshmen in her class, she received the 2001-2002 Chancellor’s Scholarship, Haynes Foundation Scholarship, and John Weinschrott Memorial Endowed Scholarship. Margaret also received the Haynes Foundation and the Zonta Club of Billings Book Scholarships for the 2002-2003 academic year. She received the

Haynes Foundation Scholarship again this year. In 2000, Timothy also received the Haynes Foundation Scholarship and is the recipient of the Wine Festival Recognition and Rob McCarvel Memorial Scholarships for the 2003-2004 academic year. Currently, Timothy holds a 3.44 GPA. He was awarded NCAA Division II All Academics honors and was named most valuable runner on the cross country team.

Margaret and Timothy were married on May 31, 2003, in Billings. They are both scheduled to graduate in spring 2005 and plan to attend medical school on the West Coast. Their long-term goals include opening a joint medical practice in neurology, strengthening their Christian faith, and serving humankind. If their past accomplishments are any indication of their future, Margaret and Timothy are destined to have a successful and happy future together.



Margaret and Timothy  
on their wedding day

# Cara & Michael Schaer

devoted to involvement



Cara and Michael Schaer

**M**ichael and Cara Schaer, MSU-Billings supporters extraordinaire, have a long history of involvement with Montana State University-Billings. They adhere to the philosophy of giving back to their community. Michael and Cara sum up their community involvement in one statement: "We don't live in a maintenance-free society." This quote by Tom Brokaw at their son's college graduation reinforced the importance of volunteerism in their lives.

Owners of Computers Unlimited, the Schaers currently employ 40 MSU-Billings graduates. They feel their relationship with MSU-Billings is a "two-way street" – they support the University, which in turn provides them with talented, educated employees.

From the time the Schaers' three children were young, Mike and Cara have been involved in community activities. Children's activities led to community projects, lifelong friends and great learning experiences. Cara has continued her involvement by serving on the Board of Directors of the Yellowstone Art Museum, Billings Depot, YWCA, and is working as a volunteer for United Way and March of Dimes. MSU-Billings Foundation has been extremely fortunate to have Cara involved in the Wine and Food Festival for 10 of its 12 years. Cara has served as chair of

several committees and is co-chair of the 2004 Wine and Food Festival. In addition to the Wine and Food Festival, Cara has worked as an Annual Drive volunteer.

Michael serves MSU-Billings in a variety of ways. He is a past chair and member of the MSU-Billings College of Business Advisory Board, serves on the MSU-Billings Foundation Board of Trustees and has been a volunteer for the Annual Drive. Mike has or is currently serving on the Board of Directors of Deaconess Billings Clinic, First Interstate Bank Advisory Board, Yellowstone Historic Preservation Board, Billings Police Foundation, Downtown Billings Partnership, Big Sky Economic Development Authority, and the Montana Avenue Development Committee.

Community action is something the Schaers' children grew up with and carry on. All are

involved in their communities, and Montana State University-Billings has been fortunate to have their daughter, Suzy, serving as the Wine Wise Seminar chair for the Wine and Food Festival for three years.

In addition to their gifts of time and talent, Michael and Cara have made significant financial contributions both personally and through their business, Computers Unlimited. Since 1987, they have given generously to the Wine and Food Festival, annual scholarships and the College of Business. Several of their gifts have added to or established endowed funds, including the Wine and Food Festival Scholarship Endowment and the Wine and Food Festival Operating Endowment.

Their tradition of commitment carries on and MSU-Billings and the community reap the benefits of Michael and Cara Schaer's philosophy of involvement.

Endowments provide a charitable giving option that combines the donor's vision with the needs of the University. An endowment gift is an investment in the future of MSU-Billings by establishing a permanent fund, which provides perpetual, annual support. Donors may establish an endowment in their names or in the name of someone they wish to honor. If you would like more information regarding endowment gifts, please contact Foundation President & CEO Marilyn Miller at (406) 657-2244 or (888) 430-MSUB.

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