

# YOUR POWERFUL IMPACT

The OSU Endowment | July 1, 2017, to June 30, 2018



**Oregon State University**  
**Foundation**

# Markets rise and fall, but an education lasts a lifetime.

And you have created something that lasts always: an endowed fund at Oregon State University.

Thank you for helping Oregon State move forward with confidence, providing life-changing experiences for students and advancing knowledge to create a better future. Your generosity is strengthening OSU now and will continue to do so for generations to come.

While this report contains a few examples, you and your fellow donors are touching the lives of countless students and professors—countless because your impact is still just beginning.

## A Broad Impact: Endowment Designation

As of June 30, 2018

*The principal of each endowment gift is invested to generate a steady, reliable flow of funds to support the university's greatest priorities and donors' greatest passions. These gifts benefit the entire OSU experience.*



RESEARCH

2%



FACILITIES

1%



PROGRAMS

36%



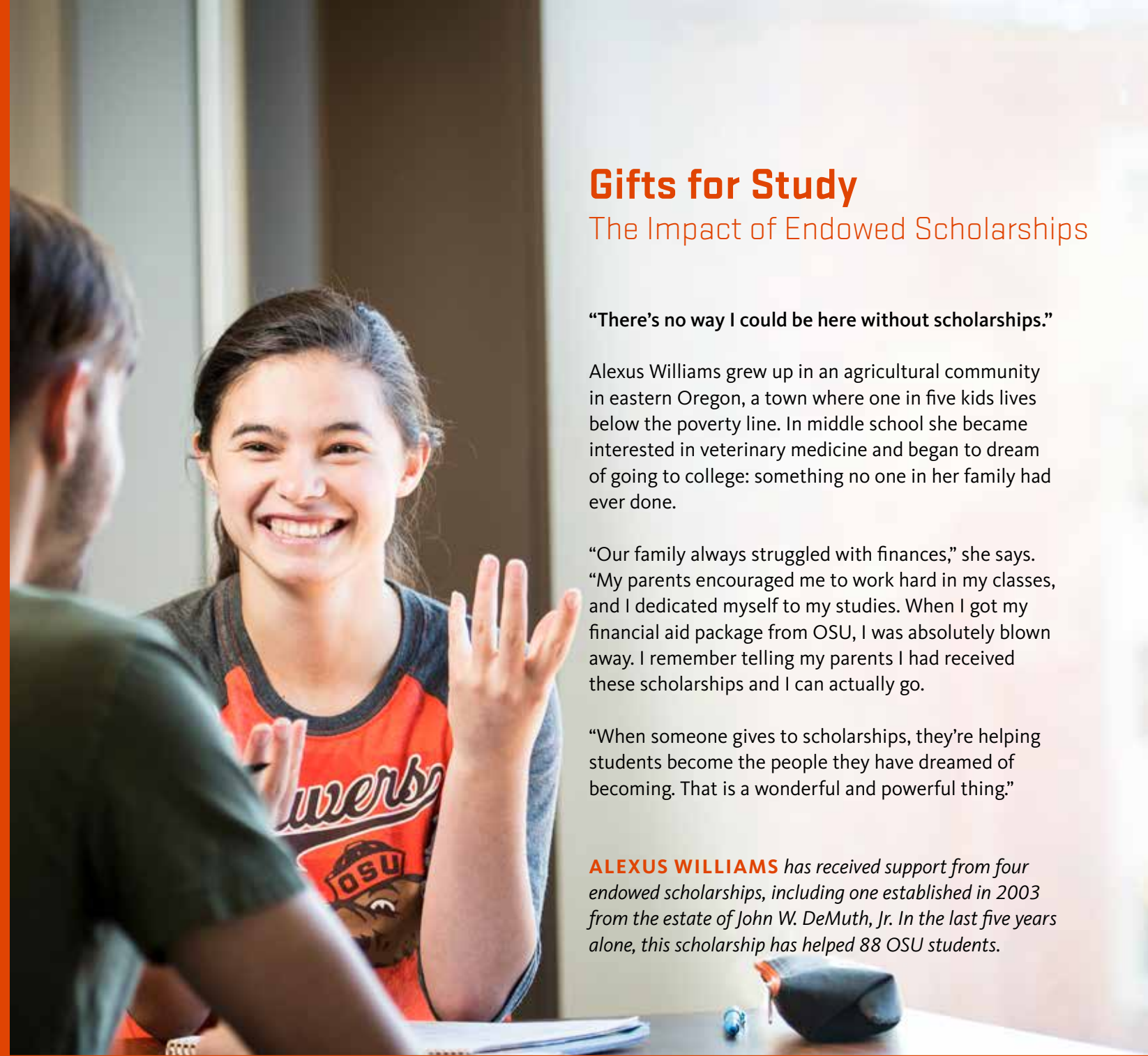
FACULTY

28%



SCHOLARSHIPS

33%



## Gifts for Study

The Impact of Endowed Scholarships

**“There’s no way I could be here without scholarships.”**

Alexis Williams grew up in an agricultural community in eastern Oregon, a town where one in five kids lives below the poverty line. In middle school she became interested in veterinary medicine and began to dream of going to college: something no one in her family had ever done.

“Our family always struggled with finances,” she says. “My parents encouraged me to work hard in my classes, and I dedicated myself to my studies. When I got my financial aid package from OSU, I was absolutely blown away. I remember telling my parents I had received these scholarships and I can actually go.”

“When someone gives to scholarships, they’re helping students become the people they have dreamed of becoming. That is a wonderful and powerful thing.”

**ALEXUS WILLIAMS** has received support from four endowed scholarships, including one established in 2003 from the estate of John W. DeMuth, Jr. In the last five years alone, this scholarship has helped 88 OSU students.

IN 2017-18, the university awarded **3,929 STUDENTS** with donor-funded scholarships/fellowships totaling:

**\$11.1 million**



# Endowment Performance

July 1, 2017, to June 30, 2018

## One-Year Total Return

As of June 30, 2018, Annualized  
Net of 1.425% advancement fee

# 9.49%

5-year: 7.30% | 10-year: 4.49%

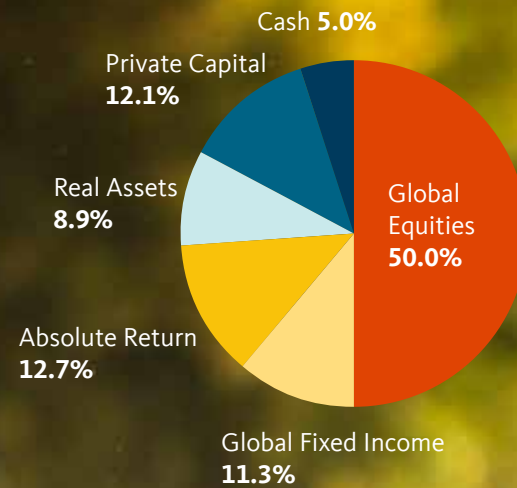
## 10-Year Performance

Over ten years, \$100 invested in the OSU  
Foundation endowment would have grown to  
\$154.45 if no disbursements were made.



## Asset Allocation

As of June 30, 2018



# Gifts for Teaching and Discovery

## The Impact of Endowed Faculty Funds

**“The endowed professorship provides great freedom for high-risk-high-reward efforts.”**

Since Jonathan Hurst joined OSU in 2008, the university’s robotics program has emerged as a front-runner, ranked among the top four robotics programs in the nation. Hurst’s lab focuses on creating robots that can go anywhere people go. His team was the first to make a machine that reproduces human-like walking dynamics.

“Grants are very constrained and specific, with careful rules about how the money is spent. But it can be difficult to cover unexpected costs or take advantage of timely opportunities—such as an outstanding new Ph.D. student applying when existing funding is already spoken for,” he says.

“With the endowment, I am more free to explore an idea that I believe is extremely promising, but which may need some work to be able to convince others.”



**JONATHAN HURST** is one of two College of Engineering Dean’s Professors at OSU. The endowed professorship was created by an anonymous donor.

**DONORS** have created **145 ENDOVED POSITIONS** at OSU.  
Each circle represents 10 faculty positions.



# Impact and Growth

The OSU Endowment

## Endowment Distributions

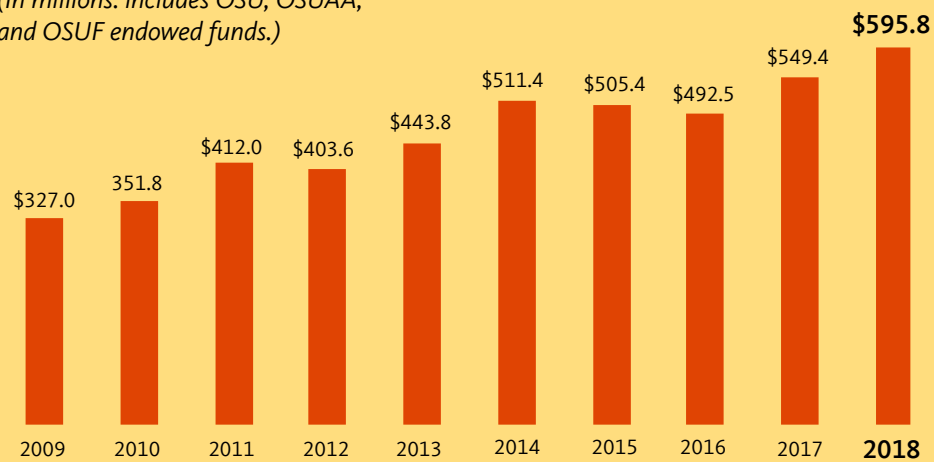
Funds disbursed to campus, 2017-18

# \$19.25 million

Represents 4.25% of the OSU Foundation endowment's 12-quarter average market value

## Endowment Growth

(In millions: includes OSU, OSUAA, and OSUF endowed funds.)



## New Contributions to Endowed Funds

(Last five fiscal years)

2013-14	\$19,435,483.62
2014-15	\$26,275,374.85
2015-16	\$24,527,713.87
2016-17	\$18,146,804.51
2017-18	\$26,487,518.89

# Gifts for Service and Innovation

The Impact of Endowed Program Funds

**“I can now go into my future with a larger perspective.”**

Last March, 31 OSU students spent their spring break in Puerto Rico, helping a school recover from Hurricane Maria. Auna Godinez, a senior in renewable materials, was particularly interested in the trees uprooted by the devastating storm. She came to understand that local residents knew this tropical wood was potentially valuable, but utilizing it wasn't easy. There was simply no way to process it.

Transformational learning happens when students apply what they've studied to complex, real-life problems. Yet many of these hands-on learning activities have additional costs. Endowed programmatic funds widen the door of opportunity.

**“I learned that it's going to take a lot more than what I can offer right now, but I would love to be one of the people to help bring light and support to this issue.”**



**AUNA GODINEZ** took part in the service learning trip to Puerto Rico with help from the Thomas I. Haley Experiential Learning Fund. Other endowed programmatic funds at Oregon State support colleges, departments, the library, the arts, athletics, 4-H, Extension, the OSU Alumni Association, and much more.

# Investment Committee

As of July 1, 2018

**LEONARD APLET '76**  
(Committee Vice-Chair)  
Portland, Oregon  
*Senior Portfolio Manager  
Columbia Management Company*

**JON BETTENDORF '88**  
Beaverton, Oregon  
*Principal  
Quest Investment Management*

**REBECCA CAMDEN '17 (HON.)**  
Corvallis, Oregon

**ERIC HOFFMAN '79**  
Portland, Oregon  
*Operations Manager  
Hoffman Construction Company*

**DOUG LAYMAN '87**  
Bend, Oregon

**DUANE MCDUGALL '74**  
Lake Oswego, Oregon

**DIANE PADDISON '81**  
Dallas, Texas  
*Founder & President  
4Word*

**BOB ROTHSCHILD '65**  
Corvallis, Oregon

**ERIC SCHOENSTEIN '88**  
(Committee Chair)  
Lake Oswego, Oregon  
*Managing Director – Portfolio Director  
Jensen Investment Management*

**DAVE THOMPSON**  
Portland, Oregon  
*President & CEO  
TEC Equipment, Inc.*

**STEVEN ZAMSKY '90**  
Darien, Connecticut  
*COO of Fixed Income Commodities  
Morgan Stanley*