



# Endowment Report

The Ohio University Foundation

January 1, 2015 - December 31, 2015

# Thank you!

As an Ohio University student, I have had the joy and privilege to learn from the best of the best. I have learned from successful professionals and professors with first-hand experience who are always ready to help with a question and request, whether it was about an assignment or a chance to connect and network with them outside of the classroom. The same can be said for our alumni that I've had the opportunity to connect with, utilizing the "Bobcat Network" to learn more about life after Athens.

It is those same alumni who have impacted my educational experience through private support from people like yourself! From helping build the state-of-the-art Schoonover Center for Communications facility to aiding in enhancing our nationally ranked and recognized programs, OHIO students like myself would not be able to have the college experience necessary to achieve success after graduation.

Knowing that I will soon be an OHIO alumna makes me so thankful for all the opportunities that have been presented to me. I look forward to beginning the next chapter of my life and to inspiring and supporting future OHIO students because I know the important role private support has played in my own experiences.

As a student that has benefited and learned from the success of your support, I thank you.

Amanda Blake  
Ohio University '16  
E. W. Scripps School of Journalism  
Scripps College of Communication  
Alpha Omicron Pi-Member

## GO AND DO



The fact that 40 percent of Athens County third graders are obese or overweight does not sit well with COMCorps program manager Lauren Borovicka. The privately funded Heritage College

AmeriCorps unit she leads spent 1,700 hours in 11 months combating this by teaching second-graders about healthy cooking and nutrition.

**"The private support gives us the resources to go and do."**

## CALLING OHIO HOME

Pre-optometry major Karen Wong not only benefits from the Barbara Strom Thompson Memorial Scholarship but shares a connection with the gift's namesake: a passion for volunteering.



**"... she also loved to give back to others."**

## SCHOLARLY RETURN



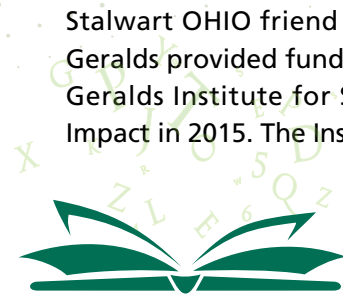
Judge and scholar in law, history, and political science R. Marc Kantrowitz (BA, '72; MA '74) returned to his alma mater in fall 2015 to teach "Famous Trials in American History" through the Robert & René Glidden Visiting Professorship Endowment, named after OHIO's 19th president and first lady.

## LITERARY LOVE

Paul Jones's love for teaching, scholarship, and for OHIO garnered him the Samuel and Susan Crawl Professorship honor in 2015, named for Professors Emeriti of English Samuel Crawl and Susan Crawl.



## TELLING STORIES



Stalwart OHIO friend and supporter Barbara Geraldts provided funds to establish the Barbara Geraldts Institute for Storytelling and Social Impact in 2015. The Institute creates and tells stories that have social relevance and and impact. It engages students in research about all aspects of storytelling, from inception to delivery and reactions to those stories. It combines the practical art of storytelling with the academic study of crafting a narrative, and uses today's digital tools to deliver those stories.

## SERVING THE WORLD

Brian Vadakin, HTC '15, traveled to Costa Rica on a Fulbright Award and to Mexico via the Honors Tutorial College Dean's Travel & Research Fund to inform his degrees in Spanish and economics.



**The "service and the research (the funding) helped me do, the experiences it helped me have—those represent knowledge and memories that will remain with me."**

## BOBCATS EVERYWHERE



Judy Dashiell, BSJ '86, will soon count her daughter and two nieces among her family's Bobcat tantrum. The non-profit senior executive hires and mentors OHIO journalism student interns and serves on the Dean's Advisory Council for the Scripps College.

**"We have a growing Bobcat family tree... it always feels like a family reunion when we meet together in Athens."**

## RISE UP

Kathy McQuarrie (AB '66) and her husband, Allen, created The Friends of Recovery Scholarship Fund to support OHIO's Recovery to Inspire, Share, and Empower (R.I.S.E.), the institution's official collegiate addiction recovery community. Kathy believes in supporting these students as they navigate college life.



**"We want students to know that they can create a life of purpose and joy..."**

## GENEROUS PIONEER



Professor Emerita of Political Science Patricia Bayer Richard holds many OHIO firsts: first female dean of University College; helped jumpstart OHIO's Women's Studies Certificate; and

many other firsts. Creating the OHIO Match™\* eligible Patricia Bayer Richard Scholarship for students with financial need let her "pay forward" scholarship support she received as an undergraduate student.

## HOME TEAM

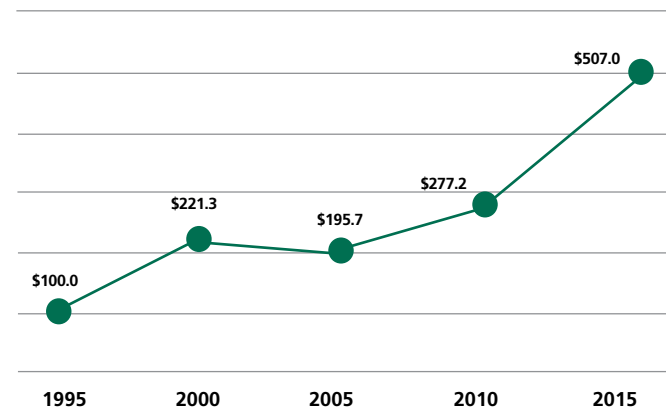
OHIO's Office for Multicultural Student Access and Retention (OMSAR) now supports emancipated foster care students through a grant from the Ohio Attorney General's office. OMSAR leads programming for these students during Parent's Weekend, holds a Thanksgiving dinner, and offers other programs of support.



## Endowment History

(in Millions)

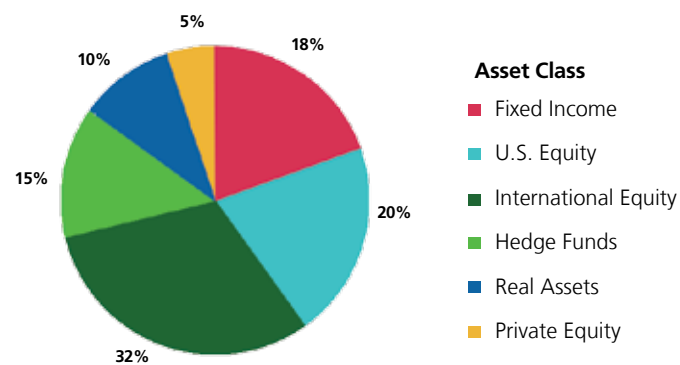
The endowments that support Ohio University have grown by over \$407 million in the past 20 years. These endowed funds provide essential support for the University's academic mission through scholarships for students, support for faculty research and creative activity, and resources for programs, partnerships, technology, and facilities.



## Endowment Asset Allocation

As of June 30, 2015

The endowment portfolio is professionally managed, with the long-term objective of producing real growth in excess of the spending policy and inflation. The endowment is broadly diversified into equities, fixed income and alternative investments, including commodities, private equity and hedge funds, with a 75% allocation to equity-oriented investments and 25% to fixed income-oriented investments. This allocation provides the opportunity for high risk-adjusted returns.



## Endowment Distributions by Purpose

Made available for the fiscal years ended June 30, 2014, 2015, 2016

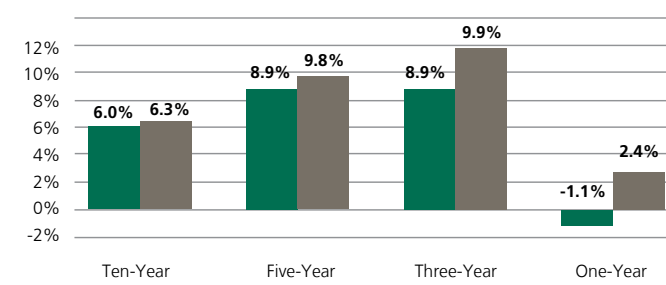
Endowment earnings are authorized for expenditure based on the endowment's average market value for the trailing 36 months. For fiscal years 2014, 2015 and 2016, the spending rate was 4% for endowed accounts whose market value exceeded the historic gift value.

	2014	2015	2016
Academic and institutional support	\$ 721,544	\$ 792,002	\$ 854,754
Instruction and research	8,788,145	9,788,377	11,189,305
Intercollegiate athletics	66,943	76,194	82,467
Student aid	4,030,411	4,500,021	5,256,208
Other purposes	151,194	161,780	172,342
<b>Total endowment distributions</b>	<b>\$13,748,237</b>	<b>\$15,308,374</b>	<b>\$17,555,076</b>

**Underwater Accounts** – Occasionally, due to a downturn in the investment market, an account's market value may temporarily fall below its historic value. When this occurs, the endowed account is "underwater." The spending rate for underwater endowments is 1%.

## OHIO Endowment Performance

For periods ended June 30, 2015



\* Represents the average nominal rate of return, as reported in the 2015 National Association of College and University Business Officers (NACUBO)–Commonfund Study of Endowments. This study was released on January 27, 2016.



# Thank You!



**For More Information**  
If you have questions or comments about this report, please contact:

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