THE OHIO UNIVERSITY FOUNDATION

ENDOWMENT REPORT

July 1, 2013-December 31, 2014
Thank you!

Ohio University students leave our greens to become leaders in the state, nation, and world. The university has provided them with the transformational education and student life experiences they need to make the world a better place.

OHIO’s 14th president John C. Baker showed tremendous foresight when he established The Ohio University Foundation in 1945. His expectation that the Foundation would grow along with and support the university has been fulfilled: As of June 30, 2014, university endowments total more than $515 million. We have donors like you to thank for this success.

The gifts you have generously given to OHIO support student scholarships, fund faculty research and creative activity, provide for unique student life programs that let students become their best selves, as well as support expansion and renovations for our eight campuses and four centers. You do what you do because you believe in Ohio University and all that it stands for. Thank you.

Enclosed is your personalized report from The Ohio University Foundation. It covers the financial status of your endowed fund from July 1, 2013 to December 31, 2014. Once again, we thank you for your extraordinary and ongoing private support of Ohio University.

Endowment History
(in Millions)

The endowments that support Ohio University have grown by over $425 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, 2014

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, 2013, 2014, 2015

Endowment earnings are authorized for expenditure based on the endowment’s average market value for the trailing 36 months. For fiscal years 2013, 2014 and 2015, the spending rate was 4% for endowed accounts whose market value exceeded the historic gift value.

OHIO Endowment Performance
For periods ended June 30, 2014

OHIO Return
Average Peer Return*

* Represents the average nominal rate of return, as reported in the 2014 National Association of College and University Business Officers (NACUBO)—Commonfund Study of Endowments. This study was released on January 29, 2015.
ACCESS AND OPPORTUNITY

Beginning fall, 2015, The OHIO Guarantee, our new level-rate tuition and fee model will offer fixed rates for housing, dining and fees, making college costs transparent and predictable for families.

OHIO’s class of 2018 is our largest, most diverse, and is among the highest academic quality classes in Ohio University’s history.

The Ebony Bobcat Network raised $30,000 for the Urban Scholars program at its 2014 annual Alumni Weekend.

The OHIO Signature Awards Program added $2.1 million over previous years for new freshmen receiving merit-based scholarships, need-based grants, and other awards.

OUTREACH AND PARTNERSHIP

Ohio University hosted the Believe in Ohio forum, a program designed to help high school students gain awareness of career opportunities in STEM entrepreneurship.

OHIO celebrated of partnership and exchange with Japan’s Chubu University in 2014.

The OHIO Innovation Fund, which has a projection of $75 million when fully subscribed, is designed to leverage the state’s established innovation ecosystems which are funded through the Ohio Third Frontier Entrepreneurial Signature Program.

By 2018, the new campuses in Dublin and Cleveland are projected to have over $2 million in tax revenue for state and local governments.

ACADEMIC AND STUDENT LIFE EXPERIENCE

Ohio University ranks 14th out of 44 that qualify as “BEST BUYS” based on the quality of their academic offerings in relation to the cost to attend by the “Fiske Guide to Colleges 2015.”

With more than 6000 students currently enrolled, the College of Health Sciences and Professions’ School of Nursing’s INNOVATIVE ONLINE RN to BSN PROGRAM enables nurses to keep working while meeting new educational standards and obtaining a bachelor’s degree.

The Disability Strategic Plan will make OHIO a leader in 10 years in inclusion and accessibility for persons with disabilities.

RESEARCH & CREATIVE ACTIVITY

2014 Presidential Teacher Awards for inspiring academic excellence.

Ohio Magazine recognized OHIO professors for excellence in education.

OHIO’s Honors Tutorial College was named one of the top public honors programs in the country by Public University Press’s “A Review of Fifty Public University Honors Programs.”

In 2014, 798 undergraduate, graduate, and postdoc students presented their work at OHIO’s annual Research and Creative Activity Expo.

Ohio University hosted the Believe in Ohio forum, a program designed to help high school students gain awareness of career opportunities in STEM entrepreneurship.

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President Barack Obama formally recognized OHIO’s LGBT Center for promoting diversity and inclusivity.

Campus Environment

Four new residence halls, a living/learning center and a residential housing central office will open on South Green in 2015.

About 80 percent of the waste generated on the construction site has been recycled.

OHIO’s Yard and Food Waste Compost Facility enables the university to compost 100 percent of its pre- and post-consumer dining waste.

OHIO extended its presence in the State of Ohio to 8 campuses and 4 centers.

Ohio Magazine recognized OHIO professors for excellence in education.
Thank You!

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

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