Your gifts to Ohio University—its students, faculty, staff, programs, and facilities—transform lives. You make a difference for students and their parents, for faculty and staff, for alumni and friends, and for the thousands of others who step onto OHIO’s campuses each year. You also inspire fellow alumni and friends to make commitments to OHIO’s future. Thank you!

The individuals whose faces you see in this report are just a few of those impacted by generous donors who have established endowments within The Ohio University Foundation.

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Your investment in OHIO has seen the endowments that support the University grow to more than $480 million. These endowments are a promise to the future of our University’s mission. Each year, they provide for student aid, academic, instructional, research, and other programmatic support. In 2016 distributions from the endowment totaled more than $17.5 million. In 2017 they will total more than $18 million.

You make this support possible. Details on the endowment(s) you have established within the Foundation—as well as overall endowment performance—are enclosed.

Thank you for embodying “Philanthropy in Support of Education” at OHIO.

With gratitude,

Jacquelin R. Weber, BSS ’96
Senior Director, Donor Relations

FOR MORE INFORMATION
If you have questions or comments about this report, please contact:
Ohio University Advancement
Donor Relations
740-593-4222
donorrelations@ohio.edu

The Ohio University Foundation
P.O. Box 860
Athens, OH 45711
www.ohio.edu/foundation
Katie Lee Franz, BA ’14, of the Ebony Bobcat Network announced the alumni society’s gift to the Urban Scholars Program during fall 2016’s Black Alumni Reunion. The Urban Scholars Program supports students from Ohio’s urban centers.

Student aid, 4,494,163  4,890,347  5,019,925
Intercollegiate athletics, 75,764  82,003  83,962
Instruction and research, 9,778,228  11,189,147  11,510,291
Other purposes, 162,210  172,806  190,151
Total endowment distributions, $1,380,374  $1,350,076  $1,665,261

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 underwater account is “underwater.” The spending rate for underwater endowments is 1%.

Sophomore Tanner Wick, BSME ’19, is a Russ Legacy Cutler Scholar. The scholarship recipient spent last summer as a powertrain product excellence intern at Tesla Motors and worked at NASA’s Johnson Space Center last fall on projects that will someday make their way to the International Space Station.

Sophomore Alison Harper, BA ’19, explored three Appalachian cemeteries to study causes of death in the region. The project was supported by the Provost’s Undergraduate Research Fund and donors who support undergraduate research and discovery.

Junior Katie McNamah, BSIE ’18, is an early childhood education major from Chillicothe, Ohio. She’s supported by The Gates Foundation–Ross County Scholar’s Fund, which paves the way to a college education for students graduating from Ross County high schools.

Senior Sara Sand, BS ’17, is an engineering physics major who’s made a difference for the environment and sustainable energy thanks to private support for the Margaret Boyd Scholars Program, the Office of Nationally Competitive Awards, and the Honors Tutorial College.

Nearly 800 children from the Alexander, Athens, and Meigs school districts enjoyed a performance by “Black Violin” in Memorial Auditorium, thanks to donors who established the Performing Arts in Education Fund.

Endowment History

The endowments that support Ohio University have grown by over $360 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 Distributions by Purpose

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 15% allocation to equity-oriented investments and 25% to fixed income-oriented investments. This allocation provides the opportunity for high risk-adjusted returns.

Endowment Asset Allocation

As of June 30, 2016

The endowment’s average market value for the trailing 36 months, for fiscal years 2015, 2016 and 2017, the spending rate was 4% for endowed accounts whose market value exceeded the historic gift value.

Endowment Performance for periods ending June 30, 2016

The nation’s leading expert on north Indian pilgrimage and folk religion, David Haberman, visited OHIO, BA ’14, of the Ebony Bobcat Network announced the alumni society’s gift to the Urban Scholars Program during fall 2016’s Black Alumni Reunion. The Urban Scholars Program supports students from Ohio’s urban centers.

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With gratitude,

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Senior Director, Donor Relations
from Ohio’s urban centers. Black Alumni Reunion. The Urban Scholars Program supports students. Kellee Perez. An alumni society’s gift to the Urban Scholars Program during fall 2016’s Black Alumni Reunion. The Urban Scholars Program supports students.支持Ohio Homecoming with their children (from left) Nina, Leah, and Caroline. The Bible study supports the College of Business annually and endowed a scholarship to support Business Bobcats, all while raising a family. 

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