YOUR POWERFUL IMPACT

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

Gifts for Study
The Impact of Endowed Scholarships

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

$100.00
June 30, 2008
$154.45
June 30, 2018

Asset Allocation
As of June 30, 2018

- Cash: 5.0%
- Global Equities: 56.0%
- Global Fixed Income: 11.3%
- Private Capital: 12.1%
- Real Assets: 8.9%
- Absolute Return: 12.7%

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 ENDOWED 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)

<table>
<thead>
<tr>
<th>Year</th>
<th>Endowment Growth</th>
</tr>
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<tbody>
<tr>
<td>2009</td>
<td>$327.0</td>
</tr>
<tr>
<td>2010</td>
<td>$351.8</td>
</tr>
<tr>
<td>2011</td>
<td>$412.0</td>
</tr>
<tr>
<td>2012</td>
<td>$403.6</td>
</tr>
<tr>
<td>2013</td>
<td>$443.8</td>
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<tr>
<td>2014</td>
<td>$511.4</td>
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<tr>
<td>2015</td>
<td>$595.8</td>
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<tr>
<td>2016</td>
<td>$505.4</td>
</tr>
<tr>
<td>2017</td>
<td>$492.5</td>
</tr>
<tr>
<td>2018</td>
<td>$549.4</td>
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</tbody>
</table>

New Contributions to Endowed Funds
(Last five fiscal years)

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Contributions</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013-14</td>
<td>$19,435,483.62</td>
</tr>
<tr>
<td>2014-15</td>
<td>$26,275,374.85</td>
</tr>
<tr>
<td>2015-16</td>
<td>$24,527,713.87</td>
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<tr>
<td>2016-17</td>
<td>$18,146,804.51</td>
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<tr>
<td>2017-18</td>
<td>$26,487,518.89</td>
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</tbody>
</table>

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.
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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

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