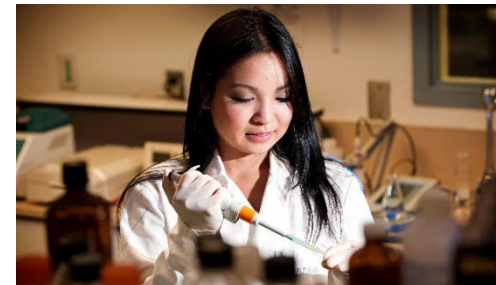


# OSU Board of Trustees

October 21, 2016

**Jon DeVaan**, chair, OSU Foundation Board

**Shawn Scoville**, executive vice president, OSU Foundation



# The OSU Foundation

## Vision

To create a better world by inspiring support of—and for—Oregon State University.

## Mission

We partner with Oregon State University to engage our community, inspire investment and steward resources to enhance the University's excellence and impact.

## Core values

Collaborative, Responsible, Respectful, Inclusive, Innovative

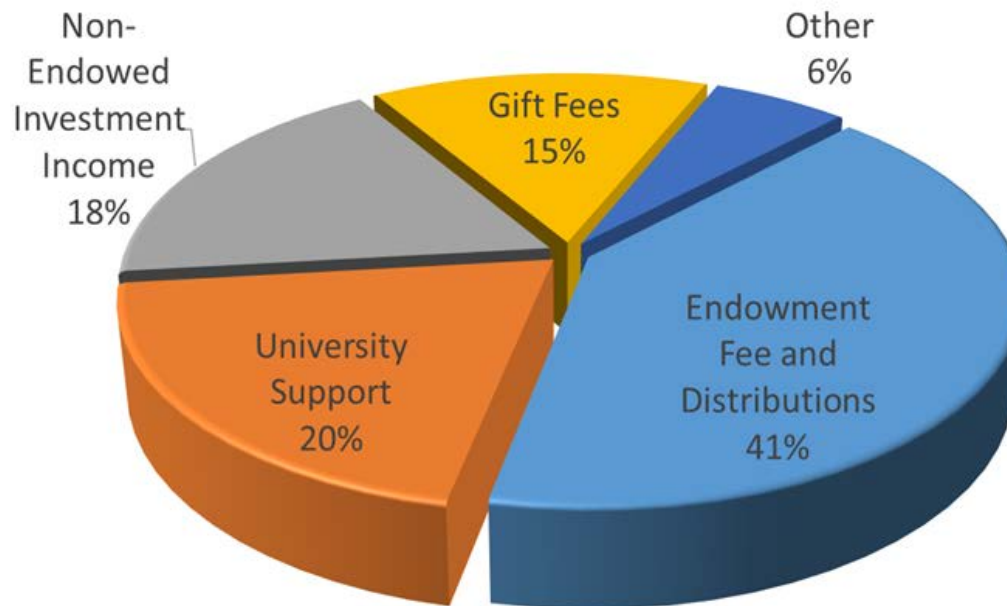
# Key Principles of Institution-Foundation Relationships

- Mutual respect
- Culture of engagement and collaboration
- Transparency and accountability
- Effective alignment of agendas
- Fundraising as a shared responsibility

*Source: Association of Governing Boards (AGB)*



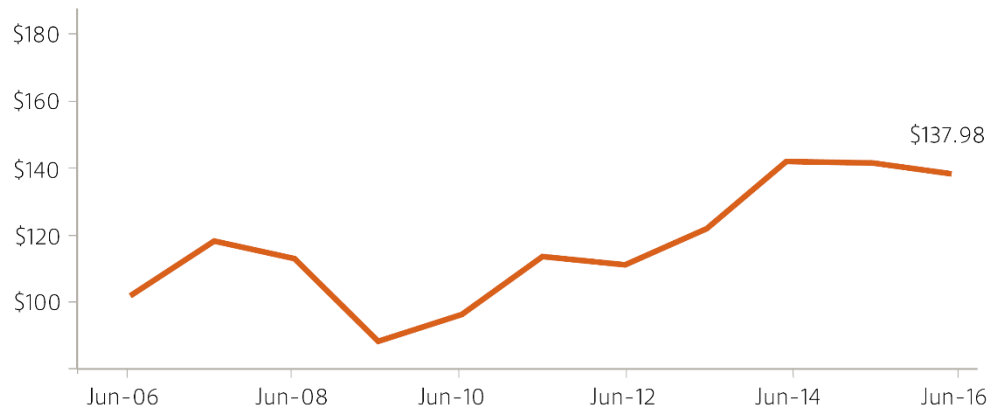
# How the Foundation is Funded



# The Endowment

## 10-Year Performance

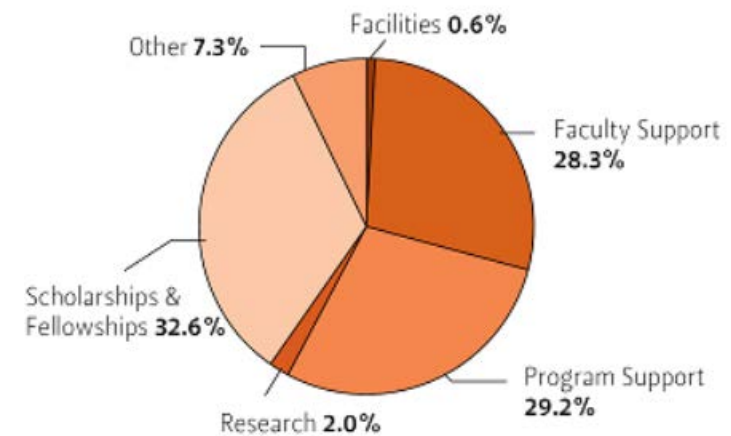
Over ten years, \$100 invested in the OSU Foundation endowment would have grown to \$137.98 if no disbursements were made.



## TOTAL RETURN (annualized)

1 Year	-1.5%
5 Year	4.2%
10 Year	3.4%

## Endowment Designation





# The Campaign for OSU 2004 – 2014

**THE CAMPAIGN FOR OSU** began July 1, 2004 and officially ended December 31, 2014.  
\$1.14 billion raised | 106,000 donors | 1,000 donors of \$100k+



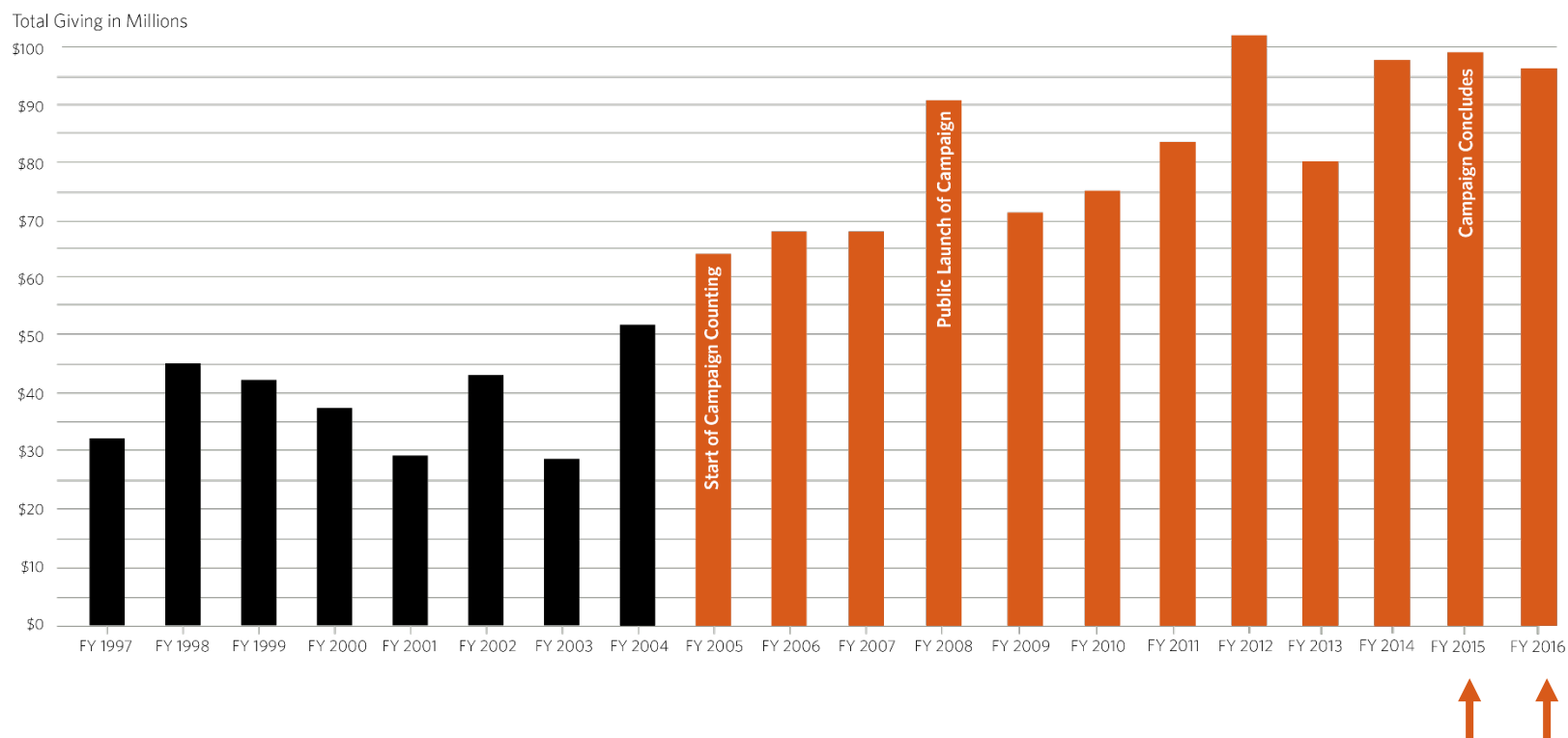
More than 600 new **scholarship and fellowship** funds

28 newly constructed, renovated, or acquired **facilities**



79 new **endowed faculty** positions

# Fundraising Growth 1997 – 2016



*As reported to the Council for Aid to Education (CAE)*

# Progress Since Campaign

- \$253M in two years
- **Strategic Fundraising Initiatives**
  - Marine Studies
  - Oregon Forest Science Complex
  - Valley Football Center
  - Student Success
- **Strategic Plan 2017-2021**
  - Campaign 2.0





# “To Create a Better World”

## OSU Foundation Strategic Plan, 2017 – 2021

### Goals

1. **Optimize philanthropic support.**
2. Increase the quantity and quality of **engagement** among our core audiences.
3. Enhance the **University’s brand** among our core audiences to increase engagement and philanthropic support.
4. Build a “**Best Place to Work**” environment by developing aspirational recruitment, hiring and retention strategies in a highly competitive market.
5. Transform our organizational culture to one that embraces **new technologies** and uses analytics to drive organizational performance.
6. Strengthen existing and pursue **new ventures** to generate resources in support of the University’s mission.

# Integration with the OSU Alumni Association

- The OSU Alumni Association and the OSU Foundation have separate, but complementary missions. Integration allows us to capitalize on shared services and greater collaboration.
- Together we can do more to advance the university's strategic priorities, support student success, engage supporters, and provide services to alumni.
- Philanthropy at all levels thrives in high engagement organizations.

# Major Themes for the OSU Foundation Board in FY '17

- Strategic Plan Implementation
- OSU Foundation Funding Plan
- Integration with OSU Alumni Association
- Endowment Transition





# Continuing Our Momentum

An aerial photograph of a university campus, likely the University of Oregon, showing various academic buildings, green spaces, and a large stadium. The campus is surrounded by lush greenery and trees with autumn foliage. In the background, a range of mountains is visible under a blue sky with scattered clouds.

Close partnership with university is key

We have institutionalized our partnership

Preparations for next campaign are underway



# Thank you!

## Questions?

