Oregon TECH
Board of Trustees
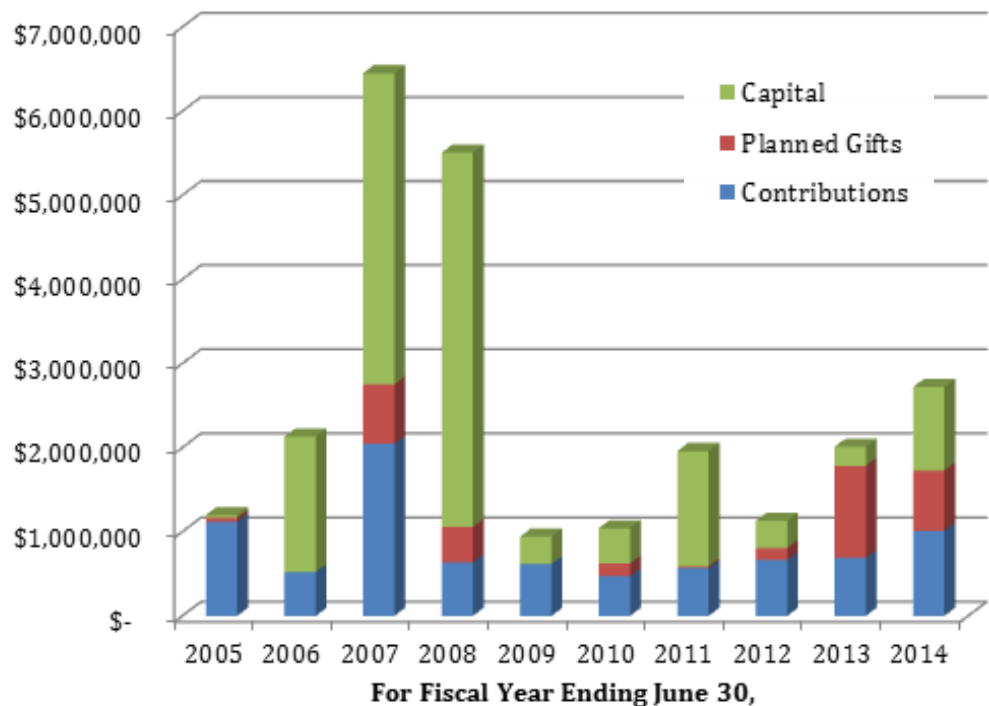
CHAPTER

V

University Advancement

A University Development

The University Development Department is charged with providing financial support of Oregon Tech's mission by connecting donors, alumni, and friends with philanthropic opportunities at the university in partnership with the Oregon Tech Foundation. University Development works to build and enhance positive relationships and create opportunities to connect potential supporters and the University. Through initiatives and activities that embody institutional values, University Development aims to advance Oregon Institute of Technology's role as one of the nation's leading technological and health professions universities.

Engagement with donors and alumni is a large part of the responsibilities of University Development. Inspiring philanthropy of the University's strongest advocates allows the University a great deal of financial flexibility and has assisted in the construction and renovation of several buildings on campus. These capital endeavors tend to skew the data and therefore are separated out in the following charts. Additionally, planned and deferred gifts are reported in their own category.
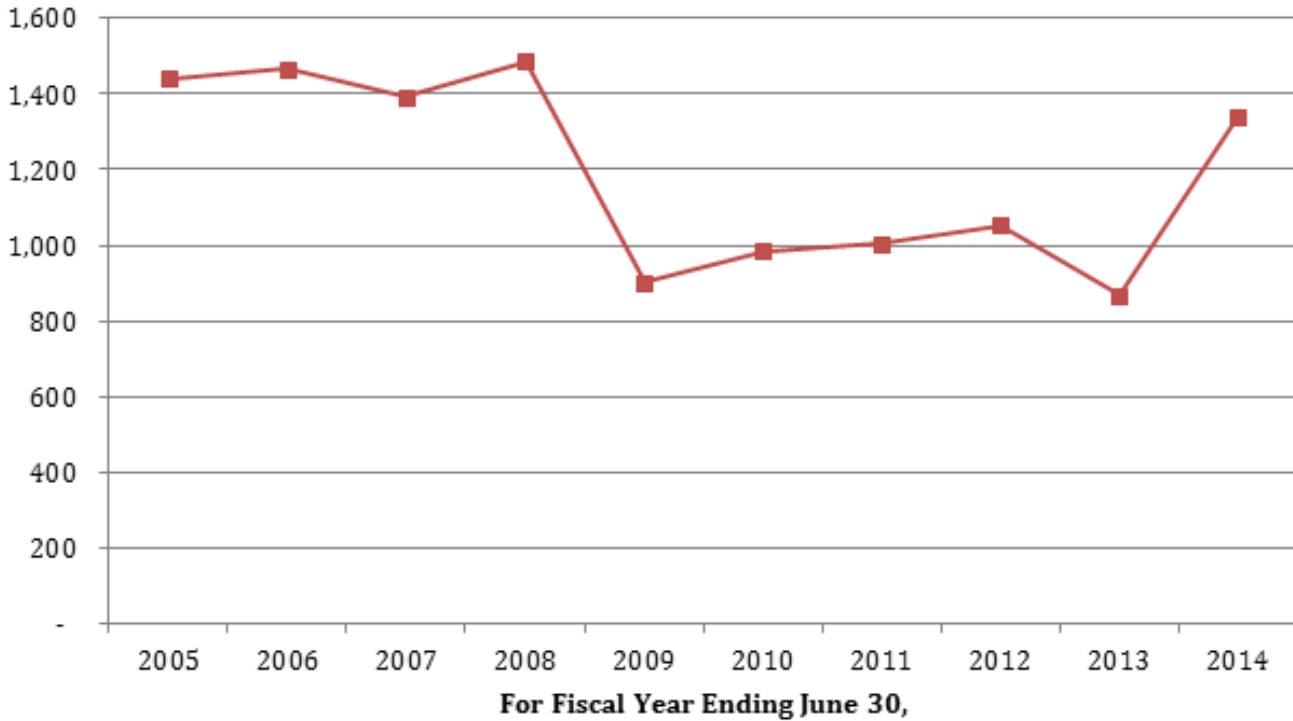
Contributions

For Fiscal Year Ending June 30,

Just as important as dollars raised is the need to build and grow a donor base. In the following chart you'll see the donor base and how it's fluctuated over time. After years of a declining donor base, it's recovering nicely and is on track for returning to levels prior to the Great Recession.
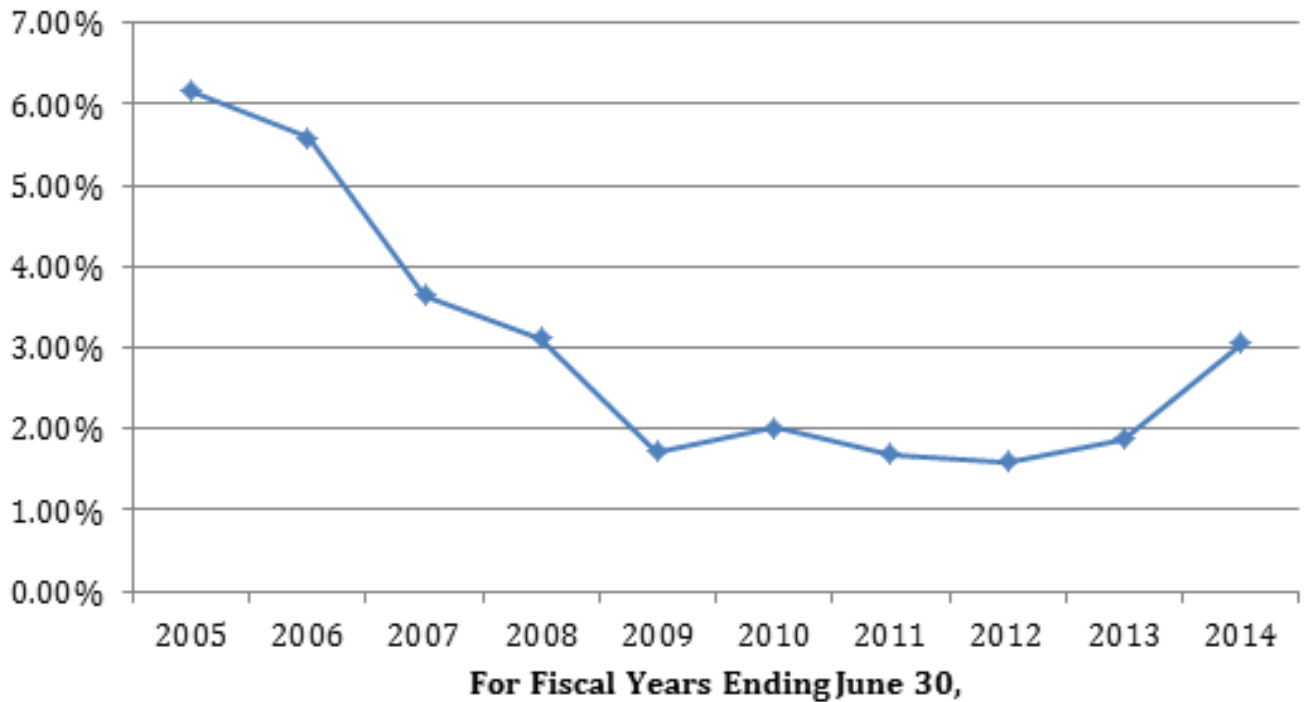
Number of Donors

For Fiscal Year Ending June 30,

Within the donor base we like to review the support from our alumni. The denominator for the alumni participation rate is contactable alumni in our database. This number roughly represents 17,000 in any one given year. The alumni office has been working hard on successfully rebuilding the participation rate of our alumni.

Alumni Participation Rate

For Fiscal Years Ending June 30,

B Oregon Tech Foundation

Background

In 1969, the Oregon Tech Foundation was established to support the educational, cultural, charitable, and service activities of Oregon Institute of Technology through philanthropic support. Established as a 501(c)(3) tax-exempt organization, the Foundation is a separate legal entity from the University and is the designated charitable arm of the University.

The Foundation has enriched the University and student life by combining their efforts with the Oregon Tech administration and community leaders to accomplish some of the most notable projects on campus:

- Martha Anne Dow Center for Health Professions
- Jesse A. Crabtree Civil Engineering Learning Plaza
- Danny Miles Court floor and scoreboard replacement
- Shaw Historical Library
- John F. Moehl football stadium

Mission

The mission of the Oregon Tech Foundation is to further the educational, cultural, charitable, and service functions of Oregon Institute of Technology, or any successor or affiliated institution; to acquire financial support for these activities through gifts, grants, bequests, development campaigns or other types of transactions designed to create funds for the benefit of the university; to promote the public relations aspect of the university in order to improve the understanding of its programs among students, alumni, potential employers of graduates, friends of Oregon Institute of Technology and other individuals, groups, organizations or publics.

Vision

The Oregon Tech Foundation will ensure Oregon Institute of Technology's ability to sustain and grow as a nationally recognized university through ever increasing board, alumni, community, industry, global, and key stakeholder support. Each board member will advance the mission of Oregon Institute of Technology and the Oregon Tech Foundation and serve as ambassadors in the community, state and country.

Doing Business

The Foundation Board is composed of alumni, community members, business leaders, and friends of Oregon Tech from a variety of geographical locations and skill sets. The Foundation board of directors is tasked with management and growth of the assets of the Foundation. There are three regularly scheduled meetings throughout the year.

The board is led by an executive team composed of a President, Vice President, Secretary, Treasurer, and committee chairs. Most of the work of the Foundation board is done in committees. Committees typically meet more often than the board of directors. There are five committees of the board:

Executive Committee carries out the functions of the Board between meetings.

Committee on Directors recruits directors and monitors board composition and bylaw structure.

Development Committee plans activities to encourage and recognize continuous and lifetime giving.

Finance Committee invests and provides oversight of net assets and recommends the annual budget.

Scholarship Committee participates and provides oversight in scholarship administration and donor stewardship.

The day-to-day operations of the Foundation are managed by the Executive Director. The offices of the Foundation are located in Snell Hall on the Oregon Tech campus.

Director Expectations

Each director is expected to lead by example. As part of a philanthropic organization, it is expected that all of our directors give of time, service, and monetary means. They are also expected to attend meetings of the board and committees, actively participate in meetings and committees, and to be an ambassador for Oregon Tech.
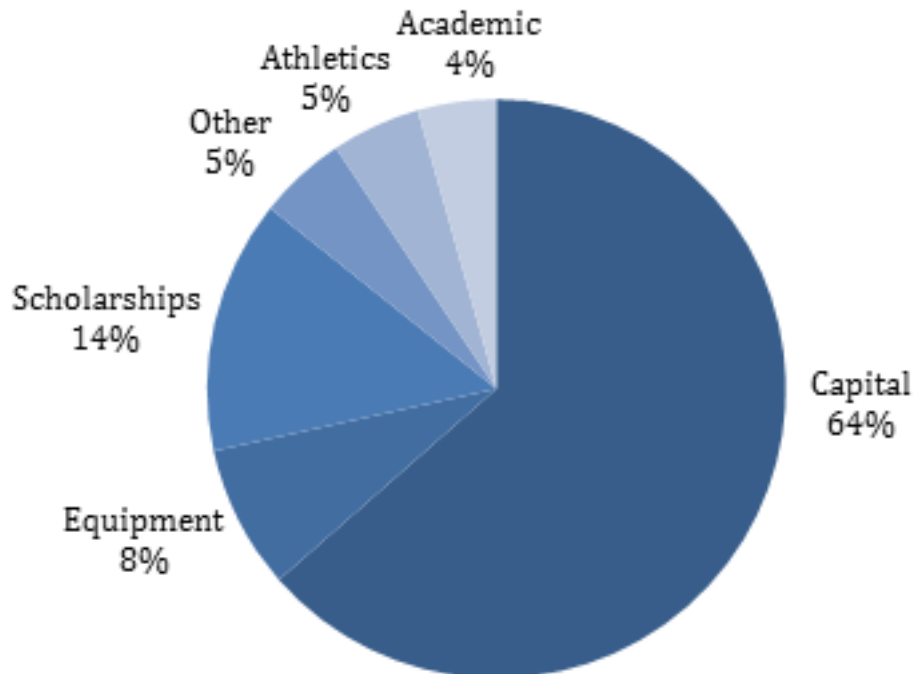
Supporting Oregon Tech

On an annual basis, the Foundation provides approximately $1 million to Oregon Tech. The most popular, and largest, program of the Foundation is the scholarship program. Other areas of support include capital, academic programs, athletics, equipment, and the Shaw Library.

As mentioned before, the mission of the Oregon Tech Foundation is to support the mission of Oregon Institute of Technology. One way to measure the support provided to Oregon Tech is by the amount of annual support. On average, the Foundation provides annual support to Oregon Tech of approximately $1M. In years of capital campaigns, the amount can vary significantly. Over the past ten years the Foundation has provided support in excess of $23M to Oregon Tech in multiple categories.
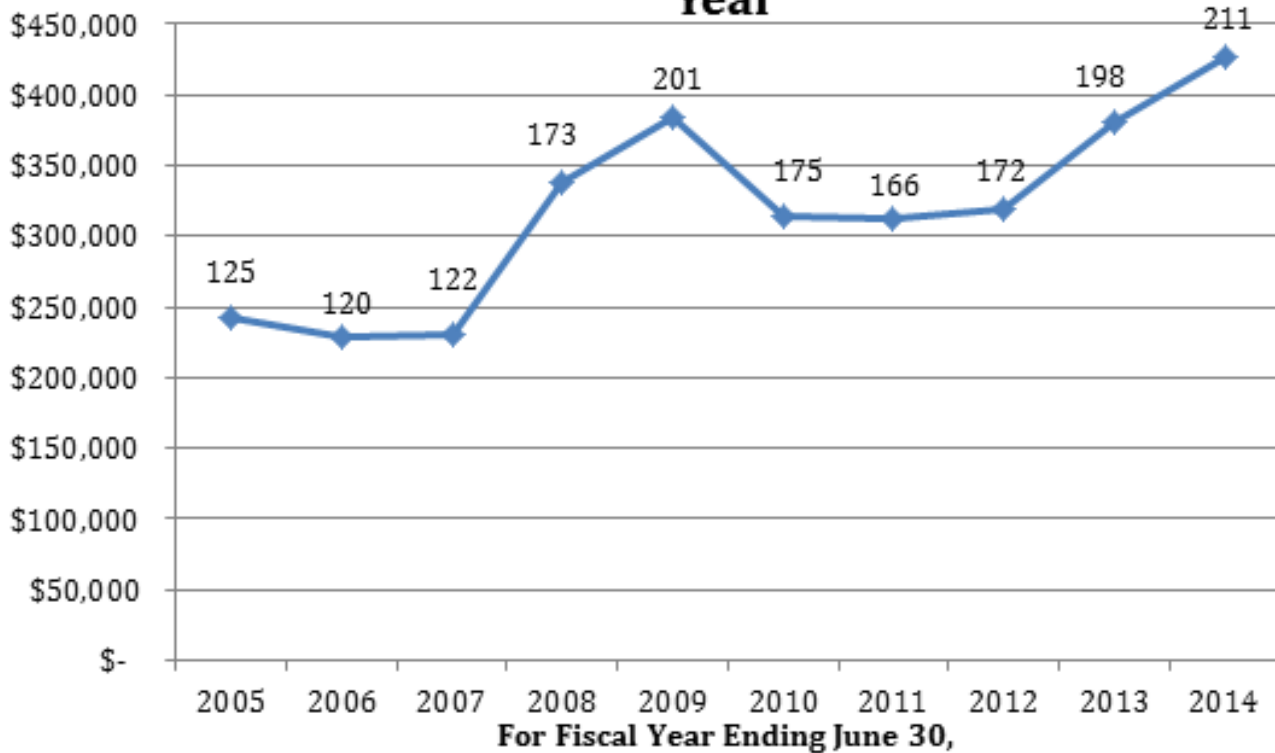
10-Year Average Distribution by Program

Outside of capital, our biggest program is scholarships. The number of awards and total dollars awarded are on a trajectory to have doubled over a ten year period of time. However, there's still not enough to award in scholarships. Each year over 600 applications are received with only a fraction of them receiving scholarship support.

Amount and Number of Scholarships per Year

Long-Term Goals

In October 2012, the Foundation developed six long-term priorities. These priorities are regularly measured and reported to the board of directors at their meetings.

1. Grow net assets to $25 million by 2017

2. Eliminate debt in two years*

3. Recruit a full board of directors of 28-30 directors

4. Enhance and build meaningful relations

5. Develop a comprehensive campaign to raise net assets to $100M by 2030

6. Develop a PR and marketing plan

* To finish the construction of Wing II of the Dow Center, the Foundation took out a loan on future fundraising and outstanding pledges. Some pledges remain uncollected as of today, hence the loan.

Endowment

Continued growth of the assets of the Oregon Tech Foundation is fundamental to changing the funding formula of Oregon Tech. The endowment balance is critical for long-term sustainable revenue for the University. Here you can see the growth of the corpus of the endowment as well as the portion that represents net growth. The net growth is comprised of investment earnings less program expenses and administrative fees. The Foundation aims for a 3% annual net growth.

Endowment Growth

Fiscal Year Ending June 30,

■ Endowment Corpus   ■ Net Growth