



**FOUNDATION**

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# SOUTHERN OREGON UNIVERSITY FOUNDATION

**ANNUAL REPORT**

**2019**



# REACHING NEW HEIGHTS

Dear Raider Family,

On behalf of the students, faculty, and staff of Southern Oregon University, the SOU Foundation and its Board of Trustees wish to thank all of the generous donors and volunteers who stepped forward in fiscal year 2018-19 for their investment and philanthropic leadership. Your generosity inspires us.

During the year, more than 2,700 alumni, parents, friends, foundations, and corporations contributed \$3.3 million in private funding to support the university's academic programs, campus infrastructure, service initiatives, and intercollegiate athletics. From providing scholarship support for first-generation college students to supporting faculty members across the academic disciplines, our donors' investments will have an impact on Oregon and on the lives of our students, their families, and our communities for years to come.

This report recognizes the role that our philanthropic partners play in assuring that Southern Oregon University remains a vital and robust organization in our region, state, and nation. All of us associated with SOU are proud of what we accomplished last year, and we are eager to continue building the future together.

To each of our loyal donors, thank you. We appreciate your commitment to the mission and vision of Southern Oregon University.



Marc Bayliss  
President  
Southern Oregon University Foundation

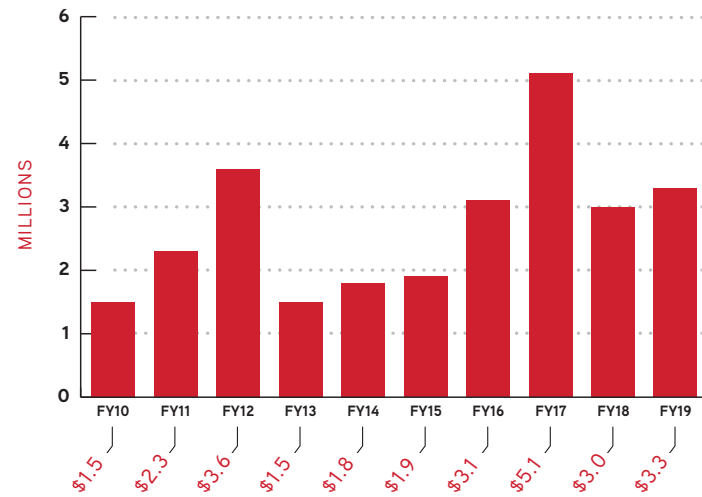


Janet Fratella  
Vice President of Development, Southern Oregon University  
Executive Director, Southern Oregon University Foundation

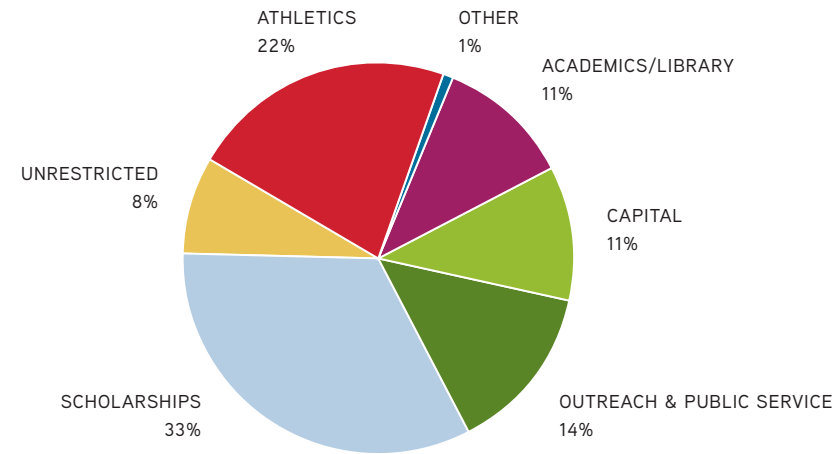
# FISCAL YEAR 2019 OVERVIEW

The Southern Oregon University Foundation received \$3.3 million in private gifts, grants, and pledges to support Southern Oregon University during FY 2018-19. More than 2,700 donors contributed toward a range of scholarship funds, academic and athletic programs, and public outreach initiatives.

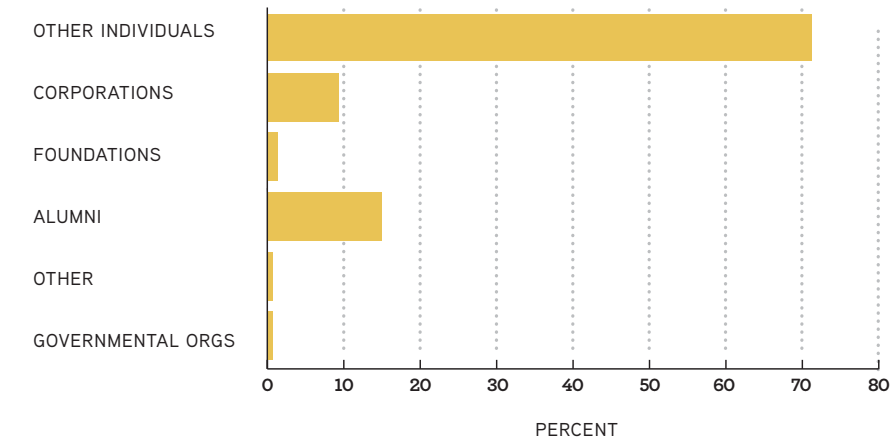
**TOTAL PRIVATE SUPPORT FY 2010-2019**  
(FOR FISCAL YEARS ENDED JUNE 30)



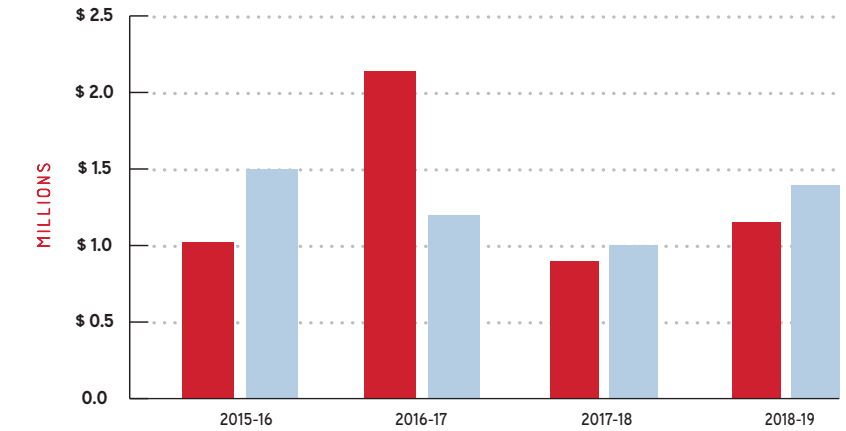
**TOTAL PRIVATE SUPPORT BY DESIGNATION**  
(FY 2019)



**TOTAL PRIVATE SUPPORT BY SOURCE**  
(FY 2019)



**STUDENT SCHOLARSHIPS**



AMOUNT RAISED  
AMOUNT DISTRIBUTED\*

\*includes annual distribution from endowment funds



## PAYING IT FORWARD

### TO CREATE HEALTHY COMMUNITIES

**S**heila Clough and her husband Chris are the first donors to create a scholarship for students in SOU's new Healthcare Administration Program, which is designed to prepare students for occupations in healthcare administrative and ancillary services. Sheila is chief executive officer of Asante Ashland Community Hospital and a member of the university's Governing Board of Trustees. She knows firsthand the transformative power of scholarships and is now paying it forward.

Sheila earned a bachelor's degree in medical technology from the University of Minnesota Medical School and an MBA for healthcare executives from Cardinal Stritch University in Wisconsin. She said that if it weren't for the scholarships she received she would not have been able to attend college. "My parents didn't have a lot of money, but when I was in high school, I got a full-ride scholarship," said Sheila. "Even with the scholarship, I was working nearly full-time while in school in order to make ends meet," she said.

This experience left a lasting impression. "I recognize the gift that I got was incredible. I know that I wouldn't have achieved what I have without scholarships," she said.

Understanding the struggles of parents and students, the Cloughs decided to step up and help. "We are so happy that our family is able to help," said Chris. "I feel like we have a responsibility to one another. If we can help someone, then we should."

The Cloughs also recognize that SOU's Healthcare Administration Program has the potential to impact the health of communities throughout Oregon. "It is a national crisis in terms of having enough qualified individuals in healthcare.

Having a program here will definitely help our region, as we will be able to draw from the talent coming out of the university," Sheila said.

The university approved the Healthcare Administration degree program in 2017 after consulting with regional healthcare providers to understand their employment needs. The degree offers a pathway for current healthcare workers from entry-level employment into management.

According to John King, Ph.D., Director of the Division of Health, Education and Leadership, the program was designed to prepare students for careers managing the daily operations of healthcare organizations, such as hospitals and clinics, community health centers, nursing homes, and hospices. The degree is interdisciplinary and structured so all graduates possess a solid foundation in healthcare systems, terminology, data management, ethics and safety, as well as communication and cultural competency. Students choose a concentration area depending upon their interest area and career path. These include personnel management, community health, and data analytics.

Enrollment in this degree program is expected to grow in the ensuing years. Now in its second year, the program has 46 students, an increase of 20 percent since the degree was first announced.

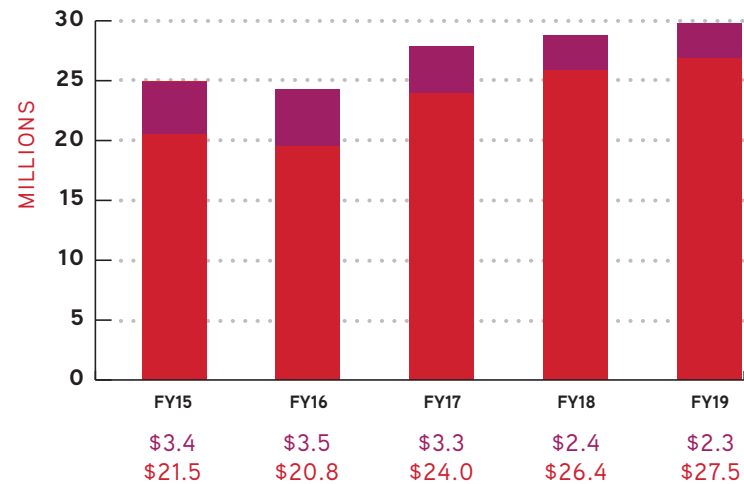
**"Healthcare has been a passion throughout my career. We hope others who share that passion will be inspired to give," added Sheila.**

For the Cloughs, the scholarship also offers them a deeper connection with SOU. "We are personally looking forward to being connected to the program and seeing how our gift can impact the students firsthand," said Chris. "I feel like we are getting more out of this than we are giving."

# ENDOWMENT PERFORMANCE

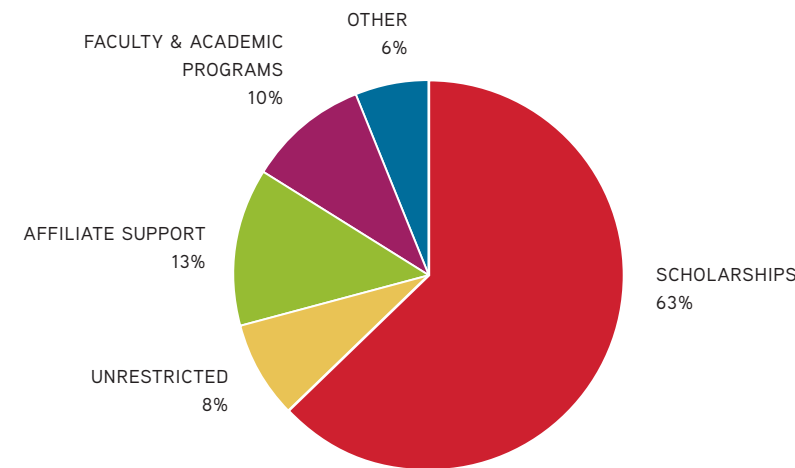
The SOU Foundation holds and manages 221 individual endowment funds with the intent to provide financial support in perpetuity to Southern Oregon University. Endowment funds are created when donors make charitable gifts to support the university's mission. The SOU Foundation has endowment and short-term invested funds totaling nearly \$30 million—\$27.5 million of which are permanently restricted.

**ENDOWMENT GROWTH FY 2015-2019**  
(FOR FISCAL YEARS ENDED JUNE 30)



SHORT-TERM FUNDS  
ENDOWMENTS

**ENDOWMENT FUND BY DESIGNATION**  
(AS OF JUNE 30, 2019)



# ENDOWMENT INVESTMENT STRATEGY

The investment objectives of the SOU Foundation reflect the long-term nature of the endowment fund. A desire to grow endowment gifts and to produce a stable and predictable payout stream is balanced with the foundation's commitment to donors to ensure the longevity of the funds in its care.

Considerations that shape the SOU Foundation's investment strategy are:

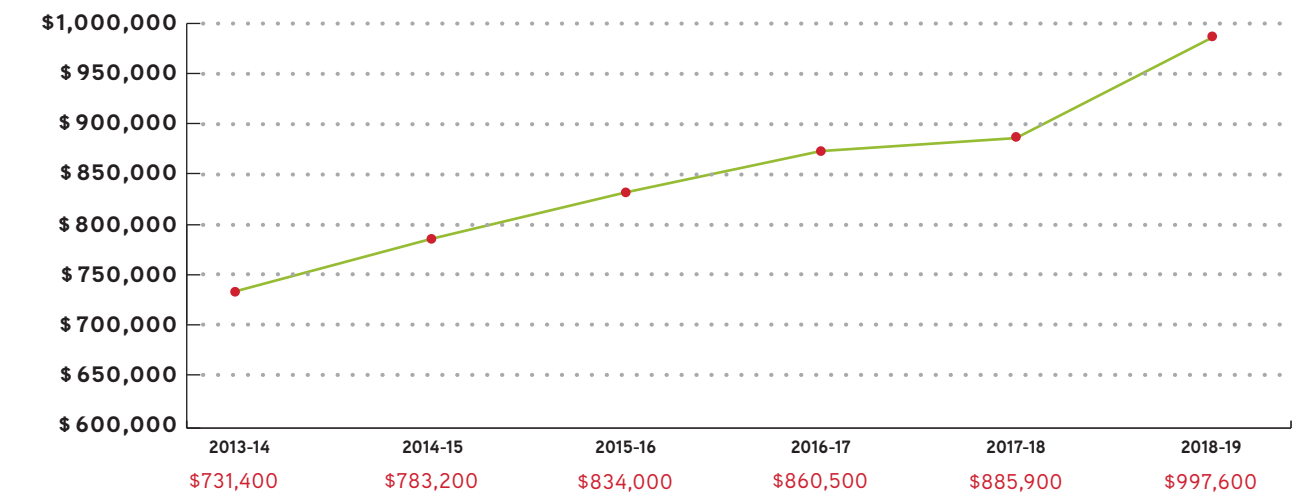
- Produce a relatively predictable and stable payout stream each year.
- Maintain the purchasing power of the assets over the investment horizon.
- Balance the support of present and future generations of students and faculty.

Accordingly, the SOU Foundation's primary investment objective is to produce a total return net of fees that equals or exceeds the foundation's spending rate and annual administrative fee.

## ENDOWMENT IMPACT

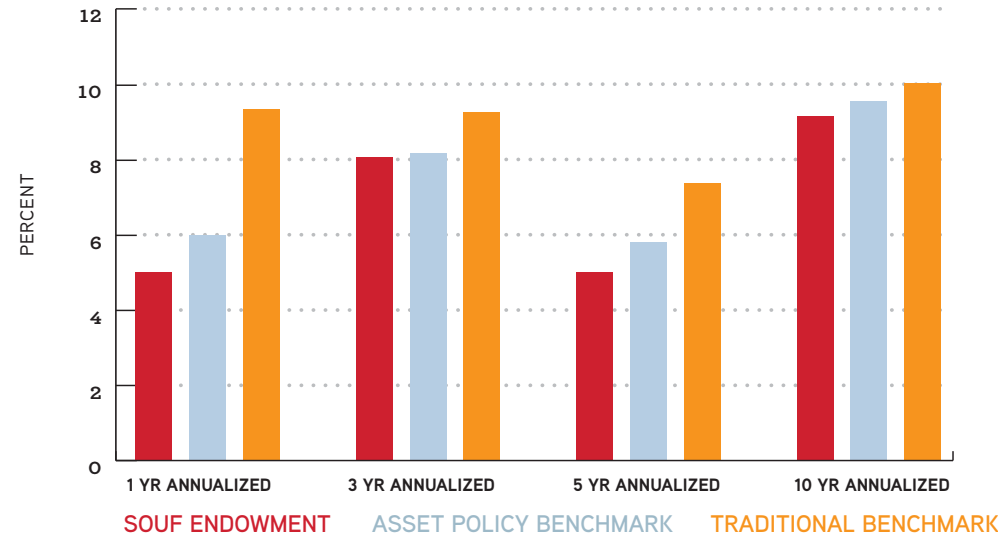
The foundation distributes 4% of each fund's market value to the university annually.

**AMOUNT TRANSFERRED TO SOU**  
(FOR FISCAL YEARS ENDED JUNE 30)



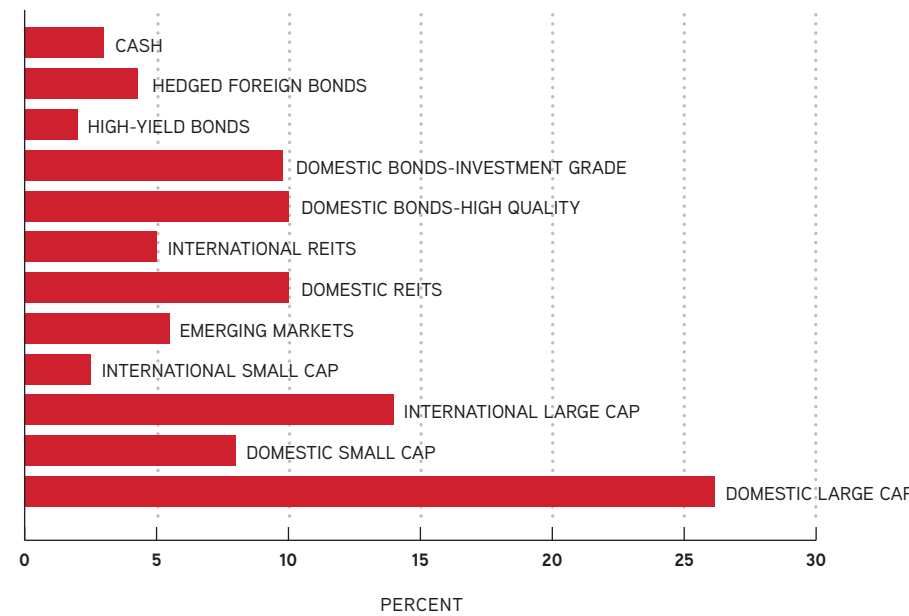
**BENCHMARK RETURN COMPARISONS**  
(FOR FISCAL YEARS ENDED JUNE 30)

The SOU Foundation endowment produced a total return of 5.1% for the period of July 1, 2018 to June 30, 2019. Additions to the endowment for this fiscal year totaled \$650,000.



**TARGET ASSET ALLOCATION**

The SOU Foundation endowment is managed by TIAA Kaspick and invested in approximately 71% stocks and 29% bonds and cash. Both the stock and bond allocations are broadly diversified across different asset classes and managers. This diversification is designed to lower the expected volatility of the portfolio's returns and help protect against negative market environments.



# GOOD CHEMISTRY SPRINGS FROM LOVING RELATIONSHIP

Faculty and staff in SOU's Chemistry Program are still happily stunned at the gift they received from the estate of Aneta '63 and James McIntyre. It bestows approximately \$150,000 to fund student scholarships. "We were thrilled," said Chemistry Professor and Chair Hala Schepmann, Ph.D. "This gift came out of nowhere, and it is going to have a significant impact on our student research program," said Schepmann.

The McIntyre's estate was distributed in two phases. Anticipating just one gift, the chemistry faculty combined it with other scholarship funds to create a scholarship in the McIntyre's name. "That scholarship is a life-changer for students. We weren't expecting anything more," said Schepmann. But a significant second estate distribution arrived earlier this year.

While the gift was a surprise to the university, the donors and their motivations were no mystery. The McIntyres had a long relationship with the university. James was a geology consultant who taught at what was then Southern Oregon College. Aneta, an early chemistry graduate, was the program's first storekeeper. Her job was to outfit the lab, order chemicals and supplies, prepare solutions, and keep the lab materials organized and updated. Even today, her store-keeping skills are legendary. "She was so good at her job and so organized, that even after the chemistry storeroom was remodeled we maintained her layout and still have many of her handwritten cards," said Schepmann.

"Many alumni and emeritus faculty members remember Aneta. As storekeeper she was beloved by both the students and faculty," said Schepmann.

Schepmann said she wishes she could personally thank the McIntyres. "I would say, 'Come and see how your generosity has impacted our students and the opportunities you have helped to create for them,'" she said.

SOU's Chemistry Program is very competitive and has a reputation for producing graduates prepared to step into graduate schools and find success. Since 2000, graduates have been accepted at notably higher rates than the national average to medical, dental, pharmacy, optometry, physician assistant, and law schools. While there are several reasons why students are successful, chief among them is the program's accreditation by the American Chemical Society. This accreditation means that the program meets very strict standards and that students who graduate have successfully completed a rigorous curriculum that emphasizes laboratory experience and research.

**Students who use the chemistry labs today and in the future will be impacted by the generosity of the McIntyres.**



# FULL POTENTIAL

DONOR INSPIRED BY NATIVE AMERICAN STUDENTS

**G**rant Williams has made a point of saying ‘yes’ to what life offers, traveling the world and offering to be of service when needed. He has worked with children in Haiti, mothers in South Africa, and prisoners in California. This former professional dancer and choreographer is also an avid supporter of the arts who generously gives to causes that provide support and inspiration for those marginalized by society.

A strong ally of Native American communities, Williams made a significant gift to fund three programs that directly impact Native Americans associated with the university. One portion of his gift was used for scholarships to recruit Native students to SOU. Another portion supported Konaway Nika Tillicum, the university’s summer pre-college youth program, and the final portion funded broader programming in support of the Native American Studies Program and Native initiatives.

Because of the Native Connections Scholarship, SOU recruited six Native students from the western U.S. Paige Sullivan, a member of the Passamaquoddy Tribe, is from California. “This scholarship is very important for me because I am the oldest of three kids with a single mother. This will help out with some of the costs of moving away from home in California and starting my future,” said Paige.

Another student, Celeste Keplin, is a member of the Turtle Mountain Band of Chippewa Indian in North Dakota. A major in creative writing, Keplin plans to share the stories of her people as they overcome obstacles to become leaders.

According to the U.S. Census Bureau, Native Americans continue to face an overall poverty rate higher than average for the rest of the U.S. population. In addition, Native Americans are one of the most underrepresented groups in colleges nationwide, and many Native students are daunted by the cost of a college education. “It is important to me, and it should be important to everyone in this country, that Native students have an opportunity to realize their potential,” said Williams.

The Konaway program emphasizes community. “Students and families are immersed in a supportive environment where student success and academic competence is encouraged and expected, while students also have the opportunity to explore their identities and build self-confidence,” said Rachel Jones, Director of Outreach and Engagement.

A study last year co-initiated by the American Indian College Fund found that in spite of more than 1,000 tribes with five million members, Native Americans are often misrepresented or ignored. A lack of representation on college campuses means that younger Native students do not see people like themselves in college and may be less inclined to consider college in their future. “Scholarships and programs such as Konaway help promote college access,” Williams said. “Education has the power to transform the lives and legacies of people, their families, their tribes, and their communities.”

**“I am a strong believer that you can improve the well-being of a community by focusing on students and young people,” Williams said.**

Because of funding provided by Williams, there were an additional 28 students who attended the Konaway program in 2019. “This was our largest group of students in program history with 54 attending,” said Jones. “We were able to accept more students into the program and facilitate participation from a wider geographic area,” she said.

Williams’ generosity of spirit and his philanthropy are necessary, even in our increasingly progressive and culturally adaptive world. As he spreads the word about how a scholarship or a program that supports Native Americans can be life-changing for students, he knows first-hand that it also can be transformative for those who give. “There is no greater joy than the joy of giving,” he said. “I have more than I need in life. How can I reconcile not sharing it, how can I not help?”



# GIVING

## NEW LIFE TO LIFELONG LEARNING

The Osher Lifelong Learning Institute (OLLI) at SOU is a place where the maturing adult can learn new things and pursue a variety of interests. Above all, though, it is a place for social connection.

OLLI volunteer Lorraine Vail said that these community connections are a primary reason why the group began a fundraising campaign to renovate the former World War II barracks that have housed most of OLLI's classes for 25 years. "The buildings were definitely outdated, but they also needed to be more comfortable for our members to have the right-size classrooms for discussions," said Vail. "OLLI classes are not just about sitting in a lecture, they are about sharing thoughts and ideas with one another."



The buildings were originally part of Camp White, an Army training base and POW camp near Medford. After the war, many Camp White facilities were relocated throughout southern Oregon. After being moved to the SOU campus, the buildings were later named for Phil Campbell, the university's former housing director.

The total cost to renovate the Campbell Center was set at \$665,000, an amount that would update HVAC and electrical systems as well as outfit the center with new technology and furnishings. "We had a goal of raising \$500,000 from donors for the project, and we achieved it," said Vail, who co-chaired the ReNEWall campaign. According to Vail, 40 percent of OLLI's members contributed, but its biggest boost came from the William G. and Ruth T. Evans Fund of The Oregon Community Foundation, a donor-advised fund established by the parents of OLLI supporters, Peg and Barb Evans.

The sisters were raised with a strong sense of community and giving. Long after their parents' deaths, the Evans sisters have continued the family's tradition of giving. Philanthropy to organizations and institutions they care about is something the Evans sisters learned from their parents, said Barb. "They taught us that you can make a difference. You can change a person's life," she said.

"My parents, my sister, and I, all have the same goal: to make the area and its institutions better," said Peg. "You never know what a gift of financial support can do for people's lives."

It is that spirit of generosity that inspired the Evans sisters to contribute to the Campbell Center renovation project, according to Peg. "Through the foundation, we had the means, and we knew we could contribute to making OLLI a better place for everyone," she said.

William Evans was a family physician who deeply cared about his patients. He set up several funds in western Pennsylvania, where they

lived at the time, to fund healthcare in the low-income school districts where his practice was located. "He made his living in that area, and he wanted to give back to the community," according to Peg.

When the family moved to Oregon, Ruth Evans, a former WWII nurse, endowed a scholarship fund for nursing students planning to work in the Rogue Valley, a legacy that continues to serve nursing students at OHSU in Ashland and at RCC.

**"My parents always encouraged philanthropy to whatever extent people can do it, to pass it forward," said Peg.**

Both Peg and Barb are musicians, and Peg's connection to SOU and OLLI runs particularly deep. She's an SOU professor emerita of music and a renowned organist. She is also an OLLI member who teaches music courses, music history, and a course on philanthropic giving called "How to Be a [Better] Philanthropist," in which she encourages others to give financial support to organizations they are passionate about. "Why not give if you can?" she said. "There are many, many needs, and you don't have to have a great deal of money to make a difference."

Making a difference in a person's life is a core component of the OLLI mission. Vail said that a lot of OLLI members are seniors who live alone, and OLLI is their key connection to other people. "We were very conscious of designing a space that would help build community, a space that would be comfortable," she said.

Vail added that the fundraising campaign itself, with OLLI members, teachers and volunteers joining forces, illustrated the strength of the OLLI community and the deep connections of its members. "This is all possible because of a dedicated group of volunteers. There was a real team spirit about it."





## GRAND GIFT HONORS DEVOTED EDUCATOR

**W**hen WilmaRia Kim Boyd passed away in 2016, her husband Dan, a retired Colonel in the U.S. Marine Corps, honored her memory with a gift to SOU that embodied both her lifelong focus on learning and her love of music. He donated her Steinway piano to the university's Music Program. "It seemed the appropriate thing to do," said Dan. "She devoted her life to education, and she loved music."

Indeed, Kim had a deep passion for learning, boundless energy, as well as the determination to accomplish things others wouldn't dare. Born in 1930, in Berlin, Germany, she came to the U.S. as a young bride. While working and raising a family, she earned a scholarship to Eastern Washington University and graduated with distinction in just three years.

The young mother became a middle school German teacher, and was selected as the television teacher for the German-language program that served viewers in Eastern Washington, Idaho, and Montana. During this time, the unstoppable Kim also earned a master's degree in education, taught evening classes, and (by herself) built a three-bedroom house for the family. "She could do just about anything she set her mind to," said Dan.

Later, Kim earned her doctorate and took a leadership position with Oregon's higher education system office in Eugene. The position required long-distance travel throughout Oregon, so she earned a private pilot's license and used her own airplane to commute. "She was a very accomplished woman in many fields," said Dan. "But education was her passion. She was pushy about it."

Kim shared that passion with countless students throughout the country and in Europe. After retirement, she and Dan settled in Ashland, where she enjoyed the beauty of southern Oregon, gardening, and, of course, her piano. "Music was always a part of her life," noted Dan. And donating Kim's beloved Steinway to SOU seemed the perfect gift to help future generations of students.

"Fostering education is something that will pay off many times over in the future," shared Dan.

**"You can help one individual and that individual will probably help another in the coming years, so supporting a university in any way you can is the right thing to do," said Dan.**

# GOVERNANCE

## BOARD OF TRUSTEES

The SOU Foundation is governed by a volunteer Board of Trustees. By volunteering their time to serve on foundation committees and to build relationships with university donors, trustees play a critical role in securing the long-term financial health of Southern Oregon University. The Board of Trustees serves as the governing board for the SOU Foundation and has fiduciary responsibility for the general business functions of the foundation, including the oversight of the SOU Foundation's property, assets, and policies.

### 2018-19 SOU FOUNDATION OFFICERS

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Nonprofit Executive (retired)  
Ashland, OR

**Sue Kupillas**  
Vice President, SOU Foundation  
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Medford, OR

**Gregory Koenig**  
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Ashland, OR

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Ashland, OR

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Southern Oregon University  
Ashland, OR

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**David Wright**  
Principal  
CPM Real Estate Services, Inc. and RE/MAX PLATINUM  
Medford, OR

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Southern Oregon University  
Ashland, OR

**Janet Fratella**  
Vice President of Development  
Southern Oregon University  
Executive Director  
SOU Foundation  
Ashland, OR

## ABOUT THE SOU FOUNDATION

The mission of the Southern Oregon University Foundation is to secure private philanthropic support to advance SOU and to invest and manage gifts responsibly to honor donors' wishes.

Established in 1959, the SOU Foundation is the primary organization through which private support is managed for the benefit of Southern Oregon University. Private gifts and grants to the SOU Foundation are designated to the SOU program or fund of the donor's choosing. Contributions can be made by contacting the SOU Foundation office at (541) 552-6127 or by making a gift online at [giving.sou.edu](http://giving.sou.edu).

### SOU Foundation

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