

Ohio Wesleyan University  
*2008-09 ANNUAL REPORT*

BE BOLD

To Ohio Wesleyan's many friends, alumni, and partners,

On behalf of the Ohio Wesleyan University Board of Trustees, it is my pleasure to share this report on the University's progress. It has been a great year for OWU, highlighted by the development of a bold new strategic plan that will chart the University's course over the next decade. This plan, including a new curricular plan, will ensure that we continue to deliver a world-class academic experience to every student who attends Ohio Wesleyan. Upon graduation, these future alumni will be intellectually accomplished and well trained in their chosen fields, and grounded in an outstanding liberal arts tradition that challenges them to become engaged, service-minded leaders in the global community.



During his first year as president, Rock Jones traveled to 34 cities for the “In Concert with Rock” tour, which engaged and excited alumni and friends across the country. We hope to build on that excitement over the course of Rock's second year, as we sharpen our focus on a new strategic direction. Rest assured this new direction will preserve OWU's most distinctive qualities. Our students will continue to make us proud through their accomplishments and service to others. Our faculty will provide our students with a truly transformative education. Our leadership team will articulate a clear vision for the future success and stability of the University; and our alumni, as always, will serve as OWU's enthusiastic ambassadors and advocates to the world beyond our campus borders.

The stories in this issue of the Ohio Wesleyan Magazine and the intentions of the hundreds of supporters recognized in these pages reflect the value of the OWU experience. We are extremely fortunate to have so many committed and generous donors, and we are proud to celebrate their spirit of giving to ensure that future generations may share in Ohio Wesleyan's tradition of excellence.

Thank you for your ongoing support of Ohio Wesleyan.

A handwritten signature in cursive script that reads "Kathleen".

**Kathleen Law Rhinesmith '64**  
Chair  
OWU Board of Trustees

## FUNDRAISING PROGRESS (2008-09)

The Ohio Wesleyan Annual Fund is the University's primary unrestricted annual giving program. Since 1926, the Ohio Wesleyan Annual Fund has contributed to the University's growth in stature among the premier liberal arts institutions in the nation. The Annual Fund seeks to maximize each student's "OWU Experience" by directing resources to priority areas – those that most affect the quality of the curricular and co-curricular experience of all students. Gifts to the Annual Fund support financial aid, academic programs, classroom and residential enhancements, and student involvement activities.

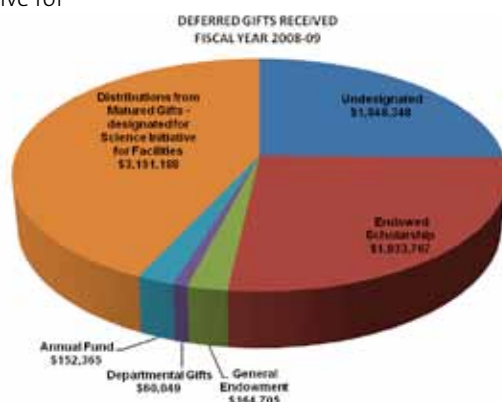
In 1926, the Annual Fund started with 863 alumni participants who contributed \$5,289. During the Fiscal Year 2008-2009 the level of commitment and dedication to their Alma Mater grew to 7,323 alumni, parent, friends and organizations who contributed \$3,730,230.

Total Annual Giving to the University reached \$4,355,202 during the fiscal year through additional gifts to Team OWU (\$177,893), the President's Circle (\$387,079), and the Woltemade Center (\$60,000). Alumni continue to make significant donations to the University during their reunion years with the Class of '59 breaking the 50th reunion class record by raising \$611,076. In addition, the graduating class of 2009 gift of \$10,234 to the Annual Fund broke a record both in the percentage of participation and dollars raised by a graduating class.

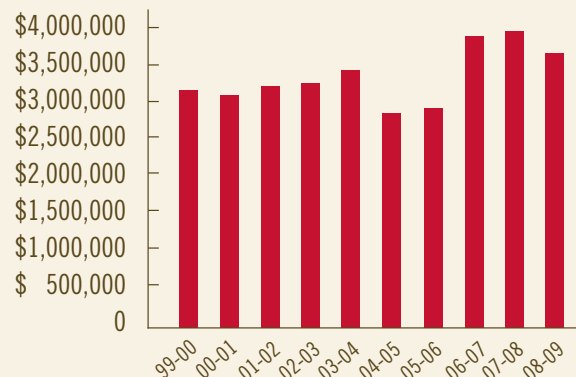
**Exceptional performance...** here's some very positive news about how we use the money you entrust to us. Ohio Wesleyan has received a 4-Star rating from Charity Navigator ([www.charitynavigator.org](http://www.charitynavigator.org)), the nation's largest independent charity evaluator. This rating, which Charity Navigator terms "exceptional," means that Ohio Wesleyan "exceeds industry standards and outperforms most charities in its cause." With this ranking, Ohio Wesleyan joins other elite institutions, such as Amherst College, Bowdoin College, Williams College, Carlton College, Haverford College, and Kenyon College. In short, Ohio Wesleyan is worthy of your trust and commitment—and the need to assist our students is great.

**Estate giving...** The University was the beneficiary of numerous estate gifts throughout the fiscal year by alumni and friends totaling more than \$4,159,233. OWU received over \$3 million from the termination of an earlier gift of annuities, designated for the Science Initiative for

Facilities. The Tower Society welcomed 42 new members as well as 7 recommitments during the year, with deferred commitments totaling over \$11.5 million. The chart below documents the purposes designated for these gifts by the donors.



## Ohio Wesleyan Annual Fund: success over the last decade



## OWU Annual Fund Participation by Years Post Graduation

Years Out	% Giving	Avg. Gift
1 - 4	6.0%	\$94.59
5 - 9	8.4%	\$123.36
10 - 14	9.2%	\$222.41
15 - 19	9.3%	\$307.66
20 - 24	13.9%	\$401.43
25 - 29	16.8%	\$347.51
30 - 34	21.6%	\$380.27
35 - 39	26.7%	\$408.04
40 - 44	30.7%	\$850.36
45 - 49	36.3%	\$1,063.19
50+	43.0%	\$856.08

## Giving Societies: 2008-2009

Giving Club Description	Donor Number	Gift Amount
Gray Chapel Guild \$50,000 +	13	\$803,999
The Herman Shipp's Circle \$25,000 - \$49,999	10	\$198,636
The Mary Monnett Society \$10,000 - \$24,999	62	\$478,393
The Founders Society \$5,000 - \$9,999	111	\$412,079
The Trustees' Society \$2,500 - \$4,999	121	\$221,925
The President's Club \$1,000 - \$2,499	480	\$442,301
The Adam Poe Club \$500 - \$999	638	\$268,718
The University Club \$250 - \$499	936	\$204,197
The Century Club \$100 - \$249	2,683	\$266,132

## Financial Summary/Stability (2008-09)

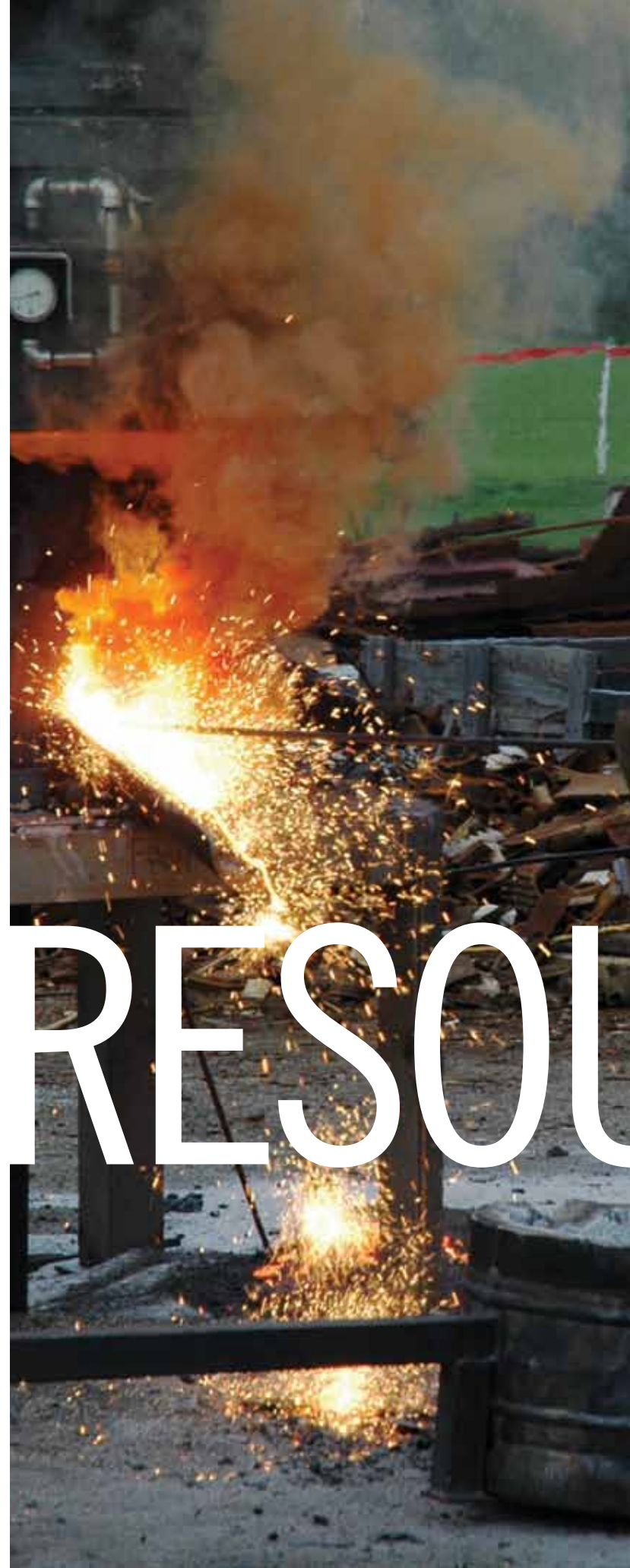
Like every institution, business, and family in America, Ohio Wesleyan University has been impacted by unprecedented challenges in the global economy. Unlike many, we entered the tumultuous times in a position of relative strength. The University is weathering the storm and has operated with a balanced budget, including budget surpluses in two of the past three years.

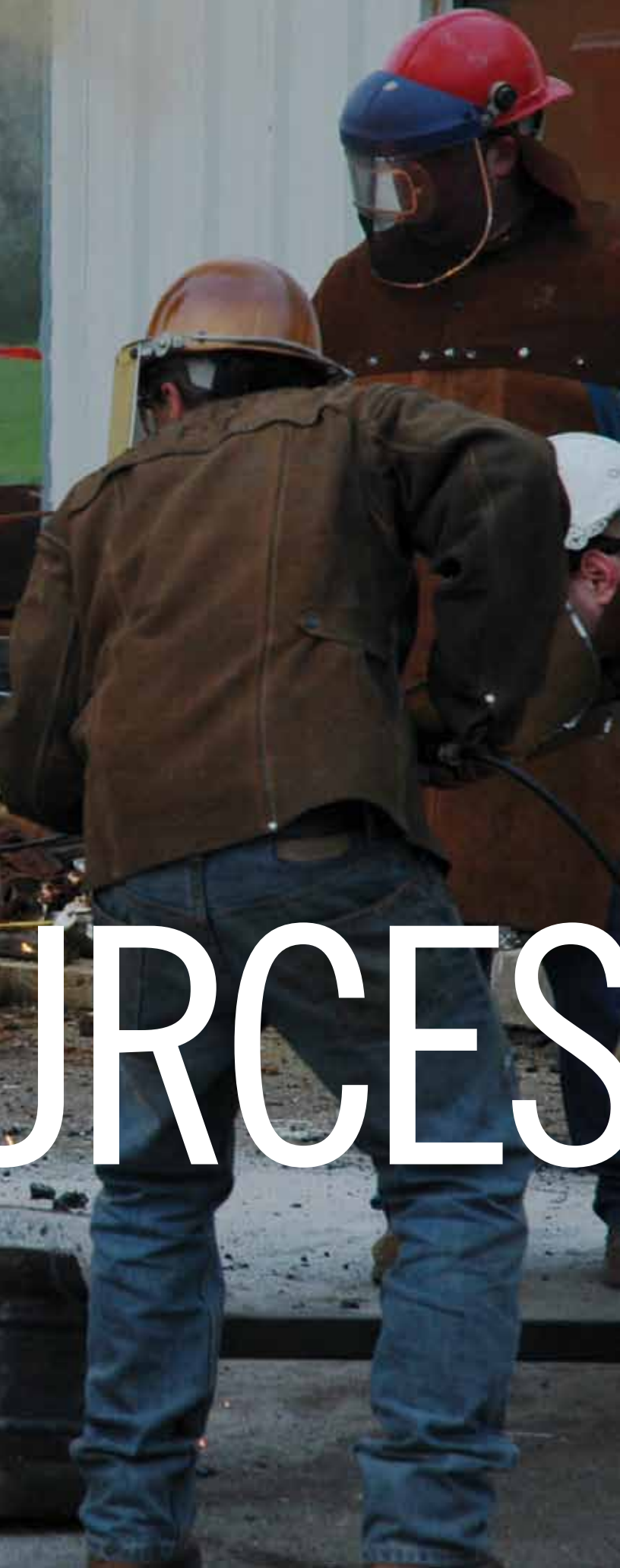
### *Ohio Wesleyan's sources of income (revenue) for FY2008-09 - budgeted*

1. Student Fees (includes Tuition, Fees, Room & Board)	\$75,663,210	(81%)
2. Gifts & Bequests	\$4,331,463	(5%)
3. Endowment Income	\$6,862,928	(7%)
4. Scholarship aid (includes Outside Aid, Government or otherwise)	\$2,400,000	(3%)
5. Government Grants	\$280,600	(.3%)
6. Bookstore & Other Revenue	\$2,184,660	(2%)
7. Trustees' support - University Relations/Marketing Initiatives	\$1,908,071	(2%)
Total:	\$93,630,932	

### *Ohio Wesleyan's expenses 2008-2009 for FY2008-09 - budgeted*

1. Instructional & Academic Support (includes Faculty Salaries)	\$22,813,225	(24%)
2. Institutional Support (development, admissions, communications and admin.)	\$12,509,360	(13%)
3. Student Services	\$8,226,504	(9%)
4. Public Service (mission trips, community learning and engagement)	\$162,943	(.2%)
5. Operation and Maintenance of Plant/Facilities	\$6,544,974	(7%)
6. Auxiliary Enterprises (includes recurring operations, bookstore/ auxiliary services, and other)	\$10,657,043	(11%)
7. Net Grant Aid to Students	\$32,716,883	(35%)
Total:	\$93,630,932	

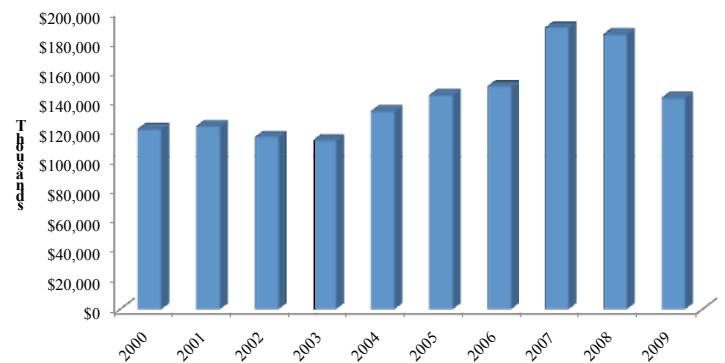




The University's endowment provides critical income to support the University's mission in every aspect of the University operations. The Ohio Wesleyan endowment enjoyed tremendous growth from 2003 through 2007 thanks to a combination of the generous support of our friends and alumni, careful stewardship by our Board of Trustees, and favorable market conditions. From its peak of over \$190 million in December of 2007, however, the endowment dropped to a low of nearly \$120 million in March of 2009. This rapid fall actually outperformed almost every major index over the same period as well as many of our peer institutions, which underscores the value of a well diversified and positioned portfolio, but does little to erase the absolute severity of the losses. Thanks to our previous investment placements and some key tactical investment decisions undertaken this spring, the endowment has seen very positive growth and returns since its March low, rebounding to more than \$145 million by June 30, and to more than \$160 million as of October 1, 2009.

Even with the success of our on-going fundraising efforts and dedicated work of the investment committee, the value of the Ohio Wesleyan University endowment remains at the lower end of our peers in the Great Lakes College Association (GLCA). In order for OWU to maintain its competitive edge as an institution of choice for the best students and faculty, it is imperative that we significantly grow the endowment through all gifts, including estate commitments.

**OWU 10 Year Endowment Values**  
as of June 30, 2009



Sparks fly as OWU students and Professor of Fine Arts Jon Quick create art from iron.

**2009 University  
Enrollment Snapshot:**

1,850 total enrollment  
54% female, 46% male  
Representing 45 state, 57 countries  
49% Ohio Residents  
20% International students  
and U.S. multicultural students

**Class of 2013:**

515 new students (note that this  
includes transfers)  
14 % U.S. Multicultural  
9% International  
14% Legacy

**Academic Profile:**

Average GPA = 3.46  
38% were in the top 10% of their high school class  
62% were in the top 25% of their high school class  
Ave. ACT score = 26 mid-50% = 23 - 29  
Ave. SAT = 1188 (CR and Math) mid-50% = 1070-1310



# COMMUNITY

## LOOKING AHEAD

After a year of careful planning and collaborative conversation about the future of the University, Ohio Wesleyan is poised for an exciting and eventful 2010. OWU's course over the decade to come will be set by its new Strategic Plan, and a rigorous new curricular plan that is under development will shape the educational experience for our students based on three strategic pillars:

- **Theory to Practice**
- **International Exposure**
- **Tightly-knit Community**

### THEORY TO PRACTICE

In the months ahead, OWU will develop a curricular approach that will touch every student, increasing opportunities to blend classroom theory with practical experiences on and off campus through internships, apprenticeships, volunteer service, undergraduate research, leadership development, study travel, study abroad and artistic endeavors. The completion of the curricular plan will require substantial investment to add more faculty positions and make resources available for faculty development, student and faculty grants and new programming. The OWU approach of combining rigorous classroom study with real-world experience equips students with the tools and habits they will need to be successful and fulfilled in their chosen fields of endeavor beyond OWU. To support this initiative, we will, competitively award \$250,000 in grants to students and faculty for theory-to-practice and international opportunities in the coming year.

The success of such a distinctive curricular initiative is dependent upon our efforts to support our outstanding faculty. We must increase the size of the faculty to allow us to reduce class sizes, particularly in those areas that offer more opportunities for students to connect theory and practice. A lower faculty-to-student ratio also will provide more opportunities for tutorials, seminars, directed readings, independent studies, and mentoring for more personal, engaged learning experiences that allow students to connect theory to practice. In addition, we will increase resources for faculty professional development and scholarly work. Finally, in order to recruit and retain top faculty talent, we will ensure that our faculty compensation increases accordingly as our competitive position improves among our peer set.



The Columbus Initiative: Young students as well as the OWU student tutors learn about the world in which we live while participating in this volunteer program.

### INTERNATIONAL ENGAGEMENT

With a keen appreciation for the increasingly interdependent global community in which our students will live and work in the years ahead, we will significantly expand opportunities for them to gain international exposure as part of their OWU experience. We will increase opportunities for international experiences including semesters of study abroad, short-term study-travel experiences during mid-term breaks and the summer, volunteer experiences in developing countries, and travel with faculty and classmate as part of particular courses. This spring we will offer three courses that include international travel for the students enrolled in the courses. Our students must hone skills that will enable them to thrive in a global environment where they regularly interact with individuals and organizations representing other nations and diverse cultural heritages. We will encourage students to develop tolerance and understanding of diverse perspectives, and to communicate with sensitivity and empathy.

### TIGHTLY KNIT COMMUNITY

At Ohio Wesleyan, we consider it vitally important to provide co-curricular opportunities that contribute to the development of the whole person and that build a strong sense of community on our campus. We will increase the resources available for these programs to foster a vibrant, close-knit community environment. Our intention is to increase student satisfaction as we help them discover their passion. Success in this area will be measured by increased retention, graduation rates, and engagement among young alumni.

Stuyvesant Hall



Architectural rendering of OWU's Meek Aquatics and Recreation Center, now under construction.

## IMPROVING THE LIVING AND LEARNING ENVIRONMENT

Our strategic plan calls for renewal of our physical campus as the laboratory for learning. In 2009, we broke ground on the Meek Aquatics and Recreation Center, the first all-new construction at Ohio Wesleyan in nearly a decade, with an expected completion in 2010. This facility will not only house the varsity swim teams, but it also will become a focal point for campus and community fun and fitness—a wonderful gathering place for all of our students. The Meek Center is the University's first "green" building, heated and cooled by geothermal energy from go wells.

Ohio Wesleyan understands that the shared experience of residential life is essential to the personal growth and sense of community at OWU. We have begun planning for the renovation of Stuyvesant Hall, a long-awaited initiative that will preserve one of the University's most treasured architectural landmarks. Our plan also includes the restoration and refurbishment of other living spaces—residence halls, small living units, and fraternity houses—to make them more conducive to the establishment of learning communities and to give students more opportunities to interact informally and feel a greater sense of belonging. Our goal is to increase on-campus residency to nearly 100 percent. We will also enhance Greek life with clear understandings and expectations of mission, program, and accountability.

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Over the next decade we will devote resources to the academic side of campus as well. Our plans call for the renovation of University Hall to make it fully accessible, and in the longer term, we are looking at plans to renovate and reopen Merrick Hall, another historic landmark on the OWU campus. We will devote resources to several academic venues, specifically Phillips Hall, Chappellear Drama Center, and Sanborn Hall, to create better teaching spaces.

Our wide-ranging plans include a focus on student transitions and leadership, as well as health and well-being. Our educational mission includes encouraging all members of the OWU community to develop healthy lifestyles, and to participate in wellness programs. We also must invest in the ever-changing field of technology in our effort to support teaching and improve administrative efficiency.

Our bold plans and objectives will require us to seek out and secure new resources to build the OWU Endowment. Our donor base must be replenished, and we will explore new avenues to reach out and connect with our many constituencies, whose support is vital.

The strategic plan is broad, yet it ultimately focuses on our people and the distinctive qualities of the OWU experience. The decade ahead presents limitless opportunities for our faculty, staff, and students to capitalize on their strengths and discover new avenues for learning, leadership and service.





# LIFE CHANGING

# BE OWU

Be proud . . . of this exciting time for Ohio Wesleyan, and of your part in making your Alma Mater what it is today, and what it will become for future generations. We are confident in our vision for this great university, and ever thankful for our incredible community of alumni, students, staff members, and friends whose generosity and ongoing support grace the pages of this year's Report of Donors.

This is Ohio Wesleyan's time to shine.