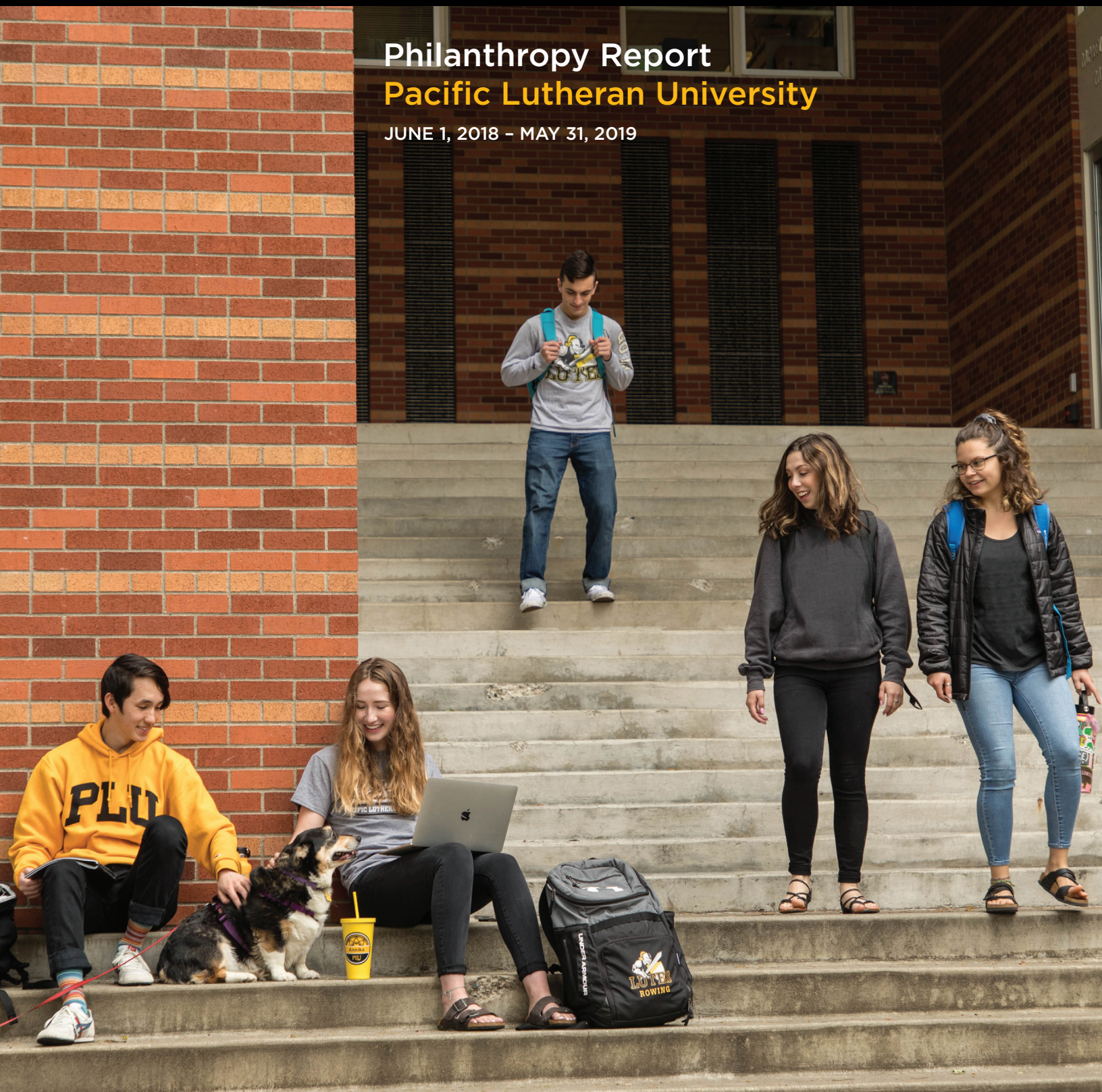




YOUR INVESTMENT IN THE FUTURE OF PLU

Philanthropy Report Pacific Lutheran University

JUNE 1, 2018 – MAY 31, 2019



YOUR IMPACT

Investments rise and fall, but an education lasts a lifetime.



Your giving creates something that will always last. You provide scholarships to open doors of access and opportunity. You build spaces where learning and innovation happen. You support exceptional faculty who excel at the craft of teaching. You

create experiences outside the classroom, where concepts collide in complex ways. **You make student success both a possibility and a reality.**

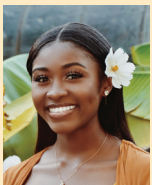
Thank you!

Allan Belton
President



Grants from the **Wang Center for International Programs Endowment** and the **Severtson/Forest Foundation Fellowship** enabled a faculty-student team to research resilience among Central American

migrants in the Pacific Northwest. **Dr. Jordan Levy** and **Sandra Estrada '20** presented their findings at the prestigious Latin American Studies Association Annual Conference in Boston.



Olivia Egejuru '19 intended to study at PLU for two years and then transfer to a state university because she couldn't see herself affording the rest of the tuition. But with support including the **Richard and Lynn**

Ostenson Endowed Scholarship, she graduated from PLU. Olivia says "This scholarship has made me the first in my family to graduate with a college degree. It has fueled my confidence and inspired my passion to further my career goals in the field of science."

BJUG DAY OF GIVING

2018  **2019**
\$718,771 **Total gifts & pledges** \$932,116
1,060 Donors 1,359 Donors
plu.edu/bjugday

GIVING TO PLU 2018-19

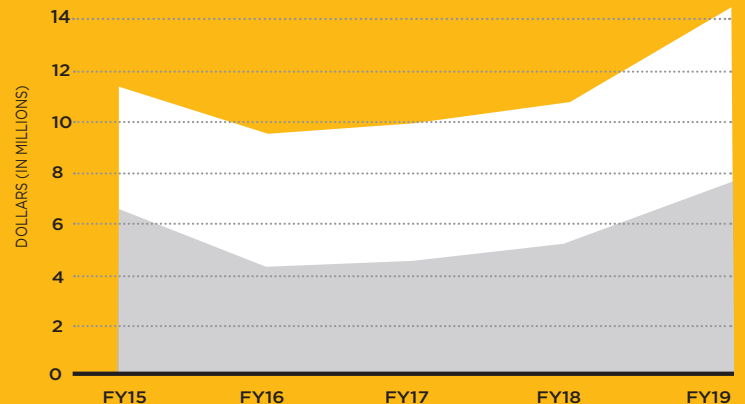
\$14,266,759

TOTAL GIFTS & COMMITMENTS

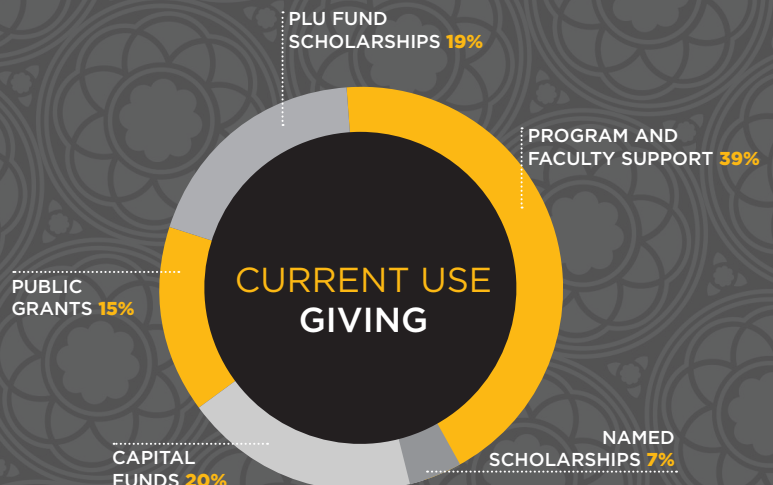
7,097
DONORS

373
FUNDS

PLU has two sources of gift revenue: endowment annual distributions and current use gifts. Endowments provide consistent support in perpetuity, ensuring stability for the future of the university. Current use gifts are available right away and enable the institution to achieve its immediate goals. Giving to both sources provides invaluable support for PLU and its mission – to educate students for lives of thoughtful inquiry, service, leadership and care.



	Endowment Commitments	Current Use Commitments	Combined Total
FY15	\$6,653,030	\$5,002,265	\$11,655,295
FY16	\$4,361,573	\$5,522,531	\$9,884,104
FY17	\$4,462,247	\$5,533,565	\$9,995,812
FY18	\$5,360,988	\$5,092,959	\$10,453,947
FY19	\$7,600,638	\$6,666,121	\$14,266,759



ENDOWMENT MANAGEMENT

PLU's endowment consists of assets invested over the long term to provide both immediate and permanent support for the university.

The endowment segregates investments into three main asset classes – equities, fixed income securities and real assets – for purposes of monitoring key market exposures within the portfolio. To adapt to shifts in the economy, PLU employs a simplified approach in which many investments are directed into indexed funds.

Spending from the endowment is a critical source of PLU's annual revenue,

creating an objective for stability. The current rate of spending, established by the Board of Regents, is an annual distribution at 4.5% of assets for fiscal year 2019, applied on a 12-quarter average of the market value.

The investment portfolio return is intended to maintain purchasing power (inflation) and offset draws (spending). Therefore, the total return aims to exceed inflation plus 4.5% annually.

A comprehensive investment and spending policy guides the management of the endowment.

\$97,215,000

Market value on 5/31/19

\$5,492,000

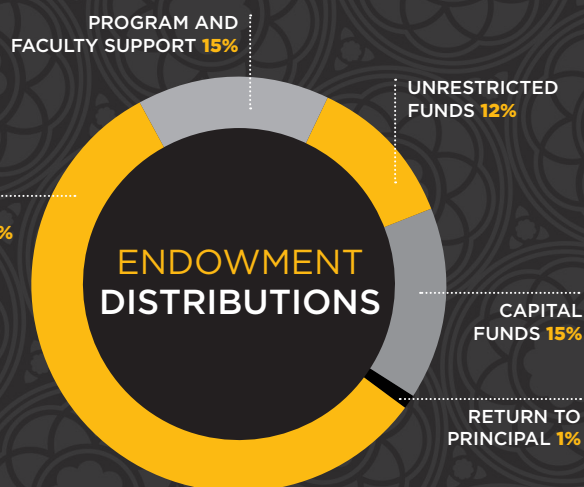
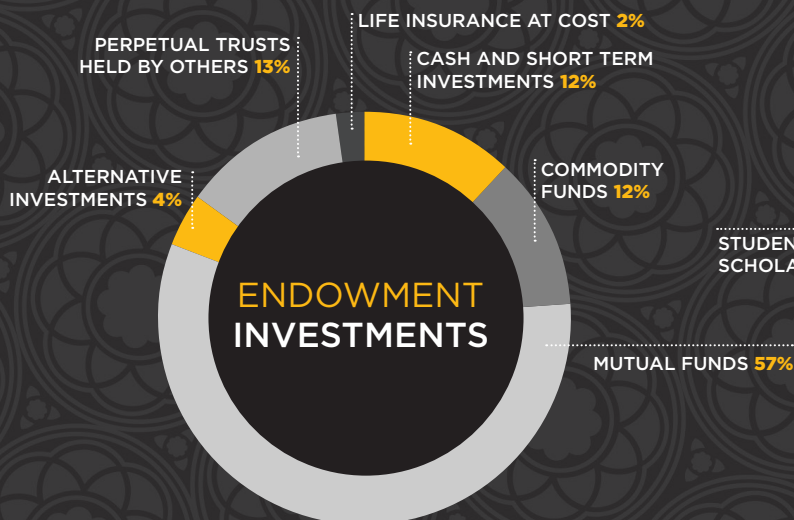
Distributed in FY19

\$117.77

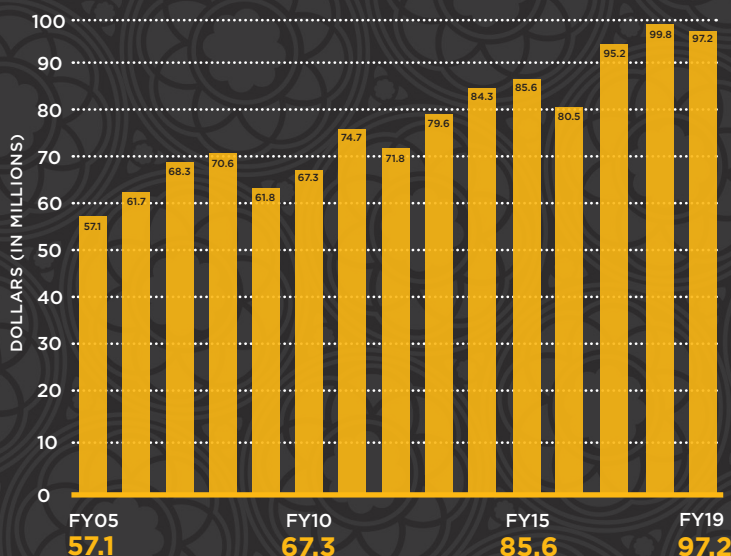
Market value per unit

4.5%

Spending rate



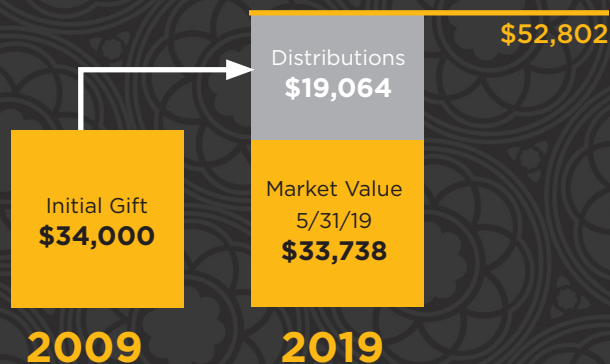
ENDOWMENT PERFORMANCE



ENDOWMENT VALUE CREATION

10-year Example

Karen Phillips Student-Faculty Research Fund in Nursing
Established in 2009 with a gift of \$34,000, the fund generated \$19,064 in distributions in its initial decade. The total value created includes both the current market value and the many student-faculty research opportunities supported by the fund.



CONTINUE YOUR IMPACT

Your support for scholarships and programs at Pacific Lutheran University helps meet the university's highest priority: providing the opportunity for all students to develop their full potential. Your generosity rewards the bright student who may otherwise choose to attend another university, the talented student who gains hands-on faculty-mentored research experience, the hard-working student who has exhausted all means of financial aid, and thousands of other PLU students pursuing their dreams inside and outside of the classroom.

Gifts to the endowment will exist in perpetuity, ensuring the stability and quality of our university for generations to come. We deeply value your

investment and are committed to working with you to ensure your generosity generates your intended philanthropic impact.

Would you be interested in learning more about how additional gifts to your fund can make a difference for PLU and our students?

Growing your fund supports students even more over time and is easily done by making a single gift, annual investments, or designating a future gift through your estate.

We invite you to contact a member of the advancement team today to discuss how to further your impact for our students!

COSTS 2019-20 UNDERGRADUATE

TUITION AND FEES	\$43,674
ROOM AND MEALS	\$10,876
TOTAL	\$54,550

\$96 MILLION in financial aid administered from all sources, including more than \$61 million in PLU-funded scholarships and grants for 2018-19

\$36,812 is the average financial aid offered in 2018-19
(from all sources, including scholarships, grants, work study and loans)

POINTS OF PRIDE

TOP 10 BEST VALUE in the West
U.S. News & World Report

90% of graduates either employed or accepted into graduate school within six months

#1 lowest student debt among Washington private colleges

#1 best college for job placement in Washington in 2018



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