



YOUR INVESTMENT IN THE FUTURE OF PLU

Philanthropy Report
Pacific Lutheran University
JUNE 1, 2019 - MAY 31, 2020



YOUR IMPACT

You are an important investor in PLU and our community.



I am honored to share with you both the good work that you make possible, and also the care we take in stewarding your investment. Even in a global pandemic, the endowment finished the year at over \$100 million for the first time ever.

Endowed funds are, and will continue to be, vital resources to enhance academic experiences and co-curricular learning opportunities. Lutes in turn exemplify ethical character, care for others, global perspectives, and thoughtful service to the common good. Your collective support for the PLU community forms a lasting impact. Thank you!

Gratefully,

Allan Belton
President

GRATITUDE SPOTLIGHT

PLU alumni share the impact of donor support.

Investment in education is unique because you're not buying a tangible object, but rather enabling a young mind to start their journey with the best tools to do so. I cannot thank you enough for how your philanthropy directly impacts my life and the work I do. I hope to continue carrying the PLU legacy with pride and gratitude for those who have supported me along the way.

- Kameron Jacobs '14

I truly credit your scholarship with setting my life on the trajectory it is on now, and I couldn't be more grateful. I don't take your generosity lightly, and I strive to honor it as I move through life. My successes are also your successes.

- Hannah (Jeske) Rankin '16

Read more at plu.edu/scholarship-alumni

BJUG DAY OF GIVING

2019
\$932,116
1,359 Donors



2020
\$1,062,783
1,807 Donors

GIVING TO PLU 2019-20

\$11,869,228

TOTAL GIFTS & COMMITMENTS

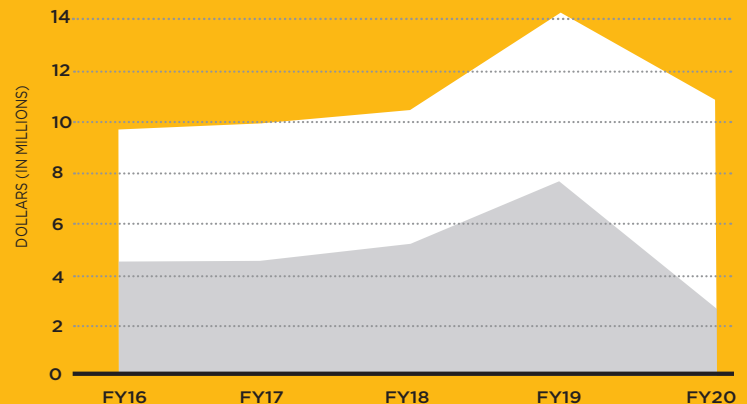
7,651

DONORS

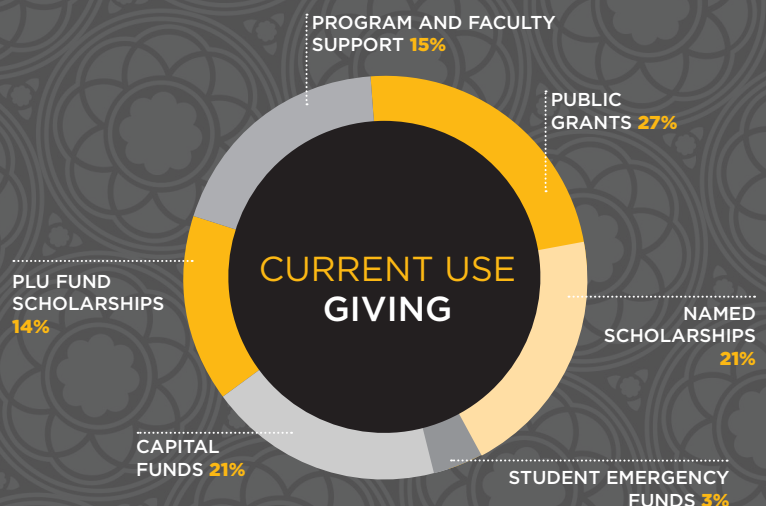
357

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
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
FY20	\$2,637,938	\$9,231,290	\$11,869,228



PLU FUND SCHOLARSHIPS 14%

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 2020, 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, or about 7% total.

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

\$100,857,000

Market value on 5/31/20

\$3,795,000

Distributed in FY20

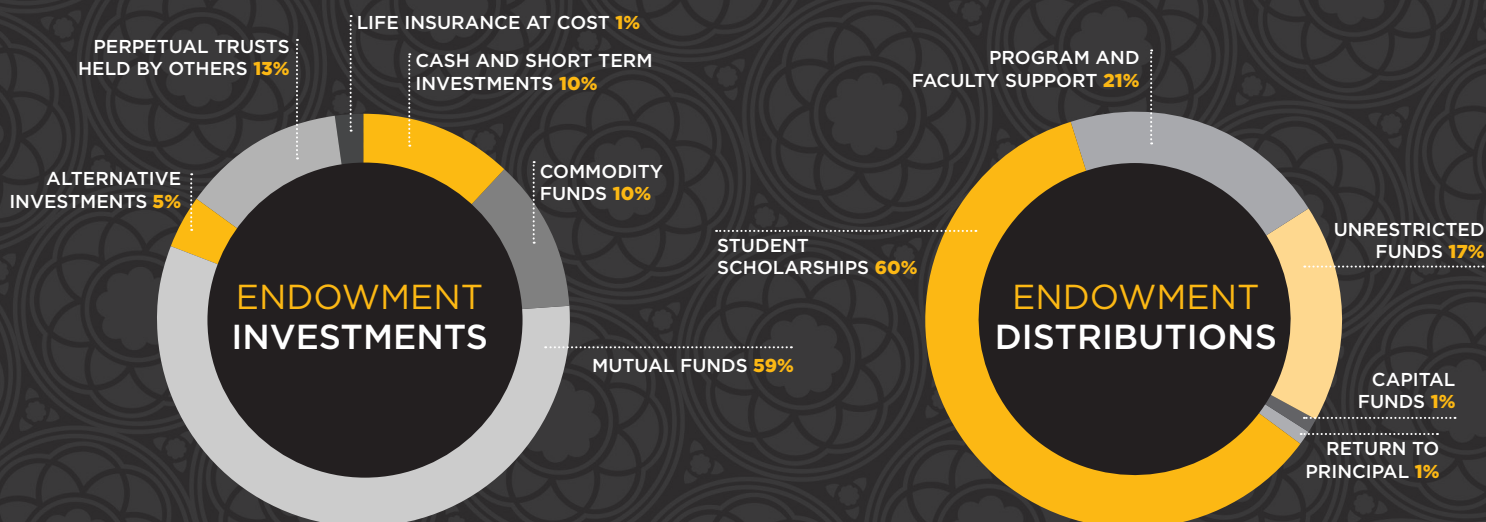
\$123.08

Market value per unit

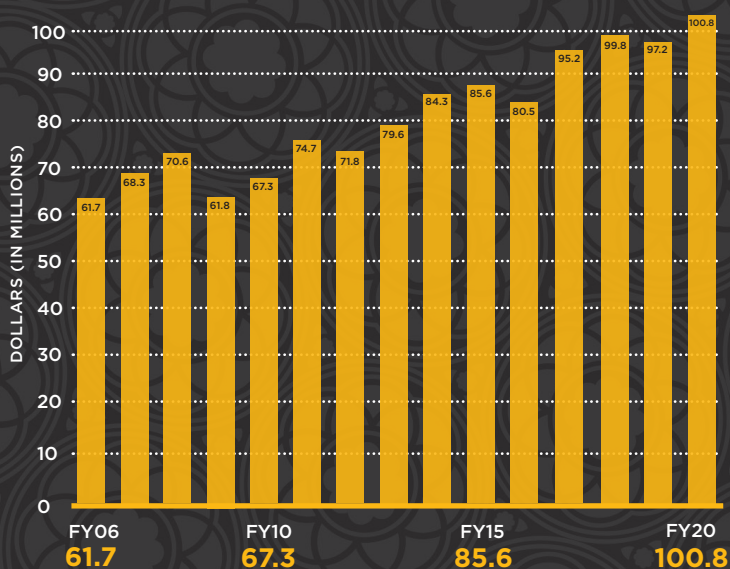
4.5%

Spending rate

Effective June 1, 2020, the distribution for some funds paused, which will be reflected in fiscal year 2021 distributions.



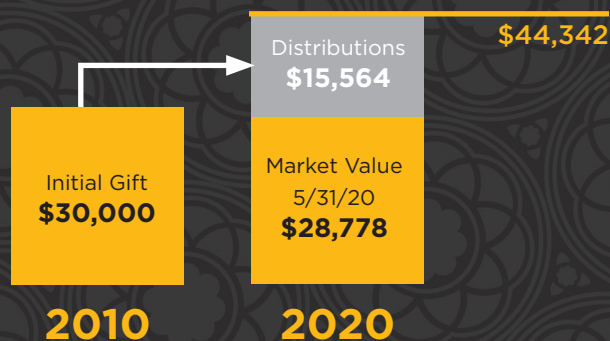
ENDOWMENT PERFORMANCE



ENDOWMENT VALUE CREATION

10-year Example

Mary Elaine and Erling Anderson Scholarship
Established in fiscal year 2010 with a gift of \$30,000, the fund generated \$15,564 in distributions in its initial decade. The total value created includes both the current market value and the many Nursing and Religion student scholarships 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 Lutes to develop their full potential. Through PLU, students find and pursue their vocation to improve not only their life, but that of their family and community. You enable students to gain access to a distinctive PLU education — guided by inquiry, service, leadership and care — to pursue 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 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. You can also increase your immediate effect through a current use gift to add support beyond the annual distribution.

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

COSTS 2020-21 UNDERGRADUATE

TUITION AND FEES	\$46,850
ROOM AND MEALS	\$11,150
TOTAL	\$58,000

**\$62
MILLION**

in financial aid administered from all sources, including more than \$59 million in PLU-funded scholarships and grants for 2019-20

\$37,075

is the average financial aid offered in 2019-20
(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

42%

first generation college students

#1

lowest student debt among
Washington private colleges

70%+

of students volunteer in the local
community



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