Stronger than Ever

Thanks to private gifts, Penn State and Penn Staters are changing the world—and our institution.
A gift to Penn State is made every 1 minute 42 seconds.

Last year, gifts came to Penn State from 60 countries.

Total Donors

- 1984: 67,387
- 2014: 185,415

Generations that Give

Baby Boomers helped Penn State to grow when they enrolled in the 1960s and 1970s—and they’re helping the University to grow now with their gifts. Older and younger donors are also supporting the next generation of Penn Staters.

- Silent and Greatest (born before 1945)
- Baby Boomers (1946–1964)
- Generation X (1965–1976)
- Millennials and Generation Z (1977–present)

Majors with the Most Donors (1984–2014)

- 1. Accounting
- 2. Marketing
- 3. Electrical Engineering
- 4. Elementary and Kindergarten Education
- 5. Mechanical Engineering
- 6. Finance
- 7. Secondary Education
- 8. Civil Engineering
- 9. Journalism
- 10. Biology

By the Numbers

- Fiscal Year 2014 donors for whom birth years are available
  - Millennials/Gen Y/Gen z: 17%
  - Gen X: 41%
  - Baby Boomers: 25%
  - Before 1945: 17%

To learn more about Penn State philanthropy, please visit [giveto.psu.edu](http://giveto.psu.edu)
I wouldn’t be writing this message to you today without philanthropy. My own Penn State education was made possible by scholarship support, and it allowed me to go on and earn an M.B.A. from the University of Cincinnati and a J.D. from the University of California, Berkeley. Even though my life and my legal career led me to the West Coast, I never lost touch with the institution that helped me to take the first steps forward. When I could, I gave other students the same opportunity I had by creating scholarships at Penn State. And I found that experience so rewarding that I wanted to become a fundraising volunteer and help other alumni and friends find their own ways to give back.

Now, as chair of the Penn State Advisory Council on Philanthropy’s executive committee, I’m proud to be building on the success of For the Future: The Campaign for Penn State Students and the achievements of the donors and volunteers responsible for its historic total. The end of the campaign represents a new beginning for fundraising at the University. We know now that there is no limit to what Penn Staters can achieve together, and we are seeing the impact of private support across the University’s missions of education, research, and service.

This inaugural issue of We Are, our new philanthropy publication, tells the story of that impact on our campuses and overseas, in the lives of students and in the lives of alumni and friends who support them. We’re also providing some practical guidance on new ways that you can support Penn State, from planning a gift to pooling your funds with those from other donors. The campaign may be over, but the drive and dedication of our students, faculty, and staff continue. With your support and their ambition, we can keep Penn State on the path from good to great.

Sincerely,

Martha Barnhart Jordan
Class of 1976, Smeal College of Business
$2.188 billion. When all the gifts were counted and all the numbers tallied, the University concluded For the Future: The Campaign for Penn State Students on June 30, 2014, with that breathtaking total. More than 604,000 donors over the seven-and-a-half year effort had pushed Penn State into the elite ranks of fundraising: Only a dozen other public universities had ever raised over $2 billion in a single campaign. And none had done it with so many alumni behind them. More than 176,000 Penn Staters supported For the Future, the highest number of alumni donors to any higher education campaign.

For the Future may have rewritten the record books, but it’s far from history. Penn State is just starting to experience the impact of the campaign’s success, says President Eric Barron, who began his tenure as the University’s 18th President last May as the fundraising effort was coming to close. “When I arrived at Penn State, I could feel the excitement about the campaign’s success in the air,” he says. “Now, though, is when we’re seeing the real excitement starting to grow, as our students and faculty realize just how much they can achieve with our donors’ support.”

Since For the Future began in 2007, more than 45,000 undergraduates have already benefited from the campaign’s focus on ensuring access to a Penn State education—and from the $530 million it raised for scholarship support. More than $135 million of that gift total secured matching funds through the Trustee Matching Scholarship Program, and nearly 5,000 students each year now receive these need-based awards.

Faculty, too, are fulfilling their ambitions as educators and researchers thanks to For the Future. Donors created sixty-six new endowed faculty positions during the campaign, including forty Early Career Professorships. Gifts to create these endowments, which support emerging faculty stars, leveraged a 1:2 match from the Faculty Endowment Challenge. The success of these matching programs during the campaign has led to their continuation, and donors can still leverage University funds when they create Early Career Professorships and Trustee Scholarships.
Because they have been invested to produce income in perpetuity, the endowments created during For the Future will continue to fuel ambition and achievement throughout the life of the University, but the campaign's impact will also be visible on Penn State’s campuses for years to come. Penn State Hershey Children’s Hospital is now welcoming thousands of young patients to its state-of-the-art, family-centered new building, made possible by a $65 million fundraising effort that concluded during the campaign. Penn State’s new NCAA Division I men’s and women’s hockey teams concluded their 2014–2015 seasons with winning records at home in the Pegula Ice Arena, created with the campaign’s single largest gift and regarded as the best facility of its kind in college sports.

And no landmark better embodies the enduring, evolving impact of For the Future than The Arboretum at Penn State, which has become a reality after a century of hopes and plans thanks to campaign gifts. With the H.O. Smith Botanic Gardens, the Childhood’s Gate Children’s Garden, and other plantings made possible by philanthropy now open to the public, the Arboretum will continue to grow over the decades ahead through private giving—like the University itself. “The campaign has prepared the ground for the next era of Penn State’s achievements,” says President Barron. “It’s now up to all of us at the University to make the most of the opportunities that our donors have created through their gifts to For the Future.”
The Penn State Future Funds

From helping undergraduates who are facing crises to supporting broad institutional needs, the University’s alumni and friends are keeping Penn State and Penn State students moving forward with support for the Future Funds. Gifts that are unrestricted—not directed to any specific purpose or program—are pooled together in these funds. In addition to the University-wide Future Fund, administered at the discretion of President Eric Barron, every college and campus has a Future Fund that allows its leaders to meet challenges and opportunities as they arise.

“The range of initiatives the Future Funds enable across our twenty-four campuses is really quite amazing,” says Ann Lehman, the executive director of Penn State’s annual giving program. “I think that many of our donors and even some of our staff would be surprised to learn just how far this range extends.” The Future Funds are especially important in today’s funding climate, which leaves little breathing room in Penn State’s general budget for unanticipated expenses. They provide the University with a rare but vital pool of discretionary funding for a wide variety of needs.

Last year, these needs were often quite personal. The Future Funds provided emergency gap funding for students facing extraordinary and unexpected hardships, such as a job loss, a house fire, or a family member’s illness or death, that challenged the students’ ability to cover the cost of their Penn State education. Thanks to the Future Funds, colleges at University Park and campuses throughout the Commonwealth were able to lend a helping hand. Emergency student aid makes up a significant proportion of what the Future Funds support: as of this spring, $250,000 or close to 30 percent of the total year-to-date expenditures from the University-wide Future Fund had been used for this purpose.

In addition to helping students weather personal challenges, the Future Funds have also built a sense of community through the President’s New Student Convocation, held last August in the Bryce Jordan Center. As the first convocation of Dr. Barron’s tenure, this event represented an opportunity to reimagine a Penn State tradition from the new President’s perspective. The Future Funds have also encouraged shared spirit with support for the Blue Band and the African American Music Festival, organized by the School of Music. Over the years, unrestricted gifts have been directed to faculty and student research, new teaching space at Shaver’s Creek Environmental Center, and restoration of the Nittany Lion Shrine.

Donors who support the Future Funds aren’t just making a difference on Penn State’s campuses today—they’re encouraging the next generation of alumni to think about how they can make a difference, too. Unrestricted gifts have allowed the Student Philanthropy Council, a volunteer student organization, to promote the idea of giving back among Penn State undergraduates. Lehman, who advises the group, says, “Thanks to the Future Funds, these students are seeing how much difference a gift of any size can make—and they’re going to take that message with them into the rest of their lives.”
Ten years and three degrees—what’s your secret to managing stress?
I bought a puppy named Shredder and his personality fits the name. He’s actually a great teaching tool—I bring him in sometimes to reward my students.

What was your proudest moment as an instructor?
I just received my first wedding invitation from a former student. Getting to stay in touch with my students and see how they’re changing the world—that makes me really proud.

If you could create a new class at Penn State, what would it be?
A general “Life will be OK” class. Penn State is high-caliber, and students can get overwhelmed and lose sight of what they’re capable of. I think it would be helpful just to tell them “It will be OK” every week for a semester.

What is your favorite Creamery flavor?
Peachy Paterno, always.

Janelle Applequist came to Penn State as an eighteen-year-old undergraduate. With scholarship support from the Arthur W. Page Center Endowment in the College of Communications and a Harold F. Martin Graduate Assistant Outstanding Teaching Award, she leaves this May a twenty-eight-year-old with a B.A., M.A., and Ph.D. and a focus on health and international communications. Here, she talks proud moments, secret dreams, and what it means to be a Penn Stater.

What has philanthropy allowed you to do that you couldn’t have done otherwise?
The teaching award allowed me to take a step back and, for the first time, really look at what I was doing right in the classroom.

If you could create an endowment at Penn State, what would it support?
Students who are working while obtaining their degree. Something to reward how motivated they are, because that’s not an easy undertaking.

What is the most useful thing you’ve learned at Penn State?
Penn State has the ability to make you a really good individual. Because the people here are amazing. They’re kind and supportive, and when you’re around that for ten years, you want to be like that, too.

Fill in the blank: We Are Penn State! And Penn State is ________.
Penn State is me. Penn State made me the woman I am today. This is my community, these are my people.
Since Penn State’s first modern fundraising campaign began in 1984, philanthropy has supported the achievements and growth of more than 5,500 student-athletes across the University’s thirty-one intercollegiate sports and thousands more who participate in club teams and recreational athletics. From individual scholarships, such as the Kelly Sunderland Curtin Endowed Fund for Cheerleading, to facilities like the Lorenzo Wrestling Complex, private giving continues to help undergraduates both on and off the field. Earning 32 national championship titles and 153 Academic All-American titles over the last thirty years, our student-athletes represent the spirit of Penn State Intercollegiate Athletics—and the spirit of those fans and friends who have invested in their success.
We Are... Everywhere

Students and faculty come to Penn State looking to change the world. Philanthropy allows them to do it. Here are just a few examples of how private support is connecting Penn Staters to communities around the globe.

Faculty awards provide vital funds to extend learning and discovery beyond the classroom. The W. LaMarr Kopp International Achievement Award was created by Dr. W. LaMarr Kopp ’65, the late deputy vice president for international programs at Penn State, and his wife, Dr. Nel Kopp. In 2013, professor of geography Robert Crane received the award in part for his work as director of the Alliance for Education, Science, Engineering and Development in Africa, an effort that integrates Penn State research with education and aims to improve the human condition and economic vitality for African populations. Dr. Crane also established the Center for Advancement of Undergraduate Studies and Experience. With philanthropic support, the center sponsors a three-semester course giving College of Earth and Mineral Sciences students the opportunity to create, plan, and execute an international research project. Here, students examine the health of coral reefs in Willemstad, Curaçao.

Established by alumna Diane Cressman Blanton, the GO! Global Opportunity Award supports students in the College of Agricultural Sciences who choose to study internationally. “Studying at University College Dublin allowed me to explore unforgettable landscapes I never would have seen otherwise,” says Veterinary and Biomedical Sciences major and award recipient Michelle Morelli. “I gained an invaluable global perspective on agriculture.”

As part of an annual exchange program at Penn State Abington, students in Criminal Justice 499 travel to Bucks New University in England to examine the British criminal justice system. This is supported by the Maryann T. Colavita Global Programs Endowment, the Taub International Travel Fund, and unrestricted gifts to Global Programs at Penn State Abington.

“Development of emergency care and infrastructure is a public health intervention that can offer aid during disease outbreaks. The Mark J. Young Scholarship allowed me to travel and work in Africa where I connected with people from all over the world who are studying emergency medicine,” says recent recipient and resident Dr. Brad Peterson. This scholarship was created by College of Medicine faculty Dr. Vernon Chinchilli and Dr. Thomas Lloyd to honor the passing of Mark J. Young, a colleague and formative leader in the field of international health policy.

With support from the Douglas Simon and Peter Regopolous Travel Fund for International Study, Penn State School of Hospitality Management students travel during spring break each year to Macau, China, where they learn about the Asian gaming industry. They have the unique opportunity to tour casinos and meet with gaming executives while also exploring the local culture.
What are some gift planning options that are well suited for younger donors?

Well, we have a couple of attractive options. The first category includes both bequests and beneficiary designations. These gifts are very flexible: you don’t have to be wealthy to make them, and you always retain control over them. Making a bequest is simply writing a gift to Penn State into your will. A beneficiary designation is what we call a bequest substitute, and to do one, you don’t have to update your will. Instead, you designate Penn State as a beneficiary of, say, a life insurance policy or your IRA or 401k plan. We call them “stroke of the pen” gifts because they involve just a line on a beneficiary form, and they can be changed at any time.

Younger donors can also consider supplementing their retirement accounts with a deferred gift annuity. This allows donors to put as little as $5,000 into a gift that will start paying them income at an age when they’ll need additional retirement money. These are also very flexible. When donors establish a deferred gift annuity, they can pick an age range—say it’s 65 to 75—and when they reach 65, if they don’t need the income yet or want to hold off for a higher payment, they can defer until a later date within that range. Also, many donors ladder these annuities, creating new ones each year over five or ten years to build up a larger pool of funds. In any case, when the donor passes on, the remaining funds go to the college or program at Penn State the donor has chosen to support, establishing their legacy at the University.
The impact of Penn State philanthropy is visible across social media, including Facebook, Twitter, and Instagram. From a young donor using her allowance as her first gift to Penn State to students spending forty-six hours dancing for a cure to pediatric cancer at THON, the generosity of Penn Staters is all around us. Here is a snapshot of some of our favorite social media posts. If you would like to share your Penn State philanthropy story with us, include #WeAreGiving, and your post could be featured in our next issue.
“Without help from people like those of you who sit in this room, I have no idea where I would be at this moment. I do not believe I am an exceptional student who overcame exceptional circumstances… I am a regular student who, like many other students here at Penn State and across the nation and world, have had to overcome the challenging costs of higher education…. On behalf of myself and the many students I’ve met who are daring to dream big, but who couldn’t do it alone, I want to say, ‘Thank you.’”

Jordan Chapman ’15, McNair Scholar and recipient of the Chaiken Trustee Scholarship, the John T. Ryan, Jr. Scholarship, the John C. and Marilyn B. Redmond Scholarship, and the John and Elizabeth Holmes Teas Scholarship

When Jordan Chapman, a senior Anthropology major, addressed the members of the Mount Nittany Society on April 25, he spoke for the thousands of grateful undergraduates who benefit from scholarship support at Penn State. These students also have the chance to thank alumni and friends directly through the many ways in which the University connects scholarship donors with recipients of their support: not only gala events like the annual Mount Nittany Society dinner, which honors the University’s leading donors, but also letters from students, campus visits, and informal gatherings. If you’d like to learn firsthand about how you are making a difference in the lives of students, the Office of Donor Relations can help. Please contact Kris Meyer, executive director of donor relations and special events, at klm31@psu.edu or 814-863-4310.