



# Humboldt State University Foundation

## Endowment Report FY 2019-20

HUMBOLDT STATE UNIVERSITY  
FOUNDATION

# "A place that embodies what a sustainable campus is while reinventing higher education for the next generation."

**President Tom Jackson, Jr.**

Presidential Investiture, January 15, 2020

## On behalf of the Humboldt State University Foundation, we are pleased to report on the performance of your endowment.

Thanks to the generous and visionary giving of HSU donors like you, the Humboldt State University Foundation endowment has grown to \$32,870,583 as of June 2020. The impact of your giving has enhanced the HSU student experience and provided support across campus, including student scholarships, internships and field work, lab experiences, new and emerging technology, reimagined and innovative academic offerings, and educating for justice.

The endowment investments generated a return of 2.33% in the fiscal year ending June 30, 2020. We remain committed to socially responsible investing and to the prudent financial management of the philanthropic funds we receive. Significantly, HSU was one of the first universities in North America to sign on to the United Nations Principles for Responsible Investment.

The Foundation's spending policy is to seek to distribute 4.5% annually, based on the 12 quarter moving average market value of the endowment pool.

As we celebrate the amazing talent at HSU and envision a promising future, we are committed to supporting the University and helping make student dreams of earning a degree a reality. Today, the University is defining a future in which it builds upon core strengths and provides global leadership in environmental sustainability, natural resources, arts and humanities, and "learning by doing." Thank you for your help in offering students a path to a better life through a positive, meaningful educational experience.

If you have any questions about your endowment or if you would like to give a current use or endowed gift, or you would like information about how to include HSU in your estate plan, please contact Frank Whitlatch, at [frank@humboldt.edu](mailto:frank@humboldt.edu) or 707-825-5200.

With appreciation,



**Jennifer Harris**  
Chair,  
Humboldt State University Foundation



**Frank Whitlatch**  
Executive Director,  
Humboldt State University Foundation

**HSU is a unique place to live and learn. We provide an affordable, high-quality educational experience. Hands-on learning and community-building emphasize a commitment to tackling social and environmental challenges and preparing students to become leaders who make a positive difference in the world.**

## HSUF Board

Jennifer Harris  
Gary Blatnick '83  
Frank Whitlatch  
Tom Jackson, Jr.  
Robin Bailie '11  
Jay Bower '84  
Kurt Fraese '82  
Kenneth Fulgham '70  
Scott Hunt  
Dan Johnson  
Carin Kaltschmidt '90  
Jennifer Keller  
Jack McGurk '66  
Heidi Moore-Guynup '98  
Eric Ramos '98  
Gary Rynearson '78  
Robin M. Smith '78

# Humboldt State University Foundation

Endowment Market Value (07/01/16) **\$28,018,211.32**

**Fiscal Year Activity '16-17**

New Contributions	\$1,054,184.20
Investment Gains/(Losses)	\$3,822,810.73
Distribution for Endowment Purposes	(\$1,497,845.08)
Endowment Fees	(\$512,802.34)
Endowment Market Value (06/30/17)	<b>\$30,884,558.83</b>

**Fiscal Year Activity '17-18**

New Contributions	\$646,822.94
Investment Gains/(Losses)	\$1,607,643.79
Distribution for Endowment Purposes	(\$1,834,570.64)
Endowment Fees	(\$523,631.03)
Endowment Market Value (06/30/18)	<b>\$30,780,823.89</b>

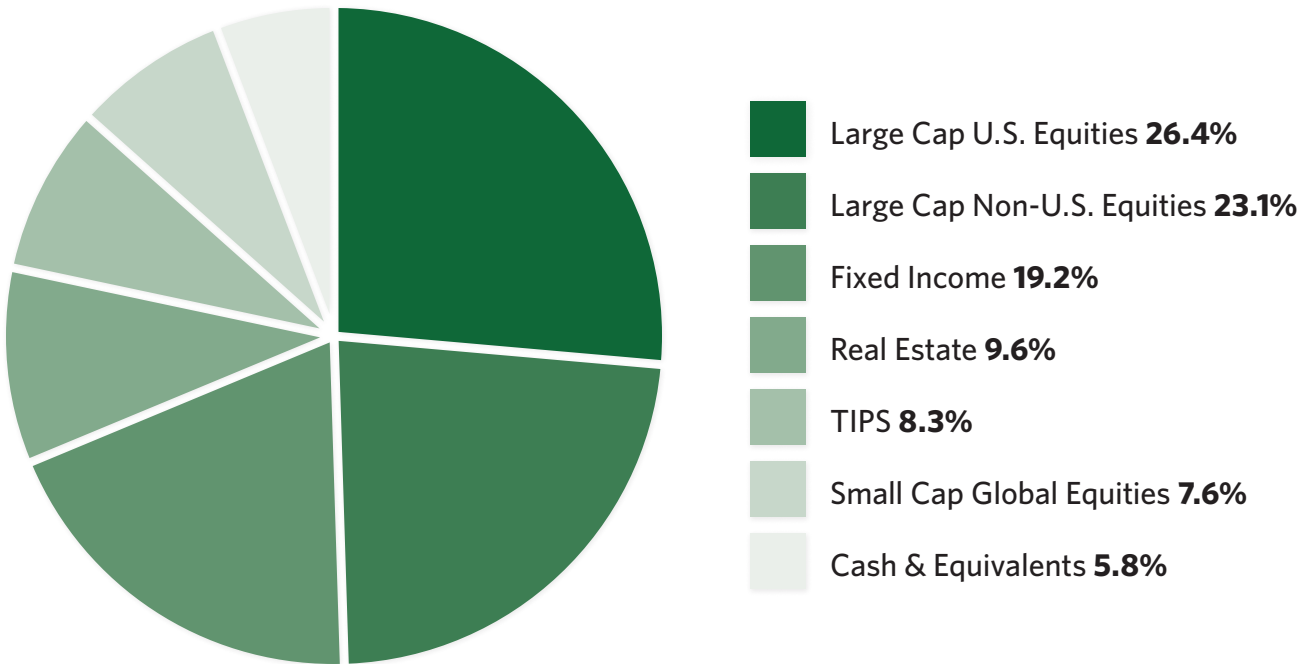
**Fiscal Year Activity '18-19**

New Contributions	\$1,069,335.61
Investment Gains/(Losses)	\$1,352,402.07
Distribution for Endowment Purposes	(\$1,074,153.58)
Endowment Fees	(\$565,481.95)
Endowment Market Value (06/30/19)	<b>\$31,562,926.04</b>

**Fiscal Year Activity '19-20**

New Contributions	\$2,090,037.14
Investment Gains/(Losses)	\$948,252.95
Distribution for Endowment Purposes	(\$1,135,484.87)
Endowment Fees	(\$595,148.76)
Endowment Market Value (06/30/20)	<b>\$32,870,582.50</b>

Today, the University is defining a future in which it builds upon core strengths and provides global leadership in environmental sustainability, natural resources, arts and humanities, and “learning by doing.”







# Thank You!

**Humboldt State University Foundation**  
1 Harpst St  
Arcata, CA 95521  
(707) 826-5200  
[giving@humboldt.edu](mailto:giving@humboldt.edu)

**[giving.humboldt.edu](https://giving.humboldt.edu)**