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Frequently Asked Questions About the Powell Match

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Powell Match FAQs

Still searching for the answers to your questions? Don't worry. We have compiled a list of frequently asked questions just for that purpose.

What is the Powell Match?

The Powell Match was established through the transformative \$125 million Powell Fund, a gift from the estate of Robert and Jeannette Powell. An astute businessman, Bob Powell appreciated an opportunity to leverage his philanthropy to inspire others, and with this program, he continues to do so. The Powells did not graduate from college themselves, yet served as members of the Pacific Board of Regents for many years and believed deeply in the value of a Pacific education. The Powell Fund matches new endowment gifts to Pacific, up to 1:1. More than \$60 million is allocated for endowed scholarship matches and \$25 million for endowed academic program matches.

What is an endowment?

An endowment is a permanent fund at the University established with contributions from donors that will be invested in perpetuity. Each year, a portion of the value of the fund is distributed to support the donor's purpose such as student scholarships or program support. Any earnings in excess of this distribution build the fund's market value. The University's current endowment spending policy is 4.0% of market value. [Learn more about endowments.](#)

What types of endowments qualify for the match?

Endowed funds that provide scholarships or academic support to our faculty and academic programs are eligible for the Powell Match Program. Examples of academic program endowments could include support for a specific department, a faculty position, or student learning opportunities such as academic competitions (e.g., forensics or trial advocacy), a lecture series or experiential learning programs. Examples of scholarship endowments could include gap grants, middle-income scholarships, merit scholarships or study abroad scholarships. From the Powell gift, more than \$60 million is allocated for endowed scholarship matches and \$25 million for endowed academic program matches.

What types and size gifts are eligible for the Powell Match?

Gifts of \$50,000 or more to establish or enhance an endowment may be eligible to receive a Powell Match. Previously unmatched gifts made after October 1, 2012 may be considered for the match if an additional gift or commitment to the endowment is made. Gifts of cash, stock or other assets, including pledges of up to 5 years in length, qualify for 1:1 matching so long as the assets can be liquidated within a 5-year period.

Do I have to make my gift in one payment?

It is not necessary to make your gift all in one payment. However, neither the match nor the distribution will occur until the University has received the minimum \$50,000. Payment schedules of various lengths may be established by the donor with a maximum duration of five years.

How long do I have to fund my endowment?

Once a gift and or pledge agreement is signed, the donor has a maximum of five years to reach the minimum required \$50,000 to guarantee the Powell Match.

Who is eligible for the match?

Gifts from individual donors or couples, a group of individuals, family foundations or family owned businesses are all eligible to be matched by the Powell Fund.

Can more than one person give to the endowment and be matched?

Yes! One or more donors may give to an endowment. Once that endowment reaches the \$50,000 minimum, each and every additional gift will be matched on a quarterly basis for as long as matching funds are available.

Does my employer's company qualify for the match as well?

The Powell Fund will match both your gift and your company's matching contribution. Your company's match can also count toward the \$50,000 minimum to qualify for the Powell Match. So in effect, between the Powell Fund Match and a 1:1 match from your employer, your gift will be quadrupled.

Example: \$50,000 donor gift + employer match + \$100,000 Powell Match = \$200,000 endowment

Do planned gifts (deferred gifts) qualify for the match?

Planned (deferred) gifts are not eligible for matching.

When will the match occur?

The match is made available after a gift or payments received toward a pledge total \$50,000 or more. Your endowment is established in the quarter that the minimum \$50,000 is received. The Powell Match portion is added at the same time.

When will a new endowment start being used?

If the endowment is funded by June 30, it will have a full distribution (currently at 4%) annually starting the fall after one year of investment. If the endowment has met the minimum after June 30, but prior to Dec. 31, the fund will have a half distribution (2%) starting the following fall and then a full (4%) annual distribution each subsequent year.

Gift Amount	Powell Match	Total Endowment	Payment Received	Distribution	Estimated Amount
\$50,000	\$50,000	\$100,000	June 30, 2019	Fall 2020	\$4,000
\$50,000	\$50,000	\$100,000	Dec. 31, 2019	Fall 2020	\$2,000
				Fall 2021	\$4,000

How do I get started?

Contact any University of the Pacific gift officer or Tod Davis, Powell Match Manager, at 209.946.2502 or tdavis@pacific.edu.

UNIVERSITY OF THE PACIFIC

Stockton Campus

3601 Pacific Ave.
Stockton, CA 95211
Admissions: 209.946.2211

Sacramento Campus

3200 Fifth Ave.
Sacramento, California 95817
Admissions: 916.739.7105

San Francisco Campus

155 Fifth St.
San Francisco, California 94103
Admissions: 415.929.6491

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