



Thank You!

Cal Poly Humboldt Foundation
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giving.humboldt.edu



Endowment Report

FY 2022-23

Cal Poly Humboldt
FOUNDATION

On behalf of the Cal Poly Humboldt Foundation and the campus community, I thank you for your charitable giving in support of Humboldt students and programs. I am writing to provide you with this report on the performance of your endowment.

Thanks to the generosity of donors like you, the Cal Poly Humboldt endowment has grown to about \$42 million as of June 2023. Your giving has impacted the student experience across campus. Endowed funds support scholarships, internships, field work, research experiences, new technology, the enhancement of academic offerings, education for justice, and much more.

The Foundation’s policy goal is to distribute 4.5% annually to endowed scholarships and programs based on the 12-quarter moving average market value of the endowment pool. The priority is to provide ongoing support while also maintaining the corpus and adding value to account for inflation. The Foundation once again met its target goal this year with a distribution of \$1.7 million.

In the most recent fiscal year, the endowment investment returns were 7.3%. While we monitor this performance closely and regularly, we remain focused on the long term. We are proud that the Foundation’s investments have generated a long-term return of 6.8% over the last decade, which is in the top 40% of comparable foundations.

The Cal Poly Humboldt Foundation Board is committed to socially responsible investing and to the prudent financial management of the charitable funds that donors contribute. The Foundation Board recently approved a significant new Environmentally & Socially Responsible Investing policy, extending its longstanding effort to invest in a more sustainable way. Humboldt was also one of the first universities in North America to sign on to the United Nations Principles for Responsible Investment.

These are promising and exciting times at Cal Poly Humboldt. Fully 15 new academic programs launched in Fall 2023, including 9 new undergraduate majors, as part of the University’s polytechnic transformation. Just two years ago, the institution was designated the state’s third polytechnic, and the state has made a historic investment to support new programs and infrastructure.

Donors have stepped up to help leverage the polytechnic momentum, giving at record levels in recent years. Just one year ago, the volunteers on the Foundation Board and on the Campaign Cabinet unveiled the University’s first comprehensive fundraising campaign – Boldly Rising: The Campaign for Cal Poly Humboldt. The campaign goal is at least \$50 million within the next two years, and donors have already given more than \$43 million.

Humboldt’s future builds on its 110-year history. The University is leveraging core strengths to provide global leadership in environmental sustainability, natural resources, arts and humanities, and hands-on learning. Thank you for being a part of Humboldt’s important work to offer students a path to a better life through a positive and meaningful educational experience.

If you have any questions about your endowment, if you would like to give an endowed gift or current use gift, or if you would like information about how to include Humboldt in your estate plans, please contact me at frank@humboldt.edu or (707) 826-5200.

With deep appreciation,



Frank Whitlatch
Executive Director
Cal Poly Humboldt Foundation

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Cal Poly Humboldt Foundation

Endowment Market Value June 30, 2018 **\$30,780,823.89**

Fiscal Year Activity 2018–19

New Contributions \$1,069,335.61
Investment Gains/(Losses) *Net of Fees* \$786,920.12
Distribution for Endowment Purposes (\$1,074,153.58)

Endowment Market Value June 30, 2019 **\$31,562,926.04**

Fiscal Year Activity 2019–20

New Contributions \$2,090,037.14
Investment Gains/(Losses) *Net of Fees* \$353,104.19
Distribution for Endowment Purposes (\$1,135,484.87)

Endowment Market Value June 30, 2020 **\$32,870,582.50**

Fiscal Year Activity 2020–21

New Contributions \$2,036,302.78
Investment Gains/(Losses) *Net of Fees* \$8,963,130.76
Distribution for Endowment Purposes (\$1,350,036.12)

Endowment Market Value June 30, 2021 **\$42,519,979.92**

Fiscal Year Activity 2021–22

New Contributions \$1,680,422.68
Investment Gains/(Losses) *Net of Fees* (\$4,116,229.77)
Distribution for Endowment Purposes (\$1,442,944.87)

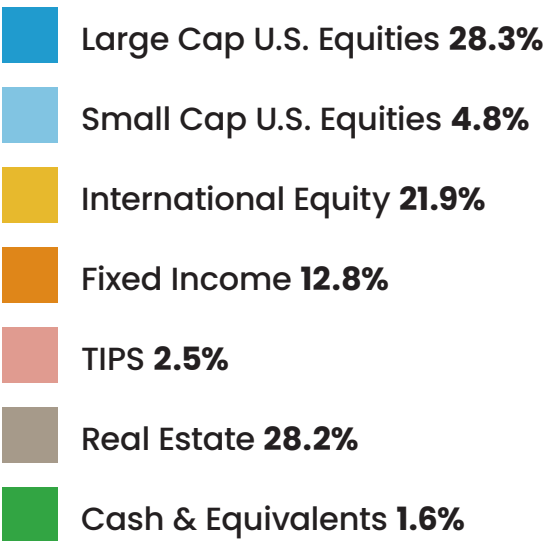
Endowment Market Value June 30, 2022 **\$38,641,227.96**

Fiscal Year Activity 2022–23

New Contributions \$2,657,376.41
Investment Gains/(Losses) *Net of Fees* \$2,264,309.44
Distribution for Endowment Purposes (\$1,684,414.45)

Endowment Market Value June 30, 2023 **\$41,878,499.36**

Allocation as of June 30, 2023



Allocations shown may not sum up to 100% exactly due to rounding.

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