



Thank You!

Cal Poly Humboldt Foundation
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giving@humboldt.edu

giving.humboldt.edu

Endowment Report

FY 2023-24

Cal Poly Humboldt
FOUNDATION

On behalf of the Cal Poly Humboldt Foundation, I thank you for your philanthropic support of Humboldt students and programs. I am pleased to provide you with a report on the performance of your endowment.

The impact of your giving has enhanced the student experience and provided support across campus. As of June 30, 2024, the market value of the Cal Poly Humboldt endowment reached \$44,479,569, which will result in a \$1.86 million distribution in fiscal year 2024-25 to support scholarships, internships and field work, research experiences, new technology, enhancement of academic offerings, and much more.

The endowment investments have generated a long-term return of 6.6% over the last decade, with the most recent fiscal year generating an extraordinary 10.3% return. While we know that investment returns will fluctuate over time, we are proud that Humboldt's investments have outperformed 72% of comparable institutions over the past four years.

The Cal Poly Humboldt Foundation Board remains committed to socially responsible investing and to the prudent financial management of the charitable funds that donors contribute. This fiscal year, the Board approved a significant new Environmentally & Socially Responsible (ESR) Investing policy, providing for an increase in ESR investment allocations and extending its longstanding effort to invest in a more sustainable way.

The Foundation's spending policy 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 goal is to provide ongoing support while also maintaining the corpus and adding value to account for inflation.

Cal Poly Humboldt successfully completed its first comprehensive fundraising campaign, "Boldly Rising: The Campaign for Cal Poly Humboldt." The University surpassed the \$50 million goal one full year early, raising more than \$59 million in support of scholarships and other financial support for students, hands-on learning and applied research, new and emerging technology throughout the curriculum, enhancement of academic programs, and creation of more equitable communities.

Donor support is truly transforming the Cal Poly Humboldt student experience. The generosity shown since the Boldly Rising Campaign started has already led to the four highest years of donor support in our University's history, including the most raised in a single month - \$4.8 million in gifts and pledges in May 2024, showcasing the deep commitment of alumni, parents, friends, and community members.

Humboldt is creating a future in which it builds upon core strengths and provides 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 a current use or endowed gift, or if you would like information about how to include Humboldt in your estate plan, please contact me at Mark.A.Johnson@humboldt.edu or (707) 826-5200.

With deep appreciation,



Mark Johnson
Executive Director
Cal Poly Humboldt Foundation

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Cal Poly Humboldt Foundation

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)

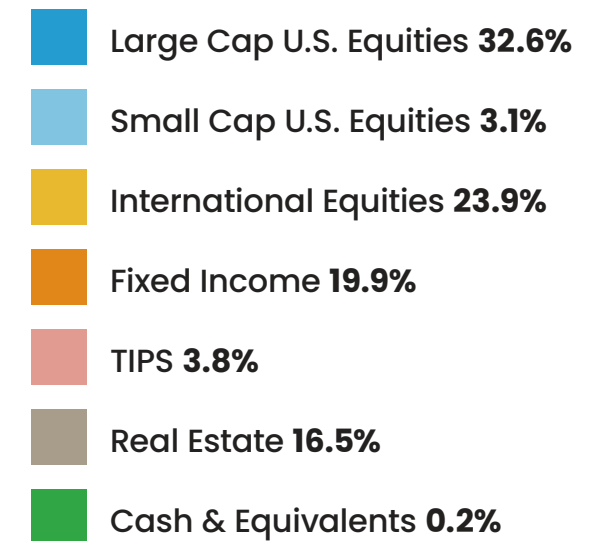
Endowment Market Value June 30, 2023 **\$41,878,499.36**

Fiscal Year Activity 2023-24

New Contributions \$1,106,110.95
Investment Gains/(Losses) *Net of Fees* \$3,199,263.33
Distribution for Endowment Purposes (\$1,704,303.69)

Endowment Market Value June 30, 2024 **\$44,479,569.95**

Allocation as of June 30, 2024



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

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