



CalPoly
Pomona

Cal Poly Pomona Philanthropic Foundation

Fund Minimums



Why set fund and naming minimums?

- **Operational Efficiency**

- Limits the number of low-dollar or zero-balance funds to manage
- Increases the impact and use of available dollars to support students, faculty, and the university

- **Equity and Transparency**

- Provides a university-wide standard
- Ensures all are following the same requirements



Fund Minimums

New Scholarship or Program Fund

10K

New Endowment Fund

501k



Endowment Minimums

Endowment Funds

Cal Poly Pomona Philanthropic Foundation manages a pooled endowment fund to support university initiatives for faculty and students. In order to maintain endowment funds in perpetuity and to generate a sufficient endowment payout annually (see [Cal Poly Pomona Philanthropic Foundation Endowment Investment Policy No. 502](#)), the Foundation has established the following minimum funding amounts to establish a named endowment.

\$50,000 – endowed scholarship

\$50,000 – endowed program or equipment fund

\$100,000 – endowed College or Department Faculty Development fund

\$100,000 – endowed Undergraduate student fellowship

\$200,000 – endowed Graduate Student scholarship

\$200,000 – endowed Lectureship or Seminar Series

\$500,000 – endowed Faculty Fellowship

\$1,500,000 – endowed Professorship

\$2,500,000 – endowed Chair Director

\$3,500,000 – endowed Dean's Chair

\$5,000,000 – endowed University Chair

For more information regarding Cal Poly Pomona Philanthropic naming minimums for both endowed and non-endowed funds, see [Cal Poly Pomona Philanthropic Foundation Naming and Memorial Gift Policy No. 200](#).



Endowment Minimums Continued

Opportunity	Endowment Minimum	Cash/Term Minimum(5 year)	Estate Minimum	Description
University Chair	\$5,000,000	Not permissible	Present Value of Commitment must equal the Endowment Minimum	The University Chair is the highest ranking and most prestigious position in the University. It enables the President to recruit scholars of national and international stature with highly distinguished records of teaching, research, and publication or creative activity in a particular field, or cross-disciplinary fields.



Naming Minimums: Authority

CSU Board of Trustees

1. Academic Programs
2. Colleges
3. Buildings
4. Large Exterior Campus Spaces

University President

1. Funds
2. Centers
3. Interior Rooms and Spaces
4. Minor Exterior Campus Spaces



Resources

- **Cal Poly Pomona Philanthropic Foundation Website:**
www.cpp.edu/philanthropy
- [Guidelines for Naming and New Projects](#)
- [Policy 200: Naming and Memorial Gifts](#)
- **Office of Donor Relations and Stewardship:**
Connie Schmitz cjschmitz@cpp.edu / 909.869.3268

