

PHILANTHROPIC FOUNDATION
STRATEGIC PLAN

2022 - 2027



CalPolyPomona

Philanthropic
Foundation



Members of the Strategic Planning Advisory Committee

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University Advancement Members

Dan Montplaisir, Vice President for University Advancement

Gina Johnson, Executive Director of Central Development

University Staff Support

Diane Rivera, Advancement Operations Coordinator

Diana Saldana, Executive Assistant to the Vice President

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“Education offers the greatest opportunity for really improving one generation over another.”

— W.K. Kellogg

Vision

The Philanthropic Foundation supports the University's Strategic Initiatives by cultivating enduring relationships and securing resources dedicated to producing world-class graduates applying their polytechnic experience to addressing society's challenges and opportunities.



Mission

The mission of the Foundation is to promote, secure and steward philanthropic support for the University.



Values



Relationship: Cultivate strategic relationships with individuals and organizations committed to supporting the success of the University's Strategic Initiatives.



Student Success: Leverage our relationships and resources to impact student success in scholarship, academic endeavors, global community engagement and career aspirations.



Excellence and Innovation: Demonstrate excellence in everything we do and in persistently striving for creativity and innovation in a polytechnic approach.



Stewardship: Meet our fiduciary responsibilities with integrity, accountability, and transparency, growing and maximizing the benefit of resources entrusted to the Philanthropic Foundation.



Diversity and Respect: Maintain a fully engaged Board representing the University's diverse community, mission, and strategic initiatives, operating with integrity in a collaborative and inclusive environment respectful of all voices and ideas.



Strategic Goal Pillars



Promote

Enhance global recognition of the value of both the Cal Poly Pomona Experience and the Philanthropic Foundation through diverse outreach and engagement



Secure

Cultivate strategic relationships that strengthen engagement in University Life and impel increased value and diversity of the Philanthropic Foundation portfolio



Steward

Sustain a highly qualified and engaged Board of Directors whose reputation for transparency and integrity make it a model for service and investment



Promote

Goal 1: Enhance global recognition of the Cal Poly Pomona Experience

- ❖ Articulate the strategic advantages of a Cal Poly Pomona education to prospective donors and the global community
- ❖ Engage with leadership at key current and prospective donor organizations to deepen collaboration and relationships

Goal 2: Increase awareness of the Philanthropic Foundation and its impact

- ❖ Inform and educate external stakeholders about the need for and impact of the Philanthropic Foundation, emphasizing the need to augment state funding with Foundation support in order to achieve Strategic Initiatives
- ❖ Advocate a culture of philanthropy among alumni, students, faculty, staff and broader community
- ❖ Educate industry and external organizations on the concept and benefits of investing in higher education

Goal 3: Diversify outreach and engagement

- ❖ Enhance the University's relationships by increasing outreach efforts in diverse communities to leverage new and existing partnership opportunities



Secure



Goal 1: Expand diverse engagement in university life

- ❖ Identify, encourage, and invite individuals and industry leaders to participate in the life of the University
- ❖ Create opportunities for meaningful interaction among students, alumni, campus leaders and volunteers
- ❖ Support the strengthening of college and other advisory boards
- ❖ Connect alumni and donors to the University through programmatic efforts to build lifelong and meaningful relationships

Goal 2: Develop, plan, and launch a comprehensive University fundraising campaign

- ❖ Establish fundraising targets and campaign themes that support the University Strategic Plan
- ❖ Collaborate on the identification and engagement of current and potential campaign major donors
- ❖ Participate in and actively promote events and activities that recognize involvement and appreciation of donors

Goal 3: Increase value of the Philanthropic Foundation portfolio

- ❖ Maintain or exceed the defined benchmark investment return, preserving fund values while increasing annual distributions
- ❖ Promote the full breadth of philanthropic options (estate plan, annual gift, endowment, scholarships, etc.)
- ❖ Increase the diversity of the donor base and their investments

Steward

Goal 1: Promote the Philanthropic Foundation as investment of choice

- ❖ Focus on outcomes where philanthropy is crucial to the success of the University's Strategic Plan
- ❖ Emphasize altruistic reasons to invest in higher education that prepares a diverse future workforce equipped with the polytechnic experience to address society's challenges and opportunities

Goal 2: Manage financial investments with transparency and integrity

- ❖ Make specific and targeted investments to support and advance key University priorities
- ❖ Provide effective philanthropic and endowment management and audit, ensuring transparency and integrity

Goal 3: Maintain board of directors at full capacity of membership

- ❖ Fill all open positions of the board with highly qualified and engaged directors
- ❖ Continuously improve the effectiveness, efficiency, and impact of the Board to affect active participation and achievement of goals
- ❖ Ensure the Board membership is reflective of the diversity of our students and alumni, and representative of the colleges, industries, and communities we serve





CalPolyPomona

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California State Polytechnic University, Pomona

3801 West Temple Avenue, Pomona, CA 91768

<https://www.cpp.edu/philanthropy>