

AGENDA

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Meeting: 1:45 p.m., Tuesday, January 31, 2006
Glenn S. Dumke Auditorium

Carol R. Chandler, Chair
Melinda Guzman Moore, Vice Chair
Roberta Achtenberg
Jeffrey L. Bleich
Debra S. Farar
Raymond W. Holdsworth
A. Robert Linscheid
Craig R. Smith
Kyriakos Tsakopoulos

Consent Item

Approval of Meeting Minutes of November 8, 2005

Discussion Items

1. Naming of an Academic Entity – California State University, Channel Islands, *Action*
2. Approval of the 2004-2005 Annual Report on External Support, *Action*
3. Council for Advancement and Support of Education Awards, *Information*

**MINUTES OF MEETING OF
COMMITTEE ON INSTITUTIONAL ADVANCEMENT**

**Trustees of The California State University
Office of the Chancellor
Glenn S. Dumke Conference Center
401 Golden Shore
Long Beach, California**

November 8, 2005

Members Present

Carol R. Chandler, Chair
Melinda Guzman Moore, Vice Chair
Roberta Achtenberg
Debra S. Farar
Murray L. Galinson, Chair of the Board
Raymond W. Holdsworth
A. Robert Linscheid
Charles B. Reed, Chancellor
Craig R. Smith

Trustee Chandler called the meeting to order.

The minutes of September 20, 2005, were approved as submitted.

Naming of a Facility, San Diego State University

Trustee Chandler asked Richard West, Executive Vice Chancellor and Chief Financial Officer to present the request to name Centennial Hall at San Diego State University as Manchester Hall.

Mr. West stated that the naming recognizes the generosity of alumni Douglas F. and Elizabeth C. Manchester. The Manchesters have contributed \$5 million to support campus priorities, the golf program, and undergraduate faculty support. Mr. West asked President Stephen Weber for comments on the naming request.

President Weber began by thanking the Manchester family for their extraordinary gift in support of the university. The Manchesters were described as community leaders that have been involved with their alma mater for decades.

The committee unanimously recommended adoption of the resolution (RIA 11-05-14).

Naming of an Academic Program, San Diego State University

Trustee Chandler asked Richard West, Executive Vice Chancellor and Chief Financial Officer to present the request to name the QUALCOMM Institute for Innovation and Educational Success at San Diego State University.

Mr. West stated that the naming recognizes the \$14.5 million contribution by QUALCOMM Incorporated, which represents the largest corporate gift in San Diego State University's history. Mr. West asked President Stephen Weber for comments on the naming request.

President Weber informed the committee that the mission of QUALCOMM's philanthropic endeavors is to address major issues critical to the long-term prosperity of the San Diego region. The Institute will support the professional development of teachers, curriculum improvement and institutional transformation in schools throughout the region.

The committee unanimously recommended adoption of the resolution (RIA 11-05-15).

Trustee Chandler adjourned the meeting.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Naming of an Academic Entity – California State University, Channel Islands

Presentation by:

Richard P. West
Executive Vice Chancellor and
Chief Financial Officer

Summary

This item will consider naming the School of Business and Economics at California State University, Channel Islands as the Martin V. Smith School of Business and Economics.

This proposal submitted by California State University, Channel Islands, and meets the criteria and other conditions specified in the Board of Trustees Policy on Naming California State University Academic Entities including approval by the system review panel and the campus academic senate.

Background

The Smith Family has generously committed \$8,000,000 in support of the School of Business. The naming is in memory of Martin V. Smith who was a leading real estate investor and developer in Ventura County. He was best known for helping to develop the Channel Islands Harbor, the Oxnard Financial Plaza, and a host of other significant landmarks. His four daughters carry forward his philanthropic tradition and have been active supporters of the university.

This naming request is made in lieu of RIA 05-03-00 which named the Martin V. Smith Building for Business Studies.

The following resolution is recommended for approval:

RESOLVED, By the Board of Trustees of the California State University that the School of Business at California State University, Channel Islands, be named Martin V. Smith School of Business and Economics and that RIA 05-03-00 be rescinded.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Approval of the 2004-2005 Annual Report on External Support

Presentation By

Richard P. West
Executive Vice Chancellor and
Chief Financial Officer

Lori A. Redfearn
Senior Director
Systemwide Advancement

Summary

This item presents information on external support received by the 23-campus California State University system from July 1, 2004 to June 30, 2005. Section 89720 of the Education Code requires that an annual gift report be submitted to the California Postsecondary Education Commission, the Joint Legislative Budget Committee, and the Department of Finance.

The report data is attached in Charts I through VIII. As is customary, the *2004-2005 Annual Report on External Support to the California State University* will be distributed at the Board meeting. This document will provide a summary and graphic illustration of the data. Following presentation of this report, campus highlights will be available for viewing on the system website at www.calstate.edu/ua/0405ExternalReport.

Overview

The California State University continues to enhance the teaching and learning experience through the generosity of private donors. Donors committed over \$285 million in new gifts, new pledges and testamentary provisions in fiscal year 2004-2004 to expand the margin of excellence that is achieved beyond the state's investment. These gift commitments represent the work accomplished within the fiscal year by Presidents and their staff in attracting a pipeline of support for the university. Giving remained constant compared to \$284 million raised the prior year. 2004-2005 was a difficult budget year for the university thus impacting the investment in advancement programs and the ability to grow.

Charitable gift receipts, a combination of new gift receivables and pledge payments, totaled nearly \$224 million. Gift receipts represent the ongoing work of advancement programs that

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result in cash and in-kind gifts received during the fiscal year. Charitable gift receipts were slightly down compared to \$227 million received in 2003-2004.

Recognizing the needs of a growing student population, alumni and friends provided over \$30 million for student scholarships and invested over \$37 million to build technologically advanced libraries, laboratories and classrooms. Additionally, academic programs and faculty support garnered \$62 million in contributions.

Looking to the future viability of the CSU, donors added over \$42 million to university endowments creating a lasting legacy of support. Of all charitable gifts received, 97 percent were designated to specific interests identified by the donor.

In addition to charitable support, the university received over \$1 billion in operating grants and contracts revenue. Contracts and grants revenue remained constant compared to 2003-2004. Of the nearly \$688 million received from federal grants, over 80 percent was dedicated to student financial assistance in the form of Pell, Supplemental Educational Opportunity Grants and Work Study grants. This support helps the university open access to a broad student population.

AttachmentsChart I: Philanthropic Productivity Three-Year History and Average

The data represents performance in developing philanthropic support for the institution over the last three years. Gift commitments include new gifts, new pledges and testamentary commitments representing a pipeline of support to the institution. Gift receipts include assets received by the university in the form of new gifts and pledge payments.

Chart II: Grants and Contracts, Noncapital 2004-2005 Fiscal Year

This data, reported from the audited financial statements, represents operating support to the institution derived from governmental grants and commercial contracts. These numbers do not include state general fund support.

Chart III: Gift Commitments Fiscal Year 2004-2005, Campus Detail

In this chart, each campus is grouped relative to the maturity of its advancement program based on the success indicators of the number of full time professional fundraisers, the market value of endowment and the number of donors. Campuses in Group I are developing advancement infrastructures, Group II are considered emerging advancement programs and Group III are maturing programs. Group I institutions are striving toward raising 10 percent of the annual state general fund allocation, Group II institutions are anticipated to raise somewhere between 10 percent and 15 percent, and the Group III benchmark is 15 percent or more.

Chart IV: Charitable Gift Receipts by Source

Campus specific data that identifies the source of charitable gift receipts: alumni, parents, other individuals, foundations, corporations and other organizations.

Chart V: Charitable Gift Receipts by Purpose

The chart includes campus specific data that identifies the purpose for which donors designated support.

Chart VI: Charitable Gift Receipts, Three-Year Historical

The chart provides a three-year history of systemwide results by both the gift source and the gift purpose.

Chart VII: Endowment Market Values, Three-Year Historical

This chart tracks a three-year history of endowment market values and compares the difference in values between 2003-2004 and 2004-2005 years. The year-end market value includes factors such as growth from new gifts, reductions due to expenditures and withdrawals, as well as changes due to investment returns. The total investment return rate for 2004-2005 is indicated separately.

Chart VIII: Alumni Data

Provides a campus-by-campus breakdown of alumni information including number of addressable alumni, alumni association membership, alumni solicited, alumni donors and alumni gifts. Alumni association members may include friends of the university that are not officially alumni. Therefore, it is possible for contributions from alumni association members to exceed gifts from alumni.

The following resolution is recommended for approval:

RESOLVED, By the Board of Trustees of the California State University, that the Board adopts the *2004-2005 Annual Report of External Support to the California State University* for submission to the California Postsecondary Education Commission, the California Joint Legislative Budget Committee, and the California Department of Finance.

Philanthropic Productivity
 Three Year History and Average
 Chart I

Campus	2002-2003	2003-2004	2004-2005	Three Year Average
	Total Gift Commitments	Total Gift Commitments	Total Gift Commitments	
Bakersfield	\$ 2,003,596	\$ 1,292,853	\$ 5,623,030	\$ 2,973,160
Channel Islands	\$ 3,783,376	\$ 1,707,600	\$ 1,801,902	\$ 2,430,959
Chico	\$ 7,352,081	\$ 6,564,394	\$ 3,940,081	\$ 5,952,185
Dominguez Hills	\$ 10,071,279	\$ 2,531,837	\$ 2,511,648	\$ 5,038,255
East Bay	\$ 1,892,967	\$ 2,732,191	\$ 10,755,572	\$ 5,126,910
Fresno	\$ 18,675,542	\$ 17,620,986	\$ 13,152,200	\$ 16,482,909
Fullerton	\$ 5,092,546	\$ 9,371,534	\$ 9,218,195	\$ 7,894,092
Humboldt	\$ 10,175,673	\$ 5,558,768	\$ 4,540,249	\$ 6,758,230
Long Beach	\$ 30,810,014	\$ 33,095,242	\$ 25,028,235	\$ 29,644,497
Los Angeles	\$ 4,588,476	\$ 6,110,060	\$ 3,931,222	\$ 4,876,586
Maritime Academy	\$ 1,122,941	\$ 1,902,184	\$ 485,378	\$ 1,170,168
Monterey Bay	\$ 2,364,394	\$ 7,812,541	\$ 2,989,430	\$ 4,388,788
Northridge	\$ 24,853,073	\$ 25,804,322	\$ 16,109,656	\$ 22,255,684
Pomona	\$ 13,028,915	\$ 5,060,541	\$ 9,689,766	\$ 9,259,741
Sacramento	\$ 14,736,292	\$ 7,699,000	\$ 7,288,263	\$ 9,907,852
San Bernardino	\$ 5,346,926	\$ 3,962,248	\$ 4,808,970	\$ 4,706,048
San Diego	\$ 60,947,884	\$ 63,353,269	\$ 57,402,705	\$ 60,567,953
San Francisco	\$ 12,618,765	\$ 17,295,739	\$ 20,222,125	\$ 16,712,210
San Jose	\$ 12,304,605	\$ 11,773,646	\$ 25,200,599	\$ 16,426,283
San Luis Obispo	\$ 37,460,957	\$ 32,530,047	\$ 38,924,924	\$ 36,305,309
San Marcos	\$ 4,724,800	\$ 2,258,325	\$ 6,816,078	\$ 4,599,734
Sonoma	\$ 13,888,084	\$ 13,319,131	\$ 10,592,715	\$ 12,599,977
Stanislaus	\$ 3,305,856	\$ 1,950,791	\$ 2,472,859	\$ 2,576,502
Chancellor's Office	\$ 1,002,129	\$ 2,301,242	\$ 1,637,220	\$ 1,646,864
TOTAL	\$302,151,171	\$283,608,491	\$285,143,022	\$290,300,895

Campus	2002-2003	2003-2004	2004-2005	Three Year Average
	Total Gift Receipts	Total Gift Receipts	Total Gift Receipts	
Bakersfield	\$ 1,747,994	\$ 1,442,804	\$ 2,209,129	\$ 1,799,976
Channel Islands	\$ 3,783,376	\$ 1,484,633	\$ 1,961,572	\$ 2,409,860
Chico	\$ 6,924,531	\$ 5,791,283	\$ 3,937,671	\$ 5,551,162
Dominguez Hills	\$ 9,776,654	\$ 2,501,828	\$ 2,447,721	\$ 4,908,734
East Bay	\$ 1,317,341	\$ 1,838,853	\$ 4,760,454	\$ 2,638,883
Fresno	\$ 22,426,465	\$ 14,341,686	\$ 15,621,000	\$ 17,463,050
Fullerton	\$ 4,925,196	\$ 6,359,362	\$ 7,514,544	\$ 6,266,367
Humboldt	\$ 2,016,858	\$ 8,141,778	\$ 4,343,720	\$ 4,834,119
Long Beach	\$ 25,526,889	\$ 21,190,992	\$ 18,169,097	\$ 21,628,993
Los Angeles	\$ 4,746,509	\$ 5,485,426	\$ 4,469,548	\$ 4,900,494
Maritime Academy	\$ 1,124,531	\$ 1,890,021	\$ 495,478	\$ 1,170,010
Monterey Bay	\$ 2,591,648	\$ 2,113,734	\$ 6,312,822	\$ 3,672,735
Northridge	\$ 18,849,318	\$ 28,822,284	\$ 15,338,959	\$ 21,003,520
Pomona	\$ 12,928,743	\$ 5,206,638	\$ 7,917,392	\$ 8,684,258
Sacramento	\$ 12,587,492	\$ 6,818,200	\$ 6,480,763	\$ 8,628,818
San Bernardino	\$ 5,420,830	\$ 3,160,626	\$ 2,669,884	\$ 3,750,447
San Diego	\$ 43,372,743	\$ 50,024,618	\$ 49,156,832	\$ 47,518,064
San Francisco	\$ 10,497,178	\$ 7,420,881	\$ 13,974,880	\$ 10,630,980
San Jose	\$ 10,855,527	\$ 11,680,810	\$ 10,438,099	\$ 10,991,479
San Luis Obispo	\$ 21,052,479	\$ 28,151,469	\$ 24,696,440	\$ 24,633,463
San Marcos	\$ 3,516,710	\$ 2,279,351	\$ 1,723,107	\$ 2,506,389
Sonoma	\$ 6,127,358	\$ 5,947,910	\$ 16,085,357	\$ 9,386,875
Stanislaus	\$ 4,714,805	\$ 2,983,798	\$ 2,392,601	\$ 3,363,735
Chancellor's Office	\$ 1,002,129	\$ 2,301,242	\$ 637,220	\$ 1,313,530
TOTAL	\$237,833,304	\$227,380,227	\$223,754,290	\$ 229,655,940

Gift commitments include new gifts, new pledges and testamentary commitments. Gift receipts reflects assets received by the university in the form of new gifts and pledge payments.

Grants and Contracts Revenue, Noncapital
 2004-2005 Fiscal Year
 Chart II

Campus	Federal	State and Local	Non Governmental	Total Grants and Contract Revenue
Bakersfield	\$ 14,886,469	\$ 5,967,061	\$ 2,433,292	\$ 23,286,822
Channel Islands	\$ 1,676,473	\$ 2,296,325	\$ -	\$ 3,972,798
Chico	\$ 29,605,130	\$ 10,613,101	\$ 5,608,306	\$ 45,826,537
Dominguez Hills	\$ 19,716,082	\$ 10,086,147	\$ 1,086,202	\$ 30,888,431
East Bay	\$ 17,194,373	\$ 3,343,417	\$ 1,473,733	\$ 22,011,523
Fresno	\$ 38,555,495	\$ 20,874,724	\$ 4,105,587	\$ 63,535,806
Fullerton	\$ 29,531,526	\$ 16,523,686	\$ 2,212,337	\$ 48,267,549
Humboldt	\$ 13,576,403	\$ 5,820,819	\$ 2,039,597	\$ 21,436,819
Long Beach	\$ 48,933,641	\$ 16,935,619	\$ 4,109,029	\$ 69,978,289
Los Angeles	\$ 47,453,029	\$ 13,076,405	\$ 772,146	\$ 61,301,580
Maritime Academy	\$ 529,691	\$ 413,371	\$ 208,723	\$ 1,151,785
Monterey Bay	\$ 15,331,631	\$ 5,134,251	\$ 783,628	\$ 21,249,510
Northridge	\$ 52,222,922	\$ 20,759,978	\$ 5,312,358	\$ 78,295,258
Pomona	\$ 27,006,357	\$ 11,622,995	\$ 4,758,380	\$ 43,387,732
Sacramento	\$ 22,830,126	\$ 13,139,375	\$ 362,793	\$ 36,332,294
San Bernardino	\$ 25,947,257	\$ 13,652,220	\$ 6,844,927	\$ 46,444,404
San Diego	\$ 105,611,105	\$ 27,498,753	\$ 24,758,443	\$ 157,868,301
San Francisco	\$ 66,881,275	\$ 19,140,784	\$ 5,368,531	\$ 91,390,590
San Jose	\$ 45,303,967	\$ 19,642,626	\$ 5,332,111	\$ 70,278,704
San Luis Obispo	\$ 18,238,528	\$ 10,571,060	\$ 2,725,165	\$ 31,534,753
San Marcos	\$ 10,651,691	\$ 2,702,779	\$ 309,952	\$ 13,664,422
Sonoma	\$ 23,481,755	\$ 13,306,981	\$ 2,628,689	\$ 39,417,425
Stanislaus	\$ 12,375,806	\$ 4,770,057	\$ 214,590	\$ 17,360,453
Chancellor's Office	\$ -	\$ -	\$ -	\$ -
TOTALS:	\$ 687,540,732	\$ 267,892,534	\$ 83,448,519	\$ 1,038,881,785

Gift Commitments
 Fiscal Year 2004-2005 Campus Detail
 Chart III

	Campus	New Charitable Gifts	Indian and Local Government Contributions	New Pledges	Testamentary Commitments	Total Gift Commitments
<i>Group I</i>	Bakersfield	\$ 1,997,292	\$ -	\$ 225,738	\$ 3,400,000	\$ 5,623,030
	Channel Islands	\$ 1,742,366	\$ -	\$ 59,536	\$ -	\$ 1,801,902
	Dominguez Hills	\$ 1,397,683	\$ -	\$ 1,113,965	\$ -	\$ 2,511,648
	East Bay	\$ 2,966,470	\$ -	\$ 5,239,102	\$ 2,550,000	\$ 10,755,572
	Humboldt	\$ 3,916,898	\$ 4,690	\$ 623,351	\$ -	\$ 4,540,249
	Maritime Academy	\$ 472,878	\$ -	\$ 12,500	\$ -	\$ 485,378
	Monterey Bay	\$ 2,769,233	\$ -	\$ 220,197	\$ -	\$ 2,989,430
	San Bernardino	\$ 2,231,827	\$ 1,303,247	\$ 1,273,896	\$ -	\$ 4,808,970
	Stanislaus	\$ 2,392,601	\$ -	\$ 80,258	\$ -	\$ 2,472,859

<i>Group II</i>	Chico	\$ 3,937,671	\$ 2,410	\$ -	\$ -	\$ 3,940,081
	Fullerton	\$ 6,421,409	\$ -	\$ 2,796,786	\$ -	\$ 9,218,195
	Los Angeles	\$ 3,098,043	\$ -	\$ 733,179	\$ 100,000	\$ 3,931,222
	Northridge	\$ 12,609,382	\$ -	\$ 3,450,274	\$ 50,000	\$ 16,109,656
	Pomona	\$ 7,917,403	\$ -	\$ 361,363	\$ 1,411,000	\$ 9,689,766
	Sacramento	\$ 6,480,763	\$ -	\$ 707,500	\$ 100,000	\$ 7,288,263
	San Francisco	\$ 11,459,001	\$ -	\$ 8,763,124	\$ -	\$ 20,222,125
	San Jose	\$ 10,438,099	\$ -	\$ 5,612,500	\$ 9,150,000	\$ 25,200,599
	San Marcos	\$ 1,098,678	\$ -	\$ 5,717,400	\$ -	\$ 6,816,078
	Sonoma	\$ 5,052,752	\$ 1,025,000	\$ 1,285,068	\$ 3,229,895	\$ 10,592,715

<i>Group III</i>	Fresno	\$ 13,151,900	\$ 300	\$ -	\$ -	\$ 13,152,200
	Long Beach	\$ 17,503,472	\$ -	\$ 2,445,000	\$ 5,079,763	\$ 25,028,235
	San Diego	\$ 39,742,688	\$ 121,850	\$ 12,748,167	\$ 4,790,000	\$ 57,402,705
	San Luis Obispo	\$ 14,499,107	\$ -	\$ 11,404,954	\$ 13,020,863	\$ 38,924,924

Chancellor's Office	\$ 637,220	\$ -	\$ -	\$ 1,000,000	\$ 1,637,220
TOTAL	\$ 173,934,836	\$ 2,457,497	\$ 64,873,858	\$ 43,881,521	\$ 285,143,022

2004-2005 General Fund	Gift Commitments as a Percent of the General Fund
\$ 51,035,500	11%
\$ 27,288,800	7%
\$ 62,098,700	4%
\$ 75,988,500	14%
\$ 63,111,006	7%
\$ 13,513,900	4%
\$ 43,933,700	7%
\$ 84,281,900	6%
\$ 50,341,300	5%
Group I Average	7%

\$ 100,091,800	4%
\$ 140,743,400	7%
\$ 109,090,700	4%
\$ 155,968,500	10%
\$ 120,544,300	8%
\$ 137,791,500	5%
\$ 133,046,400	15%
\$ 141,297,000	18%
\$ 50,618,800	13%
\$ 50,478,074	21%
Group II Average	11%

\$ 125,375,100	10%
\$ 165,823,900	15%
\$ 178,713,300	32%
\$ 120,737,300	32%
Group III Average	22%

Systemwide Average	11%
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Charitable Gift Receipts by Source
 Fiscal Year 2004-2005
 Chart IV

Campus	Individuals			Organizations			Gift Receipts Total	Total Number Individual Donors
	Alumni	Parents	Other	Foundations	Corporations	Other Organizations		
Bakersfield	\$ 135,966	\$ 24,589	\$ 558,061	\$ 276,657	\$ 1,205,507	\$ 8,349	\$ 2,209,129	2,373
Channel Islands	\$ 2,420	\$ 1,067	\$ 1,442,735	\$ 102,000	\$ 313,683	\$ 99,667	\$ 1,961,572	498
Chico	\$ 1,060,310	\$ 298,649	\$ 1,005,585	\$ 158,805	\$ 1,269,323	\$ 144,999	\$ 3,937,671	15,023
Dominguez Hills	\$ 45,138	\$ 258	\$ 1,137,221	\$ 126,925	\$ 1,075,102	\$ 63,077	\$ 2,447,721	385
East Bay	\$ 402,609	\$ 1,651	\$ 304,118	\$ 2,567,982	\$ 1,428,382	\$ 55,712	\$ 4,760,454	1,830
Fresno	\$ 4,190,600	\$ 21,400	\$ 4,939,800	\$ 1,770,100	\$ 3,557,300	\$ 1,141,800	\$ 15,621,000	7,703
Fullerton	\$ 2,674,384	\$ 71,793	\$ 1,887,369	\$ 884,599	\$ 1,691,153	\$ 305,246	\$ 7,514,544	7,360
Humboldt	\$ 256,778	\$ 156,370	\$ 2,769,284	\$ 151,399	\$ 257,040	\$ 752,849	\$ 4,343,720	4,353
Long Beach	\$ 4,417,809	\$ 309,983	\$ 4,605,122	\$ 2,849,534	\$ 5,354,487	\$ 632,162	\$ 18,169,097	17,988
Los Angeles	\$ 364,860	\$ 2,723	\$ 380,925	\$ 1,737,509	\$ 1,323,583	\$ 659,948	\$ 4,469,548	4,856
Maritime Academy	\$ 106,250	\$ 28,633	\$ 155,217	\$ 14,750	\$ 128,270	\$ 62,358	\$ 495,478	669
Monterey Bay	\$ 5,355	\$ 16,973	\$ 3,322,310	\$ 501,191	\$ 2,324,134	\$ 142,859	\$ 6,312,822	3,818
Northridge	\$ 1,433,016	\$ 104,134	\$ 1,031,498	\$ 10,310,516	\$ 2,185,430	\$ 274,365	\$ 15,338,959	8,697
Pomona	\$ 2,209,063	\$ 80,120	\$ 3,098,337	\$ 583,325	\$ 1,408,035	\$ 538,512	\$ 7,917,392	7,674
Sacramento	\$ 456,640	\$ 9,320	\$ 4,353,268	\$ 421,381	\$ 953,240	\$ 286,914	\$ 6,480,763	27,785
San Bernardino	\$ 181,255	\$ 21,723	\$ 1,167,594	\$ 595,324	\$ 665,671	\$ 38,317	\$ 2,669,884	2,469
San Diego	\$ 4,690,886	\$ 256,439	\$12,103,077	\$ 11,363,696	\$ 14,340,230	\$ 6,402,504	\$ 49,156,832	64,824
San Francisco	\$ 3,563,561	\$ 320	\$ 1,189,522	\$ 7,519,333	\$ 1,303,542	\$ 398,602	\$ 13,974,880	2,148
San Jose	\$ 1,768,860	\$ 73,664	\$ 1,266,180	\$ 3,951,762	\$ 3,228,679	\$ 148,954	\$ 10,438,099	6,706
San Luis Obispo	\$ 9,210,874	\$ 953,369	\$ 3,605,592	\$ 2,206,882	\$ 8,257,143	\$ 462,580	\$ 24,696,440	17,989
San Marcos	\$ 46,198	\$ 1,250	\$ 378,213	\$ 457,910	\$ 816,245	\$ 23,291	\$ 1,723,107	582
Sonoma	\$ 173,978	\$ 2,393	\$12,308,250	\$ 2,027,414	\$ 889,024	\$ 684,298	\$ 16,085,357	2,746
Stanislaus	\$ 100,343	\$ 2,270	\$ 692,231	\$ 498,843	\$ 950,119	\$ 148,795	\$ 2,392,601	2,003
Chancellor's Office	\$ -	\$ -	\$ 251,990	\$ 51,500	\$ 333,500	\$ 230	\$ 637,220	9
TOTAL	\$37,497,153	\$ 2,439,091	\$63,953,499	\$ 51,129,337	\$ 55,258,822	\$ 13,476,388	\$ 223,754,290	210,488

Number of Individual Donors includes alumni, parents, faculty, staff and friends of the university. The number does not include foundations, corporations and other organizations.

Charitable Gift Receipts by Purpose
 Fiscal Year 2004-2005
 Chart V

Campus	Current Operations		Capital Purposes				Deferred Gifts	Gift Receipts Total
	Unrestricted	Restricted	Campus Improvements Property, Buildings and Equipment	Endowment		Loan Funds		
				Unrestricted	Restricted			
Bakersfield	\$ 145,190	\$ 1,610,973	\$ 178,991	\$ 1,000	\$ 272,975	\$ -	\$ -	2,209,129
Channel Islands	\$ 408,655	\$ 636,014	\$ 741,890	\$ 600	\$ 174,413	\$ -	\$ -	1,961,572
Chico	\$ 264,457	\$ 1,582,696	\$ -	\$ 5,664	\$ 2,083,769	\$ 1,085	\$ -	3,937,671
Dominguez Hills	\$ 259,836	\$ 1,110,156	\$ 1,065,229	\$ -	\$ 12,500	\$ -	\$ -	2,447,721
East Bay	\$ 102,013	\$ 2,243,764	\$ 2,367,750	\$ -	\$ 46,927	\$ -	\$ -	4,760,454
Fresno	\$ 117,300	\$ 9,275,400	\$ 1,497,200	\$ -	\$ 3,706,100	\$ -	\$ 1,025,000	15,621,000
Fullerton	\$ 250,307	\$ 4,226,613	\$ 1,883,516	\$ -	\$ 992,370	\$ -	\$ 161,738	7,514,544
Humboldt	\$ 124,483	\$ 2,983,102	\$ 50	\$ 10,000	\$ 1,225,540	\$ 545	\$ -	4,343,720
Long Beach	\$ 1,120,574	\$ 10,839,252	\$ 1,822,782	\$ -	\$ 1,196,693	\$ -	\$ 3,189,796	18,169,097
Los Angeles	\$ 313,596	\$ 3,587,689	\$ 219,800	\$ -	\$ 348,463	\$ -		4,469,548
Maritime Academy	\$ 177,266	\$ 274,257	\$ 22,000	\$ -	\$ 21,955	\$ -		495,478
Monterey Bay	\$ 40,238	\$ 1,328,537	\$ 3,972,458	\$ -	\$ 971,589	\$ -		6,312,822
Northridge	\$ 169,449	\$ 5,361,417	\$ 679,679	\$ -	\$ 9,128,414	\$ -		15,338,959
Pomona	\$ 371,452	\$ 3,599,284	\$ 1,293,220	\$ 300	\$ 2,653,136	\$ -	\$ -	7,917,392
Sacramento	\$ 130,890	\$ 4,918,934	\$ 276,684	\$ 2,000	\$ 1,097,255	\$ -	\$ 55,000	6,480,763
San Bernardino	\$ 22,272	\$ 1,668,864	\$ 452,851	\$ -	\$ 515,096	\$ 10,801	\$ -	2,669,884
San Diego	\$ 55,850	\$ 42,571,727	\$ 139,611	\$ -	\$ 3,990,329	\$ -	\$ 2,399,315	49,156,832
San Francisco	\$ 88,512	\$ 6,341,499	\$ 304,130	\$ -	\$ 6,533,239	\$ -	\$ 707,500	13,974,880
San Jose	\$ 360,575	\$ 7,439,698	\$ 1,000,100	\$ 311,090	\$ 10,031	\$ 1,216,605	\$ 100,000	10,438,099
San Luis Obispo	\$ 690,931	\$ 8,138,188	\$ 10,825,092	\$ -	\$ 4,821,918	\$ 275	\$ 220,036	24,696,440
San Marcos	\$ 117,445	\$ 1,546,354	\$ 2,686	\$ -	\$ 56,622	\$ -	\$ -	1,723,107
Sonoma	\$ 20,902	\$ 5,212,391	\$ 8,990,472	\$ -	\$ 1,786,592	\$ -	\$ 75,000	16,085,357
Stanislaus	\$ 111,068	\$ 1,927,192	\$ 111,064	\$ -	\$ 243,277	\$ -	\$ -	2,392,601
Chancellor's Office	\$ 169,618	\$ 467,602	\$ -	\$ -	\$ -	\$ -	\$ -	637,220
TOTAL	\$ 5,632,879	\$ 128,891,603	\$ 37,847,255	\$ 330,654	\$ 41,889,203	\$ 1,229,311	\$ 7,933,385	\$223,754,290

Charitable Gift Receipts
 Three Year History, System Detail
 Chart VI

<i>Category</i>	<i>2002-2003</i>	<i>2003-2004</i>	<i>2004-2005</i>
Source of Support			
Individuals			
Alumni	\$ 21,156,871	\$ 20,547,225	\$ 37,497,153
Parents	\$ 2,213,693	\$ 2,496,610	\$ 2,439,091
Others	\$ 67,743,053	\$ 85,283,485	\$ 63,953,499
Individuals Total	\$ 91,113,617	\$ 108,327,320	\$ 103,889,743
Organizations			
Foundations	\$ 39,886,503	\$ 33,373,989	\$ 51,129,337
Corporations	\$ 82,286,297	\$ 72,345,302	\$ 55,258,822
Others	\$ 24,546,887	\$ 13,333,616	\$ 13,476,388
Organizations Total	\$ 146,719,687	\$ 119,052,907	\$ 119,864,547
Source of Support Total	\$ 237,833,304	\$ 227,380,227	\$ 223,754,290

Gift Purposes			
Current Operations			
Unrestricted	\$ 7,784,515	\$ 7,382,730	\$ 5,632,879
Restricted	\$ 146,658,728	\$ 127,005,016	\$ 128,891,603
Current Operations Total	\$ 154,443,243	\$ 134,387,746	\$ 134,524,482
Capital Purposes			
Property, Buildings and Equipment	\$ 36,619,696	\$ 51,280,470	\$ 37,847,255
Endowment: Unrestricted	\$ 837,709	\$ 105,485	\$ 330,654
Endowment: Restricted	\$ 28,990,326	\$ 38,883,548	\$ 41,889,203
Loan Funds	\$ 13,651	\$ 3,241	\$ 1,229,311
Capital Purposes Total	\$ 66,461,382	\$ 90,272,744	\$ 81,296,423
Deferred Gifts	\$ 16,928,679	\$ 2,719,737	\$ 7,933,385
Gift Purposes Total	\$ 237,833,304	\$ 227,380,227	\$ 223,754,290

Endowment
Three Year Market Value
Chart VII

Campus	2002-2003 Market Value	2003-2004 Market Value	2004-2005 Market Value	2003-2004 to 2004-2005 Comparison		2004-2005 Total Investment Return Rate
				Amount	Percentage	
Bakersfield	\$ 5,341,499	\$ 6,659,314	\$ 7,293,000	\$ 633,686	9.52%	8.25%
Channel Islands	\$ 6,278,709	\$ 7,251,685	\$ 7,648,602	\$ 396,917	5.47%	7.40%
Chico	\$ 21,933,125	\$ 27,399,394	\$ 29,579,432	\$ 2,180,038	7.96%	8.76%
Dominguez Hills	\$ 3,192,337	\$ 4,372,964	\$ 5,060,371	\$ 687,407	15.72%	10.00%
East Bay	\$ 4,122,370	\$ 5,443,216	\$ 5,658,617	\$ 215,401	3.96%	8.48%
Fresno	\$ 73,742,000	\$ 86,492,000	\$ 94,485,000	\$ 7,993,000	9.24%	5.00%
Fullerton	\$ 6,468,545	\$ 8,329,631	\$ 9,828,444	\$ 1,498,813	17.99%	6.07%
Humboldt	\$ 12,228,715	\$ 11,588,553	\$ 12,663,531	\$ 1,074,978	9.28%	3.65%
Long Beach	\$ 19,081,132	\$ 25,756,266	\$ 27,880,580	\$ 2,124,314	8.25%	7.82%
Los Angeles	\$ 9,287,787	\$ 10,089,180	\$ 10,836,406	\$ 747,226	7.41%	11.78%
Maritime Academy	\$ 1,523,404	\$ 1,475,449	\$ 1,594,189	\$ 118,740	8.05%	4.63%
Monterey Bay	\$ 1,204,263	\$ 1,490,346	\$ 3,240,222	\$ 1,749,876	117.41%	2.04%
Northridge	\$ 30,179,989	\$ 36,850,287	\$ 47,364,888	\$ 10,514,601	28.53%	8.10%
Pomona	\$ 17,241,435	\$ 20,516,786	\$ 23,606,561	\$ 3,089,775	15.06%	3.50%
Sacramento	\$ 12,693,475	\$ 13,775,830	\$ 15,525,000	\$ 1,749,170	12.70%	3.10%
San Bernardino	\$ 7,917,430	\$ 9,125,615	\$ 10,288,284	\$ 1,162,669	12.74%	6.23%
San Diego	\$ 76,678,958	\$ 94,517,802	\$ 99,628,917	\$ 5,111,115	5.41%	11.54%
San Francisco	\$ 21,911,909	\$ 22,529,725	\$ 31,340,913	\$ 8,811,188	39.11%	6.90%
San Jose	\$ 27,324,000	\$ 30,933,000	\$ 35,126,000	\$ 4,193,000	13.56%	12.00%
San Luis Obispo	\$ 102,054,526	\$ 123,954,441	\$ 148,861,122	\$ 24,906,681	20.09%	16.57%
San Marcos	\$ 7,319,000	\$ 7,954,000	\$ 8,195,000	\$ 241,000	3.03%	7.40%
Sonoma	\$ 21,270,000	\$ 25,270,646	\$ 27,516,572	\$ 2,245,926	8.89%	5.92%
Stanislaus	\$ 5,440,936	\$ 6,843,150	\$ 7,680,284	\$ 837,134	12.23%	7.87%
Chancellor's Office	\$ 5,650,123	\$ 6,945,516	\$ 7,222,790	\$ 277,274	3.99%	6.00%
TOTAL	\$ 500,085,667	\$ 595,564,796	\$ 678,124,725	\$ 82,559,929	13.86%	6.77%

Note 1: The year-end market value factors in growth from gifts, reductions due to expenditures and withdrawals, as well as investment returns.

Note 2: The increase in endowment market value for CSU Monterey Bay includes the realization of a \$677,806 bequest from 2002-2003.

Alumni Data
 2004-2005 Fiscal Year
 Chart VIII

Campus	Number of Addressable Alumni	Alumni Association Members		Total Number Members	Membership Dues Collected	Alumni Solicited	Alumni Donors	Total Alumni Contributions	Percentage of Alumni Contributions from Association Members	Total Contributions from Alumni Association Members
		Annual	Life-time							
Bakersfield	22,522	1,073	163	1,236	\$ 10,730	11,153	1,228	\$ 135,966	105%	\$ 142,491
Channel Islands	551	385	13	398	\$ 4,790	551	105	\$ 2,420	81%	\$ 1,965
Chico	116,133	3,116	401	3,517	\$ 122,119	116,133	6,100	\$ 1,060,310	90%	\$ 953,056
Dominguez Hills	61,466	225	478	703	\$ 10,440	10,000	189	\$ 45,138	18%	\$ 8,155
East Bay	87,590	835	1,881	2,716	\$ 36,533	51,607	1,322	\$ 402,609	14%	\$ 56,806
Fresno	141,647	4,415	1,848	6,263	\$ 188,048	44,834	3,665	\$ 4,190,600	44%	\$ 1,826,500
Fullerton	137,164	3,783	2,045	5,828	\$ 64,902	127,163	4,925	\$ 2,674,384	53%	\$ 1,404,980
Humboldt	43,592	814	2,706	3,520	\$ 256,778	36,154	1,892	\$ 256,778	14%	\$ 34,835
Long Beach	195,392	27,595	820	28,415	\$ 40,113	100,216	12,393	\$ 4,417,809	72%	\$ 3,172,656
Los Angeles	107,426	5,672	1,350	7,022	\$ 126,732	14,662	3,879	\$ 364,860	44%	\$ 161,797
Maritime Academy	3,543	393	232	625	\$ 22,710	3,212	358	\$ 106,250	52%	\$ 54,784
Monterey Bay	2,618	249	502	751	\$ 34,275	2,618	53	\$ 5,355	62%	\$ 3,294
Northridge	169,807	4,744	723	5,467	\$ 222,703	145,000	3,010	\$ 1,433,016	20%	\$ 282,762
Pomona	95,241	1,255	2,099	3,354	\$ 56,110	28,053	5,634	\$ 2,209,063	71%	\$ 1,565,041
Sacramento	146,332	2,320	2,212	4,532	\$ 108,379	139,112	3,322	\$ 456,640	43%	\$ 197,791
San Bernardino	52,131	2,540	576	3,116	\$ 53,620	9,761	1,517	\$ 181,255	28%	\$ 50,104
San Diego	186,139	6,779	3,489	10,268	\$ 389,567	65,870	7,203	\$ 4,690,886	42%	\$ 1,974,912
San Francisco	220,290	2,333	1,578	3,911	\$ 55,450	44,160	1,031	\$ 3,563,561	30%	\$ 1,076,054
San Jose	147,398	5,361	4,048	9,409	\$ 219,772	116,956	4,054	\$ 1,768,860	66%	\$ 1,160,060
San Luis Obispo	123,926	2,715	9,385	12,100	\$ 148,156	63,214	10,136	\$ 9,210,874	78%	\$ 7,229,062
San Marcos	15,216	640	3	643	\$ 18,878	12,044	265	\$ 46,198	71%	\$ 32,714
Sonoma	38,812	753	979	1,732	\$ 21,310	873	468	\$ 173,978	54%	\$ 94,640
Stanislaus	36,954	285	455	740	\$ 10,260	21,677	1,244	\$ 100,343	10%	\$ 10,260
TOTAL	2,151,890	78,280	37,986	116,266	\$ 2,222,375	1,165,023	73,993	\$ 37,497,153	57%	\$ 21,494,719

Alumni Association members may include friends of the university that are not officially alumni. Therefore, it is possible for contributions from Alumni Association members to exceed gifts from alumni.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Council for Advancement and Support of Education Awards

Presentation By

Richard West
Executive Vice Chancellor and
Chief Financial Officer

Summary

This information item acknowledges California State University recipients of the 2005 Council for Advancement and Support of Education (CASE) awards.

CSU Fullerton President Milton A. Gordon was honored with the CASE District VII Chief Executive Leadership Award. President Gordon was cited for his accomplishments in strengthening student recruitment and retention, overseeing an array of physical enhancements of the campus—including the opening of a new science laboratory, library expansion, and sports stadiums—forming new community partnerships, and attracting major new gifts to the university. Four of the previous eight recipients of this award have been CSU presidents, a tribute to the success of CSU advancement efforts.

Cal Poly Pomona's Associate Vice President for University Development Ronald R. Simons received the CASE District VII Tribute Award, established in 1985 to recognize members who have promoted the highest standards of professionalism in the advancement field.

Also recognized for their service to CASE were 20-year members Pamela Allen from Cal Poly Pomona, Colleen Bentley-Adler from the Chancellor's Office, Robert Bersi from CSU Long Beach, Donna Blakemore from San Francisco State University, David Disend from CSU Monterey Bay, and Milton Richards from CSU Stanislaus.

Background

2005 CASE Award Recipients

Each year, the CASE honors superior achievement in the field of university advancement. This year materials showcasing CSU campuses and programs were recognized by CASE for outstanding communications and best practices in advancement. The awards were given by CASE District VII, which encompasses Arizona, California, Hawaii, Nevada, and Utah. As in prior years, the CSU made an impressive showing, winning a fifth of all awards given.

Institutional Advancement
Agenda Item 3
January 31-February 1, 2006
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Chancellor's Office

Silver in Outstanding Communications: Web Sites (Home Pages/Special Pages)/CD Roms, *CSU Chancellor's Office Intranet*

Chico

Bronze in Best Practices in Alumni Relations, *Graduation T-Shirt Campaign*
Bronze in Outstanding Communications: Magazine Writing, *Chico Statements*

East Bay

Silver in Outstanding Communications: Internal Audience Newsletters/Tabloids, *The View*

Fullerton

Gold in Outstanding Communications: Student Recruitment Publications, *University Viewbook*

Gold in Outstanding Communications: Web Sites (Home Pages/Special Pages)/CD Roms, *TitanMag.com*

Long Beach

Gold in Outstanding Communications: E-mail Newsletters, *Inside CSULB E-Newsletter*

Northridge

Gold in Outstanding Communications: Print Advertisements, *HR Ad Series*

Bronze in Outstanding Communications: Student Recruitment Publications, *ELPS Brochure*

San Luis Obispo

Silver in Best Practices in Public Relations or Government Relations, *Mardi Gras: The Party's Over*

Bronze in Outstanding Communications: E-mail Newsletters, *Cal Poly Update*