

AGENDA

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Meeting: 4:30 p.m., Tuesday, March 11, 2008
Glenn S. Dumke Auditorium

Carol R. Chandler, Chair
Craig R. Smith, Vice Chair
Jeffrey L. Bleich
Debra S. Farar
Kenneth Fong
Melinda Guzman
A. Robert Linscheid
Peter G. Mehas
Glen O. Toney
Kyriakos Tsakopoulos

Consent Item

Approval of Meeting Minutes of January 22, 2008

Discussion Items

1. Naming of an Academic Entity—California State University, East Bay and California State University, San Bernardino, *Action*
2. Naming of a Facility – California State University, Fresno, *Action*
3. Naming of an Academic Entity – California State University, Long Beach, *Action*
4. Recognition for Support of San José State University, *Action*
5. Measuring Advancement, *Information*
6. Naming of a Facility – California State University, Los Angeles, *Action*

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

**Office of the Chancellor
Glenn S. Dumke Auditorium
401 Golden Shore
Long Beach, California**

January 22, 2008

Members Present

Carol R. Chandler, Chair
Craig R. Smith, Vice Chair
Roberta Achtenberg, Chair of the Board
Jeffrey L. Bleich
Debra S. Farar
Kenneth Fong
A. Robert Linscheid
Peter G. Mehas
Charles B. Reed, Chancellor
Glen O. Toney
Kyriakos Tsakopoulos

Approval of Minutes

The minutes of November 13, 2007 were approved.

Naming of an Academic Entity – California State University, Fullerton

Chair Chandler asked Executive Vice Chancellor and Chief Financial Officer, Richard West to present the request to name the College of Business and Economics at the California State University, Fullerton, as the Steven G. Mihaylo College of Business and Economics.

Mr. West stated that the naming recognizes Mr. Mihaylo's gift commitment of \$30 million, the largest gift in California State University, Fullerton's history. Mr. Mihaylo's previous gift of \$4.5 million in 2004-2005 was then the largest in the history of CSU Fullerton, and supported construction of a new, state-of-the-art building for the College of Business and Economics. Mr. Mihaylo's new gift will provide for endowed chairs, faculty support, program enhancement, and scholarships for future generations. Mr. West added that Mr. Mihaylo is an esteemed alumnus of the College of Business and Economics; he completed a Bachelor's Degree in accounting and finance in 1969.

President Gordon described Mr. Mihaylo as "a typical CSU student"; he worked his way through California State University, Fullerton after serving in the army. Mr. Mihaylo eventually started his own corporation, Inter-Tel, which became one of the most successful communication corporations in the United States. President Gordon commented on Mr. Mihaylo's character by explaining how he carefully crafted his \$30 million gift as a benefit to the entire university.

The committee recommended approval of the proposed resolution (RIA 01-08-01).

Chancellor Reed expressed his pleasure at the opportunity to recognize Mr. Mihaylo's generous support of the university and noted the transformative effect that his gift will have on the College of Business and Economics. He added that Mr. Mihaylo sets an example of what is expected from outstanding citizens of our state: to keep the California economy strong and to encourage their colleagues in giving something back to our society.

Mr. Mihaylo expressed his desire to set an example with his gift to CSU Fullerton, and by doing so, encourage others to give of themselves. He added that one of the greatest honors he can think of is to be a part of the University and work toward making Cal State Fullerton recognized for the great work they do. He expressed his continued commitment to CSU Fullerton's future development.

Chancellor Reed and Chair Achtenberg presented Mr. Mihaylo with a resolution certificate recognizing his gift to California State University, Fullerton.

Naming of an Academic Entity – San José State University

Chair Chandler asked Mr. West to present the request to name the College of Business Honors Program at San José State University as the Gary J. Sbona Honors Program.

Mr. West stated that the naming recognizes a \$5.2 million gift made by Mr. Sbona to support the current business honors program, which places the top 2% of juniors and seniors with leading Silicon Valley companies for real-world learning experiences. The gift will expand travel abroad opportunities and enhance the global reputation of the program. Mr. West added that Mr. Sbona serves as chairman and CEO of the Regent Pacific Management Corporation, a global firm that specializes in the restructuring of underperforming companies. He is a distinguished alumnus, a member of the college advisory board, and a member of the San José State University Tower Foundation Board.

President Kassing noted that Gary J. Sbona is an internationally recognized business leader. Mr. Sbona's gift will provide a very special learning opportunity for the university's best and brightest business students. President Kassing added that Mr. Sbona recognizes the importance of how his gift will enable the CSU to bridge the gap between academia and industry. Mr. Sbona's visionary gift will benefit the College of Business by helping it gain visibility for its students and programs and become a primary source for employee recruitment in Silicon Valley.

The committee recommended approval of the proposed resolution (RIA 01-08-02).

Chancellor Reed expressed his pleasure for the opportunity to recognize Mr. Sbona for his generous support for the College of Business Honors Program at San José State University. Chancellor Reed added that Mr. Sbona's gift will help establish "learning by doing" exercises that characterizes a CSU education.

Mr. Sbona expressed his gratitude for this honor. He was the first person in his family to receive a high school education, and turning his dreams into reality motivated him to give back to education.

Chancellor Reed and Chair Achtenberg presented Mr. Sbona with a resolution certificate recognizing his gift to San José State University.

2006-2007 Annual Report on External Support

Chair Chandler stated the 2006-2007 Annual Report on External Support is submitted to the California Postsecondary Education Commission, the California Joint Legislative Budget Committee, and the California Department of Finance as required by the Education Code. Chair Chandler called attention to a hard copy version of the report distributed earlier, and asked Mr. West to present the report.

Mr. West introduced the External Support Report by stating that external support makes college more affordable by providing students with additional financial aid, and enables the university to enhance teaching and learning within an environment of continuous change. He asked Ms. Lori Redfearn, Assistant Vice Chancellor of Advancement Services, to present the data.

Ms. Redfearn provided a comprehensive overview of the challenges, successes, and overall status of the university's external support activities during the 2006-2007 year. The CSU experienced its best year ever for external support, reaching over \$1.46 billion in 2006-07. This includes \$1.1 billion in operating grants and contracts, and \$326 million in gift commitments. This represents a \$77 million increase in support over the \$1.83 billion received in 2005-06.

Growth in grants and contracts accounted for \$36 million or 47% of the growth in external support for 2006-2007. Within the \$718 million of federal support, \$368 million was dedicated to student financial aid grants.

The CSU received \$326 million in new gift commitments this year; it is the first time that the CSU has broken the \$300 million mark in fundraising. Philanthropic support in 2006-2007 increased by \$40 million compared to the 2005-2006 numbers, a 14% gain.

Ms. Redfearn provided a breakout of gift commitments by campus group. All three campus groups experienced increases in real dollars, with Group II posting the largest increase at 25%. Fourteen out of the twenty-three campuses saw giving increases in 2006-2007.

The CSU system continues to strive to raise private gifts that are the equivalent of at least 10% of the university's state general fund allocation. In 2006-2007 gift commitments exceeded that goal, and equaled 12%. Regarding gifts by purpose, 97% of all charitable gifts were designated by donors to meet specific needs. Only 3% (\$6 million) of gifts received were unrestricted.

Gifts from foundations were up by \$12 million in 2006-2007, likely due to the strong financial market last year. Corporate giving increased by about \$1 million; CSU campuses receive an average of \$2.3 million dollars in corporate gifts, compared to the national average of \$1.4

million. Individual giving increased in terms of total dollars, although the CSU did experience a slight decrease in the number of donors.

The CSU endowment benefited from a strong financial market in the 2006-2007 year. Donor contributions were up \$7 million from the prior year, and the total endowment market value has reached \$874 million. Overall, endowment returns have improved with regard to peer benchmarks and over half of CSU campuses beating the market benchmark. There is still an opportunity to improve investment returns, particularly with endowments of \$25 million or less that have less diversified portfolios and are spending more on investment management fees. Citi Smith Barney is offering a program where all participants in the investment management contract will benefit from reduced fees based on total assets under management, while still having the ability to customize local portfolios.

The 2006-2007 Annual Report on External Support is published electronically on the web; the web report includes highlights of the accomplishments of campuses.

The committee recommended approval of the proposed resolution (RIA 01-08-03).

Council for Advancement and Support of Education Awards

Chair Chandler asked Mr. West to present the advancement program update.

Mr. West congratulated campuses that received awards from CASE District VII this past December. Mr. West added that each year the Council for Advancement and Support of Education (CASE) honors superior achievement in the field of university advancement. He noted that as in prior years, the CSU made an impressive showing with a number of awardees from several CSU campuses.

Chair Chandler added her congratulations to all the award recipients and adjourned the meeting.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Naming of an Academic Entity—California State University, East Bay and California State University, San Bernardino

Presentation by

Richard P. West
Executive Vice Chancellor and
Chief Financial Officer

Summary

This item will consider naming the lifelong learning program at California State University, East Bay and the seniors program at the California State University San Bernardino, Palm Desert campus, as Osher Lifelong Learning Institutes.

This proposal, submitted by California State University, East Bay and California State University, San Bernardino, meets the criteria and other conditions specified in the Board of Trustees Policy on Naming California State University Colleges, Schools and Other Academic Entities, including approval by the system review panel and the campus faculty senates.

Background

The proposed naming recognizes \$1 million endowments provided to both California State University, East Bay and California State University, San Bernardino through the generosity of the Bernard Osher Foundation.

The Bernard Osher Foundation began its support of programs for older learners through annual gift commitments of \$100,000. As a result of the success of these programs, the Bernard Osher Foundation established a \$1 million endowment at each campus to fund the programs in perpetuity. The endowments establish the programs as part of the national network of Osher Lifelong Learning Institutes on university campuses.

The Bernard Osher Foundation was founded in 1977 by Bernard Osher, a successful businessman and community leader. A graduate of Bowdoin College, Osher pursued a successful career in business, beginning with the management of his family's hardware and plumbing supplies store in Maine, and continuing with work at Oppenheimer & Company in New York, before moving to California. There he became a founding director of World Savings, the second largest savings institution in the United States, which recently merged with Wachovia

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Corporation. His wife Barbro Osher is Consul General for Sweden in San Francisco and serves on the Osher Foundation Board of Directors.

The Bernard Osher Foundation seeks to improve the quality of life for residents throughout the United States, with emphasis on assisting residents of California and Maine, through post-secondary student scholarships as well as arts, cultural, and educational grants. The CSU has more Osher Lifelong Learning Institutes than any other university system. In addition to California State University, East Bay and California State University, San Bernardino, the Osher Foundation supports similar programs at 16 other CSU campuses.

The following resolution is recommended for approval:

RESOLVED, By the Board of Trustees of the California State University, that the lifelong learning program at California State University, East Bay, and the seniors program at California State University, San Bernardino, Palm Desert campus be named Osher Lifelong Learning Institutes.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Naming of a Facility – California State University, Fresno

Presentation By:

Richard P. West
Executive Vice Chancellor and
Chief Financial Officer

Summary

This item will consider naming the Farm Market at California State University, Fresno as the Rue and Gwen Gibson Farm Market in memory of the late Joyce Mae Gibson's parents.

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

Background

The proposed naming of the Farm Market recognizes the \$1.5 million gift made by the late Joyce Gibson to support building renovations. In addition, Ms. Gibson has made a gift to establish an endowment that will benefit the equine studies program at California State University, Fresno.

The naming honors Ms. Gibson's parents, Rue and Gwen Gibson. Rue Gibson was born in Berryville, Arkansas. An early graduate of the University of Arkansas, he received his law degree from the University of Missouri, and furthered his legal study at the University of Chicago. As a member of the Fresno law firm of Judge Harris and L.B. Hayhurst, Rue Gibson worked on bringing electricity to the foothill residents of Fresno County. Gwendolyn Tobin Gibson was born in present-day Easton, California, and received her teaching credential from what is now California State University, Fresno. She spent the next twenty years teaching in various Fresno County schools. The Gibsons raised two daughters, Joyce and Beverly, who both lived and worked in Fresno.

Joyce Mae Gibson was born in Fresno, graduated from Fresno High School, received her BA from the University of California, Los Angeles and her Master's from Stanford University. She taught in the Fresno Unified School District, served as Dean of Women's Studies at Cabrio Junior College, and went on to become a successful lawyer in the Fresno County District Attorney's Office.

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The Farm Market began in 1984 as a roadside stand to sell excess sweet-corn and fresh fruit from student-grown projects. In its first year, the Farm Market sold \$87,000 in farm products. Two years later, the market moved indoors into a corner of a post-harvest facility where grapes and stone fruit were packed. Soon after, walls and a ceiling were built to define the market space. Between 2004 and 2006 the Farm Market was equipped with modern amenities such as a temperature-controlled wine room, additional freezer space, a refrigerator for displaying dairy products, and air conditioning.

Today, the Farm Market is a community gem that showcases the entire student-grown and -produced products from the 1,000 acre farm adjacent to the campus. In 2007, over \$1 million in products were sold through the market.

The following resolution is recommended for approval:

RESOLVED, By the Board of Trustees of the California State University, that the Farm Market at California State University, Fresno shall be named the Rue and Gwen Gibson Farm Market.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Naming of an Academic Entity – California State University, Long Beach

Presentation By:

Richard P. West
Executive Vice Chancellor and
Chief Financial Officer

Summary

This item will consider naming the Department of Music at California State University, Long Beach as the Bob Cole Conservatory of Music.

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

Background

The proposed naming of the Bob Cole Conservatory of Music recognizes a \$16.4 million endowment gift from the Bob Cole Trust, including a \$15.2 million trust gift and a \$1.2 million current cash gift. This donation ranks as the largest individual gift in the history of California State University, Long Beach.

The late Bob Cole is recognized as one of the most innovative and productive real estate businessmen in the Long Beach area and beyond. His love of music was expressed at the keyboard of his Steinway piano to the delight of all who knew him.

This gift will establish the Bob Cole Conservatory of Music at California State University, Long Beach and will inaugurate the development of the first major conservatory of music established in the West during the past half century.

The mission of the Bob Cole Conservatory of Music is the education of qualified undergraduate and graduate students in the comprehensive fields of music. Financial need will not be an impediment to talented youth who will be eligible for full stipends as Bob Cole Scholars.

The following resolution is recommended for approval:

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RESOLVED, by the Board of Trustees of the California State University, that the Department of Music at California State University, Long Beach be named the Bob Cole Conservatory of Music.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Recognition for Support of San José State University

Presentation by:

Richard P. West
Executive Vice Chancellor and
Chief Financial Officer

Summary

This item will recognize Omid Kordestani for his \$3 million endowment of a chair in interdisciplinary global engineering programs at the Charles W. Davidson College of Engineering, San José State University.

Background

A San José State University alumnus, Omid Kordestani strongly believes that by providing affordable and accessible education, San José State University has enabled people like him to pursue the American dream. As an immigrant from Tehran, Mr. Kordestani received excellent training at San José State University that laid the foundation for his successful career. Mr. Kordestani believes in a new way of learning that focuses on a global perspective and interdisciplinary studies. His dedication to student success has culminated in a \$3 million endowment gift to support excellence in teaching through interdisciplinary global engineering programs such as biomedical engineering at the Charles W. Davidson College of Engineering. San José State University has recognized this support by naming his gift the Kordestani Endowed Chair.

Mr. Kordestani joined Google in May 1999 as a “business founder,” leading the development and implementation of the company’s initial business model. Since then he has brought Google to profitability in record time, generating more than \$6 billion in revenue in 2005. He is directly responsible for Google’s worldwide revenue generation efforts as well as the day-to-day operations of the company’s sales organization. In 2006, *Time Magazine* named him as one of “100 People who shape our world” and called him the “main brains behind Google’s innovative and aggressive push to reach deals with a multitude of partners and make big money through advertising.” Mr. Kordestani earned his bachelor’s degree in electrical engineering from San José State University in 1984. He also holds an M.B.A. from Stanford Graduate School of Business.

The following resolution is recommended for approval:

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RESOLVED, by the Board of Trustees of the California State University that Omid Kordestani is hereby recognized and honored for his extraordinary vision and commended for his gift of \$3 million to San José State University.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Measuring Advancement

Presentation By

Lori A. Redfearn
Assistant Vice Chancellor
Advancement Services

Theresa Mendoza
Senior Advisor
Campus Advancement Programs

Summary

The information item will present campus university advancement goals for performance.

Background

In March 2005, the Board of Trustees adopted a set of four guiding principles that measures the productivity of, and investment in, advancement operations.

1. Campuses should ensure that the advancement enterprise has resources sufficient to achieve goals. Goals and results should be consistent with the investment.
2. Campuses should establish and evaluate performance goals annually. Goals should reflect percentage increases in private support and growth in endowments, with recognition that fluctuations will occur because of the somewhat unpredictable flow of very large gifts.
3. Campuses should operate a well-rounded development program. Over time, a full range of advancement functions should be created to increase opportunities for success. These functions should include major gifts, planned giving, corporate and foundation relations, and an active annual fund.
4. A culture of philanthropy should be nurtured on each campus. Advancement goals should find their way into strategic plans, faculty at all levels should be engaged in advancement, the role of private support should be highlighted in campus communications, and volunteers should find ways for meaningful involvement in the quest by campuses to increase private support.

With the guidance of these principles, the Chancellor and campus presidents develop annual goals and performance review recommendations. The quantitative goals for each campus are attached in this report.

CSU Advancement Classification Model

Campuses are divided into three peer groups that take into consideration the maturity of a campus advancement program based on the number of full time professional fundraisers, endowment market value, and the number of individual donors.

Group I campuses typically have fewer than ten full-time fundraising professionals, less than five thousand individual donors, and endowments of less than \$25 million. The primary focus for these programs is to build infrastructure and develop a donor base. The development operation may also be engaged in some limited capital or themed campaigns. These institutions are striving to achieve a fundraising benchmark that is comparable to 10% of the state general fund allocation.

Group II campuses typically have ten to twenty full-time fundraising professionals, five to ten thousand individual donors, and endowments valued between \$25 million to \$50 million. Development programs at these institutions are striving to be more comprehensive and may include specialists in annual giving, planned giving and corporate/foundation relations. These campuses are commonly engaged in capital or themed campaigns. The expectation is that these campuses will raise private funds comparable to 10% to 15% of the state general fund allocation.

Group III campuses typically have over twenty full-time fundraising professionals, more than ten thousand individual donors, and more than \$50 million in endowment funds. Group III campuses have greater opportunity to increase investment in fundraising from non-state sources such as unrestricted gifts and endowment management fees. These programs have engaged in or are positioning for comprehensive campaigns. The fundraising benchmark for Group III campuses is 15% of the state general fund allocation.

The following chart compares gift commitments to the state general fund allocation for the last three years. Evaluation of progress in reaching benchmarks is focused on the three-year average, which helps to level fluctuations that may occur due to the receipt of significant major gifts.

Gift Commitments Compared to State General Fund Allocation

Campus	2004/05	2005/06	2006/07	Three Year Average
<i>Group I</i>				
Bakersfield	11%	13%	19%	14%
Channel Islands	7%	19%	6%	11%
Dominguez Hills	4%	2%	3%	3%
East Bay	14%	4%	6%	8%
Humboldt	7%	7%	7%	7%
Los Angeles	4%	4%	7%	5%
Maritime Academy	4%	7%	4%	5%
Monterey Bay	7%	5%	11%	8%
San Bernardino	6%	18%	11%	12%
San Marcos	13%	9%	7%	10%
Stanislaus	5%	4%	7%	5%
<i>Group I Average</i>	7%	8%	8%	8%

<i>Group II</i>				
Chico	4%	9%	6%	6%
Fullerton	7%	10%	6%	8%
Northridge	10%	12%	12%	11%
Pomona	8%	5%	8%	7%
Sacramento	5%	11%	10%	9%
San Francisco	15%	6%	9%	10%
San Jose	18%	18%	32%	23%
Sonoma	21%	17%	13%	17%
<i>Group II Average</i>	11%	11%	12%	11%

<i>Group III</i>				
Fresno	10%	17%	18%	15%
Long Beach	15%	11%	14%	13%
San Diego	32%	25%	23%	27%
San Luis Obispo	32%	23%	20%	25%
<i>Group III Average</i>	22%	19%	19%	20%

<i>System Average</i>	11%	12%	12%	12%
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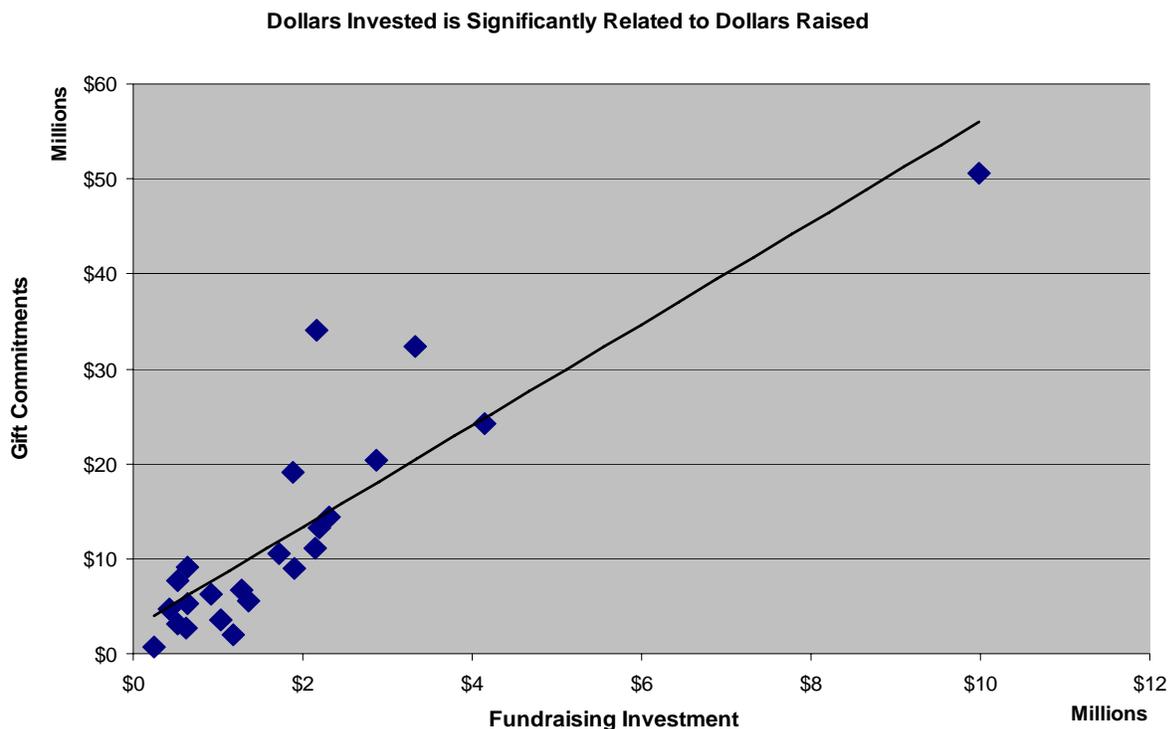
Investments in Advancement

For 2006-07, the net return on fundraising investment in relation to gift commitments of nearly \$326 million was 577%. This represents nearly \$6 raised for every dollar invested.

Overall, the California State University system spent 15 cents to raise a dollar. The median campus cost to raise a dollar was 17 cents. For a comprehensive fundraising operation, the target range for the cost to raise a dollar is 15 to 25 cents.

Investments in fundraising increased 8 percent reaching \$48 million in 2006-07 compared to \$44 million in 2005-06. The increased investment matched favorably with a 14% increase in gift commitments and an 8% increase in gift receipts. Total investments in advancement including administration, fundraising, alumni relations, public affairs and communications reached \$94 million in 2006-07 compared to \$86 million in 2005-06.

The chart below compares the three-year average of gift commitments compared to the three-year average of fundraising investments. With an 88 percent positive correlation between investments in fundraising and resulting gift commitments, the trendline below is a good indicator for understanding the investment necessary to reach fundraising goals.



Goal Matrix

Each campus has submitted a goal matrix indicating past performance, as well as goals for both gift commitments and investment in advancement programs. These goals are attached and may also be viewed at www.calstate.edu/UA/goals.

An overview of the campus advancement plans will be presented at the Board of Trustees meeting.

GOAL MATRIX

Campus Name: **BAKERSFIELD**
 Group Classification: **1**

	Actual 05/06	Actual 06/07	Goal 07/08	Goal 08/09
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PERFORMANCE INDICATORS

New Gifts	\$ 4,725,903	\$ 7,741,259		
New Pledges	\$ 2,137,204	\$ 2,668,920		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ -	\$ 300,000		
Total Gift Commitments	\$ 6,863,107	\$ 10,710,179	\$ 9,300,000	\$ 9,300,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 5,004,578	\$ 8,160,719		
Percent of Total for Current Operations	44.68%	39.41%		
Percent of Total for Endowment	51.34%	56.67%		
Percent of Total for Campus Improvements	2.01%	2.04%		
Percent of Total as Planned/Deferred	0.00%	0.00%		
Percent of Total as Unrestricted	1.97%	1.88%		
Percent of total as Loan Funds	0.00%	0.00%		
Endowment Market Value	\$ 10,318,028	\$ 16,460,000		
Endowment Distribution	\$ 369,099	\$ 261,972		
Number of Individual Donors	2,101	2,101	2,920	3,000
Number of Alumni Donors	1,150	1,100	1,700	1,870
Number of Addressable Alumni	23,047	23,971	25,750	26,714
Number of Annual and Life Alumni Paid Memberships	1,272	1,255	1,600	1,800

INVESTMENT INDICATORS

State General Fund **\$ 54,567,280** **\$ 56,557,052** **\$ 61,662,721** **\$ 64,129,230**

Advancement Investment - Sources of Funds

State General Fund	\$ 685,362	\$ 750,687	\$ 664,175	\$ 664,175
Other Sources	\$ 436,472	\$ 563,893	\$ 600,000	\$ 660,000
Total	\$ 1,121,834	\$ 1,314,580	\$ 1,264,175	\$ 1,324,175

Advancement Investment - Uses of Funds

Fundraising				
State General Fund	\$ 199,340	\$ 233,889		
Other Sources	\$ 356,042	\$ 349,622		
Fundraising Subtotal	\$ 555,382	\$ 583,511		
Alumni Relations				
State General Fund	\$ 165,535	\$ 133,652		
Other Sources	\$ 37,925	\$ 164,735		
Alumni Relations Subtotal	\$ 203,460	\$ 298,387		
Public/Community Relations				
State General Fund	\$ 185,389	\$ 208,397		
Other Sources	\$ 11,657	\$ 17,317		
Public/Community Relations Subtotal	\$ 197,046	\$ 225,714		
Administration				
State General Fund	\$ 135,098	\$ 174,749		
Other Sources	\$ 30,848	\$ 32,219		
Adminstration Subtotal	\$ 165,946	\$ 206,968		

Fundraising Staff FTE (Professional)	2.85	2.90	3.00	4.00
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	13%	19%	15%	15%
Endowment Market Value as a % of State General Fund	19%	29%		
Net Return on State General Fund Fundraising Investment	3343%	4479%		
State General Fund Fundraising Investment as a % of State General Fund	0.37%	0.41%		
State General Fund Advancement Investment as a % of State General Fund	1.26%	1.33%	1.08%	1.04%
Total Fundraising Investment as a % of State General Fund	1.02%	1.03%		
Total Advancement Investment as a % of State General Fund	2.06%	2.32%	2.05%	2.06%

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

GOAL MATRIX

Campus Name: **CHANNEL ISLANDS**
Group Classification: 1

Actual	Actual	Goal	Goal
05/06	06/07	07/08	08/09

PERFORMANCE INDICATORS

New Gifts	\$ 2,346,867	\$ 856,364		
New Pledges	\$ 3,341,721	\$ 650,761		
Indian and Local Government Contributions	\$ -	\$ 512,260		
Testamentary Commitments	\$ -	\$ -		
Total Gift Commitments	\$ 5,688,588	2,019,385	3,000,000	5,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 2,765,296	\$ 1,239,956		
Percent of Total for Current Operations	60.57%	40.69%		
Percent of Total for Endowment	3.84%	11.08%		
Percent of Total for Campus Improvements	18.86%	11.08%		
Percent of Total as Planned/Deferred	0.00%	0.00%		
Percent of Total as Unrestricted	16.74%	37.15%		
Percent of total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 10,032,000	\$ 7,722,000		
Endowment Distribution	\$ 341,000	\$ 272,000		

Number of Individual Donors	782	835	1,035	1,125
Number of Alumni Donors	1,150	112	1,500	125
Number of Addressable Alumni	1,307	1,575	2,200	2,500
Number of Annual and Life Alumni Paid Memberships	293	454	550	650

INVESTMENT INDICATORS

State General Fund	\$ 29,884,210	\$ 34,918,610	\$ 42,662,721	\$ 44,369,230
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Advancement Investment - Sources of Funds

State General Fund	\$ 1,340,428	\$ 1,534,991	\$ 1,711,600	\$ 1,825,000
Other Sources	\$ 336,170	\$ 331,385	\$ 500,000	\$ 500,000
Total	\$ 1,676,598	\$ 1,866,376	\$ 2,211,600	\$ 2,325,000

Advancement Investment - Uses of Funds

Fundraising				
State General Fund	\$ 461,454	\$ 501,063		
Other Sources	\$ 84,042	\$ 108,173		
Fundraising Subtotal	\$ 545,496	\$ 609,236.00		

Alumni Relations

State General Fund	\$ 144,705	\$ 151,790		
Other Sources	\$ 84,042	\$ 32,770		
Alumni Relations Subtotal	\$ 228,747	\$ 184,560		

Public/Community Relations

State General Fund	\$ 465,580	\$ 504,363		
Other Sources	\$ 84,042	\$ 108,885		
Public/Community Relations Subtotal	\$ 549,622	\$ 613,248		

Administration

State General Fund	\$ 268,689	\$ 377,775		
Other Sources	\$ 84,042	\$ 81,557		
Administration Subtotal	\$ 352,731	\$ 459,332		

Fundraising Staff FTE (Professional)	3.20	3.15	5.50	6.00
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	19%	6%	7%	11%
Endowment Market Value as a % of State General Fund	34%	22%		
Net Return on State General Fund Fundraising Investment	1133%	303%		
State General Fund Fundraising Investment as a % of State General Fund	1.54%	1.43%		
State General Fund Advancement Investment as a % of State General Fund	4.49%	4.40%	4.01%	4.11%
Total Fundraising Investment as a % of State General Fund	1.83%	1.74%		
Total Advancement Investment as a % of State General Fund	5.61%	5.34%	5.18%	5.24%

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

GOAL MATRIX

Campus Name: **Chico**
Group Classification: **2**

Actual Actual Goal Goal
05/06 06/07 07/08 08/09

PERFORMANCE INDICATORS

New Gifts	\$ 8,561,401	\$ 4,857,118		
New Pledges	\$ 405,000	\$ 861,500		
Testamentary Commitments (Revocable Bequests)	\$ 227,000	\$ 1,402,000		
Native American and Local Government Contributions	\$ -	\$ -		
Total Gift Commitments	\$ 9,193,401	\$ 7,120,618	\$8,500,000	\$9,000,000

Charitable Gift Receipts (New Gifts and Pledge Payments)

	\$ 8,561,401	\$ 4,857,118		
Percent of Total for Current Operations	12.66%	31.24%		
Percent of Total for Endowment	27.77%	60.14%		
Percent of Total for Campus Improvements	0.00%	0.00%		
Percent of Total as Planned/Deferred	55.37%	4.32%		
Percent of Total as Unrestricted	4.13%	4.26%		
Percentage of Total as Loan Funds	0.08%	0.00%		

Endowment Market Value	\$ 30,840,000	\$ 35,741,000		
Endowment Distribution	\$ 1,161,000	\$ 1,652,000		

Number of Individual Donors	14,410	13,241	13,000	13,900
Number of Alumni Donors	5,894	5,601	6,600	6,000
Number of Addressable Alumni	115,239	118,794	120,000	122,000
Number of Annual and Life Alumni Paid Memberships	3,648	3,671	4,000	4,250

INVESTMENT INDICATORS

State General Fund **\$ 107,406,300** **\$ 114,054,910** **\$ 120,878,966** **\$ 125,714,125**

Advancement Investment - Sources of Funds

State General Fund	\$ 2,643,857	\$ 3,147,711	\$ 2,900,000	\$ 2,900,000
Other Sources	\$ 462,559	\$ 409,269	\$ 1,000,000	\$ 1,000,000
Total	\$ 3,106,416	\$ 3,556,980	\$ 3,900,000	\$ 3,900,000

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 1,181,391	\$ 1,271,479		
Other Sources	\$ 132,021	\$ 255,569		
Fundraising Subtotal	\$ 1,313,412	\$ 1,527,048		

Alumni Relations

State General Fund	\$ 452,692	\$ 607,393		
Other Sources	\$ 199,447	\$ 105,801		
Alumni Relations Subtotal	\$ 652,139	\$ 713,194		

Public/Community Relations (excluding Governmental Relations)

State General Fund	\$ 579,841	\$ 913,369		
Other Sources	\$ 54,857	\$ 13,356		
Public/Community Relations Subtotal	\$ 634,698	\$ 926,725		

Administration

State General Fund	\$ 429,933	\$ 355,470		
Other Sources	\$ 76,234	\$ 34,543		
Administration Subtotal	\$ 506,167	\$ 390,013		

Fundraising Staff FTE (Professional)	7.67	8.31	12.00	10.00
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	9%	6%	7%	7%
Endowment Market Value as a % of State General Fund	29%	31%		
Net Return on State General Fund Fundraising Investment	678%	460%		
State General Fund Fundraising Investment as a % of State General Fund	1.10%	1.11%		
State General Fund Advancement Investment as a % of State General Fund	2.46%	2.76%	2.40%	2.31%
Total Fundraising Investment as a % of State General Fund	1.22%	1.34%		
Total Advancement Investment as a % of State General Fund	2.89%	3.12%	3.23%	3.10%

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

GOAL MATRIX

Campus Name: **DOMINGUEZ HILLS**
 Group Classification: 1

Actual	Actual	Goal	Goal
05/06	06/07	07/08	08/09

PERFORMANCE INDICATORS

New Gifts	\$ 1,236,028	\$ 1,260,615		
New Pledges	\$ 11,065	\$ 181,593		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ -	\$ 900,000		
Total Gift Commitments	\$ 1,247,093	\$ 2,342,208	\$ 1,350,000	\$ 1,375,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 2,317,276	\$ 1,322,182
Percent of Total for Current Operations	53.19%	74.69%
Percent of Total for Endowment	0.00%	8.19%
Percent of Total for Campus Improvements	43.69%	11.77%
Percent of Total as Planned/Deferred	0.00%	2.27%
Percent of Total as Unrestricted	0.42%	3.08%
Percentage of Total as Loan Funds	0.00%	0.00%

Endowment Market Value	\$ 5,959,629	\$ 6,730,000
Endowment Distribution	\$ 266,830	\$ 380,508

Number of Individual Donors	704	564	1,000	1,100
Number of Alumni Donors	329	160	300	330
Number of Addressable Alumni	57,586	55,171	68,000	74,800
Number of Annual and Life Alumni Paid Memberships	1,131	638	638	1,000

INVESTMENT INDICATORS

State General Fund	\$ 66,973,470	\$ 67,925,336	\$ 71,489,966	\$ 74,349,565
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Advancement Investment - Sources of Funds

State General Fund	\$1,904,124	\$ 1,246,652	\$1,376,890	\$1,445,735
Other Sources	\$0	\$0	\$0	\$0
Total	\$ 1,904,124	\$ 1,246,652	\$ 1,376,890	\$ 1,445,735

Advancement Investment - Uses of Funds

Fundraising				
State General Fund	\$ 762,664	\$ 254,725		
Other Sources	\$ -	\$ -		
Fundraising Subtotal	\$ 762,664	\$ 254,725		
Alumni Relations				
State General Fund	\$ 158,228	\$ 218,743		
Other Sources	\$ -	\$ -		
Alumni Relations Subtotal	\$ 158,228	\$ 218,743		
Public/Community Relations				
State General Fund	\$ 535,364	\$ 348,816		
Other Sources	\$ -	\$ -		
Public/Community Relations Subtotal	\$ 535,364	\$ 348,816		
Administration				
State General Fund	\$ 447,868	\$ 424,369		
Other Sources	\$ -	\$ -		
Administration Subtotal	\$ 447,868	\$ 424,369		

Fundraising Staff FTE (Professional)	5.33	1.29	3.00	3.30
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	2%	3%	2%	2%
Endowment Market Value as a % of State General Fund	9%	10%		
Net Return on State General Fund Fundraising Investment	64%	820%		
State General Fund Fundraising Investment as a % of State General Fund	1.14%	0.38%		
State General Fund Advancement Investment as a % of State General Fund	2.84%	1.84%	1.93%	1.94%
Total Fundraising Investment as a % of State General Fund	1.14%	0.38%		
Total Advancement Investment as a % of State General Fund	2.84%	1.84%	1.93%	1.94%

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

GOAL MATRIX

Campus Name: **EAST BAY**
Group Classification: **1**

Actual	Actual	Goal	Goal
05/06	06/07	07/08	08/09

PERFORMANCE INDICATORS

New Gifts	\$ 1,913,428	\$ 4,742,301		
New Pledges	\$ 448,050	\$ 111,602		
Testamentary Commitments	\$ 869,000	\$ 112,000		
Native American and Local Government Contributions	\$ -	\$ -		
Total Gift Commitments	\$ 3,230,478	\$ 4,965,903	\$ 1,975,000	\$ 2,560,000

Charitable Gift Receipts (New Gifts and Pledge Payments)

	\$ 5,160,699	\$ 6,837,285		
Percent of Total for Current Operations	32.06%	26.66%		
Percent of Total for Endowment	3.69%	41.49%		
Percent of Total for Campus Improvements	62.43%	29.64%		
Percent of Total as Planned/Deferred	0.00%	0.00%		
Percent of Total as Unrestricted	1.82%	2.22%		
Percent of Total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 6,132,606	\$ 9,762,407		
Endowment Distribution	\$ 195,438	\$ 252,330		

Number of Individual Donors	1,865	2,109	2,100	2,200
Number of Alumni Donors	1,261	1,392	1,450	1,500
Number of Addressable Alumni	73,130	91,362	91,000	91,000
Number of Annual and Life Alumni Paid Memberships	2,604	2,509	2,600	2,700

INVESTMENT INDICATORS

State General Fund	\$ 81,269,700	\$ 85,895,030	\$ 90,684,250	\$ 94,311,620
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Advancement Investment - Sources of Funds

State General Fund	\$ 1,625,111	\$ 1,702,673	\$ 1,600,000	\$ 1,760,000
Other Sources	\$ 127,997	\$ 207,211	\$ 210,000	\$ 220,500
Total	\$ 1,753,108	\$ 1,909,884	\$ 1,810,000	\$ 1,980,500

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 870,359	\$ 1,012,046		
Other Sources	\$ 33,521	\$ 116,724		
Fundraising Subtotal	\$ 903,880	\$ 1,128,770		

Alumni Relations

State General Fund	\$ 401,731	\$ 335,141		
Other Sources	\$ 71,783	\$ 61,350		
Alumni Relations Subtotal	\$ 473,514	\$ 396,491		

Public/Community Relations

State General Fund	\$ 204,637	\$ 195,217		
Other Sources		\$ 4,940		
Public/Community Relations Subtotal	\$ 204,637	\$ 200,157		

Administration

State General Fund	\$ 148,384	\$ 160,269		
Other Sources	\$ 22,693	\$ 24,196		
Administration Subtotal	\$ 171,077	\$ 184,465		

Fundraising Staff FTE (Professional)	6.61	6.45	8.45	9.45
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	4%	6%	2%	3%
Endowment Market Value as a % of State General Fund	8%	11%		

Net Return on State General Fund Fundraising Investment	271%	391%		
State General Fund Fundraising Investment as a % of State General Fund	1.07%	1.18%		
State General Fund Advancement Investment as a % of State General Fund	2.00%	1.98%	1.76%	1.87%

Total Fundraising Investment as a % of State General Fund	1.11%	1.31%		
Total Advancement Investment as a % of State General Fund	2.16%	2.22%	2.00%	2.10%

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

GOAL MATRIX

Campus Name: **FRESNO**
 Group Classification: **3**

Actual	Actual	Goal	Goal
05/06	06/07	07/08	08/09

PERFORMANCE INDICATORS

New Gifts	\$ 13,427,200	\$ 10,212,143		
New Pledges	\$ 6,635,729	\$ 11,965,586		
Native American and Local Government Contributions	\$ -	\$ 3,243,983		
Testamentary Commitments	\$ 1,960,000	\$ 445,000		
Total Gift Commitments	\$ 22,022,929	\$ 25,866,712	\$ 27,600,000	\$ 29,000,000

Charitable Gift Receipts (New Gifts and Pledge Payments)

	\$ 14,699,500	\$ 15,220,957		
Percent of Total for Current Operations	71.55%	71.24%		
Percent of Total for Endowment	19.28%	19.04%		
Percent of Total for Campus Improvements	7.60%	8.08%		
Percent of Total as Planned/Deferred	0.24%	0.16%		
Percent of Total as Unrestricted	1.34%	1.48%		
Percent of Total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 100,344,726	\$ 112,847,758		
Endowment Distribution	\$ 5,194,775	\$ 5,320,846		
Number of Individual Donors	7,097	7,247	7,824	7,972
Number of Alumni Donors	2,853	3,402	3,145	3,742
Number of Addressable Alumni	160,059	160,113	176,465	176,124
Number of Annual and Life Alumni Paid Memberships	6,822	7,593	7,521	8,352

INVESTMENT INDICATORS

State General Fund **\$ 133,028,700** **\$ 141,068,740** **\$ 153,752,550** **\$ 159,902,652**

Advancement Investment - Sources of Funds				
State General Fund	\$ 3,382,792	\$ 3,556,871	\$ 3,708,709	\$ 3,847,155
Other Sources	\$ 2,488,488	\$ 3,035,462	\$ 3,841,310	\$ 3,861,080
Total	\$ 5,871,280	\$ 6,592,333	\$ 7,550,019	\$ 7,708,235

Advancement Investment - Uses of Funds				
Fundraising				
State General Fund	\$ 1,581,623	\$ 1,819,916		
Other Sources	\$ 1,565,504	\$ 1,969,878		
Fundraising Subtotal	\$ 3,147,127	\$ 3,789,794		

Alumni Relations				
State General Fund	\$ 510,992	\$ 496,699		
Other Sources	\$ 247,247	\$ 406,586		
Alumni Relations Subtotal	\$ 758,239	\$ 903,285		

Public/Community Relations				
State General Fund	\$ 793,796	\$ 744,103		
Other Sources	\$ 168,847	\$ 162,127		
Public/Community Relations Subtotal	\$ 962,643	\$ 906,230		

Administration				
State General Fund	\$ 496,381	\$ 496,153		
Other Sources	\$ 506,890	\$ 496,871		
Administration Subtotal	\$ 1,003,271	\$ 993,024		

Fundraising Staff FTE (Professional)	18.60	16.75	22.30	18.00
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	17%	18%	18%	18%
Endowment Market Value as a % of State General Fund	75%	80%		
Net Return on State General Fund Fundraising Investment	1292%	1321%		
State General Fund Fundraising Investment as a % of State General Fund	1.19%	1.29%		
State General Fund Advancement Investment as a % of State General Fund	2.54%	2.52%	2.41%	2.41%
Total Fundraising Investment as a % of State General Fund	2.37%	2.69%		
Total Advancement Investment as a % of State General Fund	4.41%	4.67%	4.91%	4.82%

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

GOAL MATRIX

Campus Name: **FULLERTON**
Group Classification: **2**

Actual	Actual	Goal	Goal
05/06	06/07	07/08	08/09

PERFORMANCE INDICATORS

New Gifts	\$ 8,190,991	\$ 7,356,605		
New Pledges	\$ 3,025,802	\$ 969,322		
Native American and Local Government Contributions	\$ -	\$ 4,000		
Testamentary Commitments	\$ 3,500,000	\$ 1,000,000		
Total Gift Commitments	\$ 14,716,793	\$ 9,329,927	\$14,000,000	\$20,000,000

Charitable Gift Receipts (New Gifts and Pledge Payments)

	\$ 9,011,721	\$ 9,940,179
Percent of Total for Current Operations	54.52%	49.00%
Percent of Total for Endowment	30.59%	20.93%
Percent of Total for Campus Improvements	10.47%	24.73%
Percent of Total as Planned/Deferred	1.99%	3.30%
Percent of Total as Unrestricted	2.42%	2.76%
Percent of Total as Loan Funds	0.00%	0.00%

Endowment Market Value	\$ 13,377,000	\$ 17,592,146
Endowment Distribution	\$ 235,920	\$ 316,831

Number of Individual Donors	7,008	7,539	8,500	8,500
Number of Alumni Donors	4,681	5,093	5,600	6,000
Number of Addressable Alumni	149,467	154,443	157,238	170,000
Number of Annual and Life Alumni Paid Memberships	4,775	5,435	6,100	6,700

INVESTMENT INDICATORS

State General Fund	\$ 149,312,220	\$ 160,100,530	\$ 179,133,570	\$ 186,298,913
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Advancement Investment - Sources of Funds

State General Fund	\$ 6,399,457	\$ 6,778,984	\$7,044,190	\$7,012,342
Other Sources	\$ 50,700	\$ -	\$ -	\$171,600
Total	\$ 6,450,157	\$ 6,778,984	\$ 7,044,190	\$ 7,183,942

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 2,230,999	\$ 2,110,993
Other Sources	\$ -	\$ -
Fundraising Subtotal	\$ 2,230,999	\$ 2,110,993

Alumni Relations

State General Fund	\$ 717,232	\$ 838,658
Other Sources	\$ -	\$ -
Alumni Relations Subtotal	\$ 717,232	\$ 838,658

Public/Community Relations

State General Fund	\$ 2,299,724	\$ 2,378,950
Other Sources	\$ -	\$ -
Public/Community Relations Subtotal	\$ 2,299,724	\$ 2,378,950

Administration

State General Fund	\$ 1,151,502	\$ 1,450,383
Other Sources	\$ 50,700	\$ -
Administration Subtotal	\$ 1,202,202	\$ 1,450,383

Fundraising Staff FTE (Professional)	17.08	15.08	19.00	18.00
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	9.86%	5.83%	7.82%	10.74%
Endowment Market Value as a % of State General Fund	8.96%	10.99%		
Net Return on State General Fund Fundraising Investment	560%	342%		
State General Fund Fundraising Investment as a % of State General Fund	1.49%	1.32%		
State General Fund Advancement Investment as a % of State General Fund	4.29%	4.23%	3.93%	3.76%
Total Fundraising Investment as a % of State General Fund	1.49%	1.32%		
Total Advancement Investment as a % of State General Fund	4.32%	4.23%	3.93%	3.86%

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

GOAL MATRIX

Campus Name: **HUMBOLDT**
 Group Classification: **1**

Actual	Actual	Goal	Goal
05/06	06/07	07/08	08/09

PERFORMANCE INDICATORS

New Gifts	\$ 4,614,521	\$ 3,212,686		
New Pledges	\$ 207,604	\$ 1,502,046		
Native American and Local Government Contributions	\$ 81,498	\$ 1,970		
Testamentary Commitments (Revocable Bequests)	\$ -	\$ -		
Total Gift Commitments	\$ 4,903,623	\$ 4,716,702	\$4,500,000	\$ 4,725,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 4,614,521	\$ 4,829,819
Percent of Total for Current Operations	76.85%	80.76%
Percent of Total for Endowment	21.77%	15.44%
Percent of Total for Campus Improvements	0.01%	0.00%
Percent of Total as Planned/Deferred	0.00%	0.00%
Percent of Total as Unrestricted	1.37%	3.80%
Percent of Total as Loan Funds	0.00%	0.00%

Endowment Market Value	\$ 16,083,418	\$ 18,797,000
Endowment Distribution	\$ 270,859	\$ 564,000

Number of Individual Donors	4,024	7,034	3,859	7,386
Number of Alumni Donors	1,976	3,581	2,315	3,760
Number of Addressable Alumni	44,568	47,514	50,463	49,890
Number of Annual and Life Alumni Paid Memberships	3,511	3,804	4,311	3,994

INVESTMENT INDICATORS

State General Fund	\$ 68,755,676	\$ 71,134,997	\$ 76,430,027	\$ 79,487,228
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Advancement Investment - Sources of Funds

State General Fund	\$ 646,669	\$ 819,798	\$665,537	\$ 698,814
Other Sources	\$ 123,723	\$ 199,033	\$121,128	\$ 127,184
Total	\$ 770,392	\$ 1,018,831	\$786,665	\$ 825,999

Advancement Investment - Uses of Funds

Fundraising				
State General Fund	\$ 322,815	\$ 499,773		
Other Sources	\$ 48,062	\$ 136,822		
Fundraising Subtotal	\$ 370,877	\$ 636,595		

Alumni Relations

State General Fund	\$ 174,359	\$ 244,717		
Other Sources	\$ 75,661	\$ 62,211		
Alumni Relations Subtotal	\$ 250,020	\$ 306,928		

Public/Community Relations

State General Fund	\$ 132,179	\$ 167,957		
Other Sources	\$ -	\$ -		
Public/Community Relations Subtotal	\$ 132,179	\$ 167,957		

Administration

State General Fund	\$ 17,316	\$ 152,068		
Other Sources	\$ -	\$ -		
Administration Subtotal	\$ 17,316	\$ 152,068		

Fundraising Staff FTE (Professional)	1.85	3.53	4.00	4.00
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	7%	7%	6%	6%
Endowment Market Value as a % of State General Fund	23%	26%		
Net Return on State General Fund Fundraising Investment	1419%	844%		
State General Fund Fundraising Investment as a % of State General Fund	0.47%	0.70%		
State General Fund Advancement Investment as a % of State General Fund	0.94%	1.15%	0.87%	0.88%
Total Fundraising Investment as a % of State General Fund	0.54%	0.89%		
Total Advancement Investment as a % of State General Fund	1.12%	1.43%	1.03%	1.04%

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

GOAL MATRIX

Campus Name: **LONG BEACH**
Group Classification: **3**

	Actual 05/06	Actual 06/07	Goal 07/08	Goal 08/09
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PERFORMANCE INDICATORS

New Gifts	\$ 12,251,913	\$ 13,672,529		
New Pledges	\$ 1,249,812	\$ 828,059		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ 6,695,492	\$ 12,844,302		
Total Gift Commitments	\$ 20,197,217	\$ 27,344,890	\$30,000,000	\$33,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 12,677,413	\$ 14,848,098		
Percent of Total for Current Operations	69.10%	64.12%		
Percent of Total for Endowment	13.24%	15.70%		
Percent of Total for Campus Improvements	7.27%	5.06%		
Percent of Total as Planned/Deferred	2.05%	7.14%		
Percent of Total as Unrestricted	8.34%	7.94%		
Percent of Total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 31,512,977	\$ 36,072,454		
Endowment Distribution	\$ 1,338,771	\$ 1,424,387		

Number of Individual Donors	31,857	23,672	30,000	31,000
Number of Alumni Donors	11,059	11,832	12,200	12,600
Number of Addressable Alumni	199,858	207,370	212,000	216,000
Number of Annual and Life Alumni Paid Memberships	30,528	31,630	33,000	34,000

INVESTMENT INDICATORS

State General Fund **\$ 177,735,040** **\$ 190,215,840** **\$ 213,282,982** **\$ 221,814,301**

Advancement Investment - Sources of Funds

State General Fund	\$ 4,799,329	\$ 6,133,231	\$ 7,493,942	\$ 7,269,124
Other Sources	\$ 1,985,679	\$ 2,149,297	\$ 2,149,297	\$ 2,084,819
Total	\$ 6,785,008	\$ 8,282,528	\$ 9,643,239	\$ 9,353,943

Advancement Investment - Uses of Funds

Fundraising				
State General Fund	2,526,872	\$ 3,402,652		
Other Sources	1,344,349	\$ 1,483,786		
Fundraising Subtotal	\$ 3,871,221	\$ 4,886,438		

Alumni Relations

State General Fund	460,035	\$ 472,001		
Other Sources	494,424	\$ 580,142		
Alumni Relations Subtotal	\$ 954,459	\$ 1,052,143		

Public/Community Relations

State General Fund	1,657,911	\$ 1,919,325		
Other Sources	135,726	\$ 79,882		
Public/Community Relations Subtotal	\$ 1,793,637	\$ 1,999,207		

Administration

State General Fund	154,511	\$ 346,094		
Other Sources	11,180	\$ 6,264		
Administration Subtotal	\$ 165,691	\$ 352,358		

Fundraising Staff FTE (Professional)	28.53	25.59	29.59	30.59
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	11.36%	14.38%	14.07%	14.88%
Endowment Market Value as a % of State General Fund	17.73%	18.96%		
Net Return on State General Fund Fundraising Investment	699%	704%		
State General Fund Fundraising Investment as a % of State General Fund	1.42%	1.79%		
State General Fund Advancement Investment as a % of State General Fund	2.70%	3.22%	3.51%	3.28%
Total Fundraising Investment as a % of State General Fund	2.18%	2.57%		
Total Advancement Investment as a % of State General Fund	3.82%	4.35%	4.52%	4.22%

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

GOAL MATRIX

Campus Name: **LOS ANGELES**
 Group Classification: **1**

Actual	Actual	Goal	Goal
05/06	06/07	07/08	08/09

PERFORMANCE INDICATORS

New Gifts	\$ 3,412,180	\$ 4,302,717		
New Pledges	\$ 718,036	\$ 657,500		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ -	\$ 3,750,000		
Total Gift Commitments	\$ 4,130,216	\$ 8,710,217	\$ 8,000,000	9,000,000

Charitable Gift Receipts (New Gifts and Pledge Payments)

	\$ 4,287,235	\$ 5,175,203
Percent of Total for Current Operations	49.21%	52.74%
Percent of Total for Endowment	17.68%	35.28%
Percent of Total for Campus Improvements	25.91%	6.11%
Percent of Total as Planned/Deferred	0.00%	0.19%
Percent of Total as Unrestricted	7.20%	5.68%
Percent of Total as Loan Funds	0.00%	0.00%

Endowment Market Value	\$ 15,613,315	\$ 18,898,708
Endowment Distribution	\$ 286,986	\$ 411,318

Number of Individual Donors	4,804	4,841	5,400	5,400
Number of Alumni Donors	3,754	4,025	4,200	4,200
Number of Addressable Alumni	105,206	106,094	120,000	107,000
Number of Annual and Life Alumni Paid Memberships	7,762	7,552	8,000	8,500

INVESTMENT INDICATORS

State General Fund	\$ 116,825,340	\$ 121,147,044	\$ 132,721,064	\$ 138,029,907
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Advancement Investment - Sources of Funds

State General Fund	\$ 2,524,510	\$ 2,507,820	\$ 2,582,113	\$ 2,646,665
Other Sources	\$ 537,782	\$ 558,649	\$ 656,199	\$ 672,604
Total	\$ 3,062,292	\$ 3,066,469	\$ 3,238,312	\$ 3,319,269

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 1,320,001	\$ 1,266,367
Other Sources	\$ 135,392	\$ 156,443
Fundraising Subtotal	\$ 1,455,393	\$ 1,422,810

Alumni Relations

State General Fund	\$ 324,386	\$ 293,779
Other Sources	\$ 351,861	\$ 349,075
Alumni Relations Subtotal	\$ 676,247	\$ 642,854

Public/Community Relations

State General Fund	\$ 472,353	\$ 524,989
Other Sources	\$ 1,115	\$ -
Public/Community Relations Subtotal	\$ 473,468	\$ 524,989

Administration

State General Fund	\$ 407,770	\$ 422,685
Other Sources	\$ 49,414	\$ 53,131
Administration Subtotal	\$ 457,184	\$ 475,816

Fundraising Staff FTE (Professional)	9.39	9.12	10.00	11.00
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	4%	7%	6%	7%
Endowment Market Value as a % of State General Fund	13%	16%		
Net Return on State General Fund Fundraising Investment	213%	588%		
State General Fund Fundraising Investment as a % of State General Fund	1.13%	1.05%		
State General Fund Advancement Investment as a % of State General Fund	2.16%	2.07%	1.95%	1.92%
Total Fundraising Investment as a % of State General Fund	1.25%	1.17%		
Total Advancement Investment as a % of State General Fund	2.62%	2.53%	2.44%	2.40%

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

GOAL MATRIX

Campus Name: **MARITIME ACADEMY**
 Group Classification: **1**

Actual 05/06	Actual 06/07	Goal 07/08	Goal 08/09
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PERFORMANCE INDICATORS

New Gifts	\$ 710,757	\$ 544,924		
New Pledges	\$ 23,000	\$ 40,000		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments (Revocable Bequests)	\$ 325,000	\$ -		
Total Gift Commitments	\$ 1,058,757	\$ 584,924	\$ 650,000	\$ 715,000

Charitable Gift Receipts (New Gifts and Pledge Payments)

	\$ 723,257	\$ 555,924		
Percent of Total for Current Operations	34.39%	35.76%		
Percent of Total for Endowment	44.79%	13.23%		
Percent of Total for Campus Improvements	0.14%	3.02%		
Percent of Total as Planned/Deferred	5.54%	0.00%		
Percent of Total as Unrestricted	15.14%	47.99%		
Percent of Total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 1,730,404	\$ 1,837,049		
Endowment Distribution	\$ 51,000	\$ 59,552		

Number of Individual Donors	512	973	700	1,150
Number of Alumni Donors	276	588	480	700
Number of Addressable Alumni	3,501	3,617	3,450	3,800
Number of Annual and Life Alumni Paid Memberships	512	3,617	0	3,800

INVESTMENT INDICATORS

State General Fund	\$ 14,351,400	\$ 15,733,940	\$ 19,033,450	\$ 19,794,788
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Advancement Investment - Sources of Funds

State General Fund	\$ 441,591	\$ 498,310	\$ 400,000	
Other Sources	\$ 85,023	\$ 284,585	\$ 650,000	
Total	\$ 526,614	\$ 782,895	\$ 1,050,000	\$ -

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 32,334	\$ 47,779		
Other Sources	\$ 68,468	\$ 78,599		
Fundraising Subtotal	\$ 100,802	\$ 126,379		

Alumni Relations

State General Fund	\$ 47,484	\$ 198,695		
Other Sources	\$ -	\$ 35,102		
Alumni Relations Subtotal	\$ 47,484	\$ 233,797		

Public/Community Relations (excluding Governmental Relations)

State General Fund	\$ 172,066	\$ 141,838		
Other Sources	\$ -	\$ 92,284		
Public/Community Relations Subtotal	\$ 172,066	\$ 234,122		

Administration

State General Fund	\$ 189,707	\$ 109,998		
Other Sources	\$ 16,555	\$ 78,599		
Administration Subtotal	\$ 206,262	\$ 188,598		

Fundraising Staff FTE (Professional)	0.35	0.35	1.50	
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	7%	4%	3%	4%
Endowment Market Value as a % of State General Fund	12%	12%		
Net Return on State General Fund Fundraising Investment	3174%	1124%		
State General Fund Fundraising Investment as a % of State General Fund	0.23%	0.30%		
State General Fund Advancement Investment as a % of State General Fund	3.08%	3.17%	2.10%	0.00%
Total Fundraising Investment as a % of State General Fund	0.70%	0.80%		
Total Advancement Investment as a % of State General Fund	3.67%	4.98%	5.52%	0.00%

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

GOAL MATRIX

Campus Name: **MONTEREY BAY**
Group Classification: **1**

PERFORMANCE INDICATORS

	Actual 05/06	Actual 06/07	Goal 07/08	Goal 07/08
New Gifts	\$ 2,364,059	\$ 5,020,916		
New Pledges	\$ 88,142	\$ 344,880		
Native American and Local Government Contributions	\$ -	\$ 154		
Testamentary Commitments	\$ -	\$ -		
Total Gift Commitments	\$ 2,452,201	\$ 5,365,950	\$ 6,215,000	\$ 5,600,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 3,242,857	\$ 7,441,514		
Percent of Total for Current Operations	57.42%	31.83%		
Percent of Total for Endowment	14.03%	32.56%		
Percent of Total for Campus Improvements	27.77%	35.08%		
Percent of Total as Planned/Deferred	0.00%	0.00%		
Percent of Total as Unrestricted	0.79%	0.53%		
Percent of Total as Loan Funds	0.00%	0.00%		
Endowment Market Value	\$ 3,832,510	\$ 4,801,223		
Endowment Distribution	\$ 29,302	\$ 345,665		
Number of Individual Donors	3,928	5,126	4,554	5,000
Number of Alumni Donors	67	106	110	115
Number of Addressable Alumni	3,445	3,906	3,938	4,300
Number of Annual and Life Alumni Paid Memberships	899	1,000	1,075	1,100

INVESTMENT INDICATORS

State General Fund **\$ 46,617,600** **\$ 49,937,090** **\$ 53,574,750** **\$ 55,717,740**

Advancement Investment - Sources of Funds

State General Fund	\$ 1,976,044	\$ 2,138,906	\$ 2,000,000	\$ 2,230,981
Other Sources	\$ 338,457	\$ 443,833	\$ 350,000	\$ 400,000
Total	\$ 2,314,501	\$ 2,582,739	\$ 2,350,000	\$ 2,630,981

Advancement Investment - Uses of Funds

Fundraising				
State General Fund	\$ 757,534	\$ 880,807		
Other Sources	\$ 266,749	\$ 370,706		
Fundraising Subtotal	\$ 1,024,283	\$ 1,251,513		
Alumni Relations				
State General Fund	\$ 181,704	\$ 185,400		
Other Sources	\$ 15,050	\$ 24,068		
Alumni Relations Subtotal	\$ 196,754	\$ 209,468		
Public/Community Relations				
State General Fund	\$ 545,883	\$ 552,628		
Other Sources	\$ 45,565	\$ 31,997		
Public/Community Relations Subtotal	\$ 591,448	\$ 584,625		
Administration				
State General Fund	\$ 490,923	\$ 520,071		
Other Sources	\$ 11,093	\$ 17,062		
Administration Subtotal	\$ 502,016	\$ 537,133		

Fundraising Staff FTE (Professional) 5.57 8.10 7.50 8.00

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	5%	11%	12%	10%
Endowment Market Value as a % of State General Fund	8%	10%		
Net Return on State General Fund Fundraising Investment	224%	509%		
State General Fund Fundraising Investment as a % of State General Fund	1.62%	1.76%		
State General Fund Advancement Investment as a % of State General Fund	4.24%	4.28%	3.73%	4.00%
Total Fundraising Investment as a % of State General Fund	2.20%	2.51%		
Total Advancement Investment as a % of State General Fund	4.96%	5.17%	4.39%	4.72%

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

GOAL MATRIX

Campus Name: **NORTHRIDGE**
Group Classification: **2**

	Actual 05/06	Actual 06/07	Goal 07/08	Goal 08/09
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PERFORMANCE INDICATORS

New Gifts	\$ 10,133,643	\$ 6,801,419		
New Pledges	\$ 1,985,335	\$ 10,496,307		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ 7,802,500	\$ 3,945,000		
Total Gift Commitments	\$ 19,921,478	\$ 21,242,726	\$ 21,000,000	\$ 23,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 20,611,819	\$ 8,624,980		
Percent of Total for Current Operations	56.16%	76.54%		
Percent of Total for Endowment	18.14%	20.28%		
Percent of Total for Campus Improvements	9.18%	0.74%		
Percent of Total as Planned/Deferred	15.89%	1.14%		
Percent of Total as Unrestricted	0.63%	1.31%		
Percent of Total as Loan Funds	0.00%	0.00%		
Endowment Market Value	\$ 52,663,000	\$ 60,227,000		
Endowment Distribution	\$ 1,520,000	\$ 1,978,000		
Number of Individual Donors	7,900	7,040	9,000	9,000
Number of Alumni Donors	2,956	3,236	4,000	4,000
Number of Addressable Alumni	184,626	191,036	185,000	189,000
Number of Annual and Life Alumni Paid Memberships	3,909	5,341	7,670	10,000

INVESTMENT INDICATORS

State General Fund **\$ 165,297,980** **\$ 180,010,350** **\$ 185,410,661** **\$ 190,972,980**

Advancement Investment - Sources of Funds

State General Fund	\$ 4,368,887	\$ 4,512,420	\$ 4,700,000	\$ 4,900,000
Other Sources	\$ 588,023	\$ 753,713	\$ 800,000	\$ 1,000,000
Total	\$ 4,956,910	\$ 5,266,133	\$ 5,500,000	\$ 5,900,000

Advancement Investment - Uses of Funds

Fundraising				
State General Fund	\$ 1,871,090	\$ 1,915,228		
Other Sources	\$ 50,730	\$ 64,530		
Fundraising Subtotal	\$ 1,921,820	\$ 1,979,758		
Alumni Relations				
State General Fund	\$ 454,962	\$ 487,467		
Other Sources	\$ 411,521	\$ 404,772		
Alumni Relations Subtotal	\$ 866,483	\$ 892,239		
Public/Community Relations				
State General Fund	\$ 1,577,506	\$ 1,629,196		
Other Sources	\$ 11,812	\$ 52,734		
Public/Community Relations Subtotal	\$ 1,589,318	\$ 1,681,930		
Administration				
State General Fund	\$ 465,329	\$ 480,529		
Other Sources	\$ 113,959	\$ 214,106		
Administration Subtotal	\$ 579,288	\$ 694,635		

Fundraising Staff FTE (Professional) 15.45 14.85 17 18

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	12.05%	11.80%	11.33%	12.04%
Endowment Market Value as a % of State General Fund	31.86%	33.46%		
Net Return on State General Fund Fundraising Investment	965%	1009%		
State General Fund Fundraising Investment as a % of State General Fund	1.13%	1.06%		
State General Fund Advancement Investment as a % of State General Fund	2.64%	2.51%		
Total Fundraising Investment as a % of State General Fund	1.16%	1.10%		
Total Advancement Investment as a % of State General Fund	3.00%	2.93%		

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

GOAL MATRIX

Campus Name: **POMONA**
 Group Classification: **2**

Actual 05/06	Actual 06/07	Goal 07/08	Goal 08/09
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PERFORMANCE INDICATORS

New Gifts	\$ 5,914,296	\$ 10,070,687		
New Pledges	\$ 525,000	\$ 891,914		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ -	\$ -		
Total Gift Commitments	\$ 6,439,296	\$ 10,962,601	\$ 15,000,000	\$ 17,500,000

Charitable Gift Receipts (New Gifts and Pledge Payments)

	\$ 6,359,796	\$ 10,117,890		
Percent of Total for Current Operations	59.36%	40.04%		
Percent of Total for Endowment	34.31%	33.93%		
Percent of Total for Campus Improvements	1.68%	22.36%		
Percent of Total as Planned/Deferred	0.00%	0.00%		
Percent of Total as Unrestricted	4.65%	3.67%		
Percent of Total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 27,403,799	\$ 33,716,459		
Endowment Distribution	\$ 290,967	\$ 1,147,834		

Number of Individual Donors	1,789	1,409	1,750	2,000
Number of Alumni Donors	4,534	4,143	4,750	5,500
Number of Addressable Alumni	100,706	104,745	108,795	112,845
Number of Annual and Life Alumni Paid Memberships	3,188	3,218	3,282	3,347

INVESTMENT INDICATORS

State General Fund	\$ 129,173,000	\$ 137,339,580	\$ 146,607,350	\$ 152,471,644
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Advancement Investment - Sources of Funds

State General Fund	\$ 3,170,885	\$ 3,498,960	4,558,073	4,649,234
Other Sources	\$ 523,803	\$ 467,866	511,500	521,730
Total	\$ 3,694,688	\$ 3,966,826	\$ 5,069,573	\$ 5,170,964

Advancement Investment - Uses of Fund

Fundraising

State General Fund	\$ 1,718,145	\$ 1,898,480		
Other Sources	\$ 288,909	\$ 179,455		
Fundraising Subtotal	\$ 2,007,054	\$ 2,077,935		

Alumni Relations

State General Fund	\$ 312,748	\$ 360,743		
Other Sources	\$ 16,164	\$ 37,842		
Alumni Relations Subtotal	\$ 328,912	\$ 398,585		

Public/Community Relations

State General Fund	\$ 615,658	\$ 615,070		
Other Sources	\$ 147,355	\$ 176,608		
Public/Community Relations Subtotal	\$ 763,013	\$ 791,678		

Administration

State General Fund	\$ 524,334	\$ 624,668		
Other Sources	\$ 71,375	\$ 73,961		
Administration Subtotal	\$ 595,709	\$ 698,629		

Fundraising Staff FTE (Professional)	19.70	22.75	24.70	
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	5%	8%	10%	0%
Endowment Market Value as a % of State General Fund	21%	25%		

Net Return on SGF Fundraising Investment	275%	477%		
State General Fund Fundraising Investment as a % of State General Fund	1.33%	1.38%		
State General Fund Advancement Investment as a % of State General Fund	2.45%	2.55%	3.11%	3.05%

Total Fundraising Investment as a % of State General Fund	1.55%	1.51%		
Total Advancement Investment as a % of State General Fund	2.86%	2.89%	3.46%	3.39%

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

GOAL MATRIX

Campus Name:	SACRAMENTO	Actual	Actual	Goal	Goal
Group Classification:	2	05/06	06/07	07/08	08/09

PERFORMANCE INDICATORS

New Gifts	\$ 9,435,733	\$ 8,635,290		
New Pledges	\$ 5,559,164	\$ 55,000		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments (Revocable Bequests)	\$ 1,245,000	\$ 7,555,000		
Total Gift Commitments	\$ 16,239,897	\$ 16,245,290	16,550,000	17,300,000

Charitable Gift Receipts (New Gifts and Pledge Payments)

	\$ 9,638,233	\$ 10,205,234		
Percent of Total for Current Operations	55.86%	52.11%		
Percent of Total for Endowment	17.83%	17.13%		
Percent of Total for Campus Improvements	24.74%	28.75%		
Percent of Total as Planned/Deferred	0.00%	0.05%		
Percent of Total as Unrestricted	1.58%	1.97%		
Percent of Total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 16,353,318	\$ 20,068,853		
Endowment Distribution	\$ 522,074	\$ 736,000		

Number of Individual Donors	29,511	28,522	29,500	30,000
Number of Alumni Donors	2,801	3,554	3,560	3,700
Number of Addressable Alumni	157,259	164,357	166,000	168,000
Number of Annual and Life Alumni Paid Memberships	4,751	4,457	4,460	4,500

INVESTMENT INDICATORS

State General Fund	\$ 148,849,500	\$ 157,763,638	\$ 165,543,608	\$ 172,165,352
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Advancement Investment - Sources of Funds

State General Fund	\$ 3,497,341	\$ 4,133,416	\$ 3,854,175	\$ 4,046,884
Other Sources	\$ 1,266,427	\$ 286,734	\$ 1,271,500	\$ 301,071
Total	\$ 4,763,768	\$ 4,420,150	\$ 5,125,675	\$ 4,347,954

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 1,794,302	\$ 1,703,478		
Other Sources	\$ 1,029,842	\$ -		
Fundraising Subtotal	\$ 2,824,144	\$ 1,703,478		

Alumni Relations

State General Fund	\$ 553,301	\$ 739,933		
Other Sources	\$ 236,585	\$ 286,734		
Alumni Relations Subtotal	\$ 789,886	\$ 1,026,667		

Public/Community Relations (excluding Governmental Relations)

State General Fund	\$ 825,679	\$ 1,184,169		
Other Sources	\$ -	\$ -		
Public/Community Relations Subtotal	\$ 825,679	\$ 1,184,169		

Administration

State General Fund	\$ 324,059	\$ 505,836		
Other Sources	\$ -	\$ -		
Administration Subtotal	\$ 324,059	\$ 505,836		

Fundraising Staff FTE (Professional)	20.73	13.17	14.50	15.95
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	11%	10%	10%	10%
Endowment Market Value as a % of State General Fund	11%	13%		

Net Return on State General Fund Fundraising Investment	805%	854%		
State General Fund Fundraising Investment as a % of State General Fund	1.21%	1.08%		
State General Fund Advancement Investment as a % of State General Fund	2.35%	2.62%	2.33%	2.35%

Total Fundraising Investment as a % of State General Fund	1.90%	1.08%		
Total Advancement Investment as a % of State General Fund	3.20%	2.80%	3.10%	2.53%

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

GOAL MATRIX

Campus Name: **SAN BERNARDINO**
 Group Classification: 1

Actual	Actual	Goal	Goal
05/06	06/07	07/08	08/09

PERFORMANCE INDICATORS

New Gifts	\$ 4,945,692	\$ 4,896,434		
New Pledges	\$ 1,457,143	\$ 5,185,627		
Indian and Local Government Contributions	\$ 9,717,240	\$ 512,910		
Testamentary Commitments (Revocable Bequests)	\$ -	\$ 20,000		
Total Philanthropic Productivity	\$ 16,120,075	\$ 10,614,971	\$12,600,000	\$13,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)	\$ 5,728,536	\$ 6,985,386		
Percent of Total for Current Operations	39.50%	81.35%		
Percent of Total for Endowment	10.25%	4.84%		
Percent of Total for Campus Improvements	11.84%	13.28%		
Percent of Total as Planned/Deferred	37.97%	0.36%		
Percent of Total as Unrestricted	0.45%	0.09%		
Percent of Total ad Loan Funds	0.00%	0.08%		

Endowment Market Value	\$ 11,143,074	\$ 12,651,000		
Endowment Distribution	\$ 311,600	\$ 202,000		

Number of Individual Donors	2,437	2,305	2,351	2,398
Number of Alumni Donors	1,290	1,267	1,292	1,318
Number of Addressable Alumni	53,070	62,972	64,231	65,516
Number of Annual and Life Alumni Paid Memberships	3,087	3,276	3,505	3,751

INVESTMENT INDICATORS

State General Fund	\$ 91,942,110	\$ 98,104,320	\$ 107,400,260	\$ 111,696,270
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Advancement Investment - Sources of Funds

State General Fund	\$ 3,164,765	\$ 3,556,910	\$ 3,725,836	\$ 3,874,870
Other Sources	\$ 390,944	\$ 456,572	\$ 472,565	\$ 491,467
Total	\$ 3,555,709	\$ 4,013,482	\$ 4,198,401	\$ 4,366,337

Advancement Investment - Uses of Funds

Fundraising				
State General Fund	\$ 1,314,868	\$ 1,438,997		
Other Sources	\$ 292,101	\$ 310,240		
Fundraising Subtotal	\$ 1,606,969	\$ 1,749,237		
Alumni Relations				
State General Fund	\$ 329,716	\$ 399,092		
Other Sources	\$ 32,568	\$ 66,513		
Alumni Relations Subtotal	\$ 362,284	\$ 465,605		
Public/Community Relations				
State General Fund	\$ 689,034	\$ 858,564		
Other Sources	\$ 26,848	\$ 31,996		
Public/Community Relations Subtotal	\$ 715,882	\$ 890,560		
Administration				
State General Fund	\$ 831,147	\$ 860,257		
Other Sources	\$ 39,427	\$ 47,824		
Administration Subtotal	\$ 870,574	\$ 908,081		

Fundraising Staff FTE (Professional)	10.81	10.09	10.00	10.00
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	18%	11%	12%	12%
Endowment Market Value as a % of State General Fund	12.12%	12.90%		
Net Return on State General Fund Fundraising Investment	1126%	638%		
State General Fund Fundraising Investment as a % of State General Fund	1.43%	1.47%		
State General Fund Advancement Investment as a % of State General Fund	3.44%	3.63%	3.47%	3.47%
Total Fundraising Investment as a % of State General Fund	1.75%	1.78%		
Total Advancement Investment as a % of State General Fund	3.87%	4.09%	3.91%	3.91%

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

GOAL MATRIX

Campus Name: **SAN DIEGO**
Group Classification: **3**

Actual	Actual	Goal	Goal
05/06	06/07	07/08	008/09

PERFORMANCE INDICATORS

New Gifts	\$ 41,395,777	\$ 38,301,604		
New Pledges	\$ 3,353,512	\$ 6,149,984		
Native American and Local Government Contributions	\$ 2,437,250	\$ 2,179,930		
Testamentary Commitments	\$ 607,808	\$ -		
Total Gift Commitments	\$ 47,794,347	\$ 46,631,518	\$ 60,000,000	\$ 63,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 48,940,809	\$ 49,618,328		
Percent of Total for Current Operations	71.83%	76.00%		
Percent of Total for Endowment	15.00%	11.61%		
Percent of Total for Campus Improvements	0.25%	0.21%		
Percent of Total as Planned/Deferred	12.81%	12.05%		
Percent of Total as Unrestricted	0.11%	0.13%		
Percent of Total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 97,988,000	\$ 113,853,000		
Endowment Distribution	\$ 3,723,000	\$ 4,227,000		

Number of Individual Donors	65,010	65,031	75,000	76,250
Number of Alumni Donors	7,392	7,683	9,000	9,270
Number of Addressable Alumni	186,397	184,105	200,000	206,000
Number of Annual and Life Alumni Paid Memberships	8,935	9,315	10,000	10,300

INVESTMENT INDICATORS

State General Fund	\$ 192,540,150	\$ 206,033,230	\$ 221,339,350	\$ 230,192,924
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Advancement Investment - Sources of Funds

State General Fund	\$ 6,937,656	\$ 7,844,011	\$ 7,250,000	\$ 8,250,000
Other Sources	\$ 6,509,016	\$ 6,516,219	\$ 6,750,000	\$ 7,250,000
Total	\$ 13,446,672	\$ 14,360,230	\$ 14,000,000	\$ 15,500,000

Advancement Investment - Uses of Funds

Fundraising				
State General Fund	\$ 4,501,737	\$ 5,473,023		
Other Sources	\$ 5,616,367	\$ 5,782,782		
Fundraising Subtotal	\$ 10,118,104	\$ 11,255,804		

Alumni Relations

State General Fund	\$ 717,436	\$ 697,015		
Other Sources	\$ 635,070	\$ 600,053		
Alumni Relations Subtotal	\$ 1,352,506	\$ 1,297,068		

Public/Community Relations

State General Fund	\$ 1,028,000	\$ 1,223,365		
Other Sources	\$ 111,884	\$ 69,890		
Public/Community Relations Subtotal	\$ 1,139,884	\$ 1,293,254		

Administration

State General Fund	\$ 690,483	\$ 450,610		
Other Sources	\$ 145,695	\$ 21,501		
Administration Subtotal	\$ 836,178	\$ 472,111		

Fundraising Staff FTE (Professional)	38.15	24.45	45.00	45.00
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	25%	23%	27%	27%
Endowment Market Value as a % of State General Fund	51%	55%		

Net Return on State General Fund Fundraising Investment	962%	752%		
State General Fund Fundraising Investment as a % of State General Fund	2.34%	2.66%		
State General Fund Advancement Investment as a % of State General Fund	3.60%	3.81%	3.28%	3.58%

Total Fundraising Investment as a % of State General Fund	5.26%	5.46%		
Total Advancement Investment as a % of State General Fund	6.98%	6.97%	6.33%	6.73%

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

GOAL MATRIX

Campus Name: **SAN FRANCISCO**
 Group Classification: **2**

	Actual 05/06	Actual 06/07	Goal 07/08	Goal 08/09
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PERFORMANCE INDICATORS

New Gifts	\$ 4,139,666	\$ 8,599,910		
New Pledges	\$ 1,450,469	\$ 3,422,867		
Native American and Local Government Contributions.	\$ -	\$ -		
Testamentary Commitments	\$ 2,790,000	\$ 2,451,659		
Total Gift Commitments	\$ 8,380,135	\$ 14,474,436	\$ 15,900,000	\$ 17,100,000

Charitable Gift Receipts (New Gifts and Pledge Payments)

	\$ 5,848,087	\$ 12,590,120		
Percent of Total for Current Operations	82.33%	43.42%		
Percent of Total for Endowment	11.65%	54.26%		
Percent of Total for Campus Improvements	4.20%	1.42%		
Percent of Total as Planned/Deferred	0.00%	0.00%		
Percent of Total as Unrestricted	1.81%	0.90%		
Percent of Total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 31,543,490	\$ 41,202,000		
Endowment Distribution	\$ 397,701	\$ 512,630		

Number of Individual Donors	2,594	5,339	6,000	7,000
Number of Alumni Donors	1,150	3,560	4,000	4,750
Number of Addressable Alumni*	219,543	210,700	220,000	250,000
Number of Annual and Life Alumni Paid Memberships	3,401	3,131	3,500	4,000

INVESTMENT INDICATORS

State General Fund

	\$ 143,302,700	\$ 155,868,200	\$ 171,416,331	\$ 178,272,984
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Advancement Investment - Sources of Funds

State General Fund	\$ 3,407,697	\$ 4,512,707	\$ 4,600,000	\$ 5,000,000
Other Sources	\$ 42,114	\$ 27,533	\$ 50,000	\$ 150,000
Total	\$ 3,449,811	\$ 4,540,240	\$ 4,650,000	\$ 5,150,000

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 1,976,059	\$ 3,066,721		
Other Sources	\$ 6,390	\$ 11,812		
Fundraising Subtotal	\$ 1,982,449	\$ 3,078,533		

Alumni Relations

State General Fund	\$ 324,577	\$ 576,972		
Other Sources	\$ 4,482	\$ 15,599		
Alumni Relations Subtotal	\$ 329,059	\$ 592,571		

Public/Community Relations

State General Fund	\$ 976,110	\$ 725,969		
Other Sources	\$ 31,242	\$ 122		
Public/Community Relations Subtotal	\$ 1,007,352	\$ 726,091		

Administration

State General Fund	\$ 130,951	\$ 143,045		
Other Sources	\$ -	\$ -		
Administration Subtotal	\$ 130,951	\$ 143,045		

Fundraising Staff FTE (Professional)	9.03	20.53	22.00	25.00
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	6%	9%	9%	10%
Endowment Market Value as a % of State General Fund	22%	26%		
Net Return on SGF Fundraising Investment	324%	372%		
State General Fund Fundraising Investment as a % of State General Fund	1.38%	1.97%		
State General Fund Advancement Investment as a % of State General Fund	2.38%	2.90%	2.68%	2.80%
Total Fundraising Investment as a % of State General Fund	1.38%	1.98%		
Total Advancement as a % of State General Fund	2.41%	2.91%	2.71%	2.89%

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

* Due to responses from the opt-out mailing, we are now using degree holders for our alumni count.

GOAL MATRIX

Campus Name: **SAN JOSE**
Group Classification: 2

Actual	Actual	Goal	Goal
05/06	06/07	07/08	08/09

PERFORMANCE INDICATORS

New Gifts	\$ 12,962,498	\$ 15,702,884		
New Pledges	\$ 400,346	\$ 30,342,413		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ 13,000,000	\$ 4,525,000		
Total Gift Commitments	\$ 26,362,844	\$ 50,570,297	\$30,000,000	\$35,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)

\$ 10,438,099 \$ 14,010,465 \$ 17,624,258

Percent of Total for Current Operations	71%	72.53%
Percent of Total for Endowment	3%	6.04%
Percent of Total for Campus Improvements	21%	5.29%
Percent of Total as Planned/Deferred	1%	0.71%
Percent of Total as Unrestricted	4%	7.91%
Percent of Total as Loan Funds		7.52%

Endowment Market Value	\$ 39,157,000	\$ 50,020,000
Endowment Distribution	\$ 1,674,000	\$ 1,640,547

Number of Individual Donors	6,448	7,294	7,500	7,800
Number of Alumni Donors	4,065	4,296	4,550	4,800
Number of Addressable Alumni	160,000	164,000	167,000	172,000
Number of Annual and Life Alumni Paid Memberships	11,215	8,785	12,760	15,000

INVESTMENT INDICATORS

State General Fund \$ 150,558,500 \$ 159,756,990 \$ 160,000,000 \$ 164,800,000

Advancement Investment - Sources of Funds

State General Fund	\$ 5,050,718	\$ 5,987,915	\$6,334,254	\$6,300,000
Other Sources	\$ 463,000	\$ 394,444	\$802,991	\$1,780,000
Total	\$ 5,513,718	\$ 6,382,359	\$ 7,137,245	\$ 8,080,000

Advancement Investment - Uses of Funds

Fundraising		
State General Fund	\$ 1,935,122	\$ 2,452,657
Other Sources	\$ 101,400	\$ 59,953
Fundraising Subtotal	\$ 2,036,522	\$ 2,512,610

Alumni Relations		
State General Fund	\$ 470,282	\$ 506,389
Other Sources	\$ 66,300	\$ 46,362
Alumni Relations Subtotal	\$ 536,582	\$ 552,750

Public/Community Relations		
State General Fund	\$ 938,254	\$ 1,069,939
Other Sources	\$ 7,800	\$ 5,625
Public/Community Relations Subtotal	\$ 946,054	\$ 1,075,564

Administration		
State General Fund	\$ 1,707,060	\$ 1,958,930
Other Sources	\$ 287,500	\$ 309,917
Administration Subtotal	\$ 1,994,560	\$ 2,268,847

Fundraising Staff FTE (Professional)	14.6	21.65	18.95	24
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	18%	32%	19%	21%
Endowment Market Value as a % of State General Fund	26%	31%		
Net Return on State General Fund Fundraising Investment	1262%	1962%		
State General Fund Fundraising Investment as a % of State General Fund	1.29%	1.54%		
State General Fund Advancement Investment as a % of State General Fund	3.35%	3.75%		
Total Fundraising Investment as a % of State General Fund	1.35%	1.57%		
Total Advancement Investment as a % of State General Fund	3.66%	4.00%		

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

GOAL MATRIX

Campus Name: **SAN LUIS OBISPO**
Group Classification: **3**

Actual Actual Goal Goal
05/06 06/07 07/08 08/09

PERFORMANCE INDICATORS

New Gifts	\$ 18,562,455	\$ 16,094,324		
New Pledges	\$ 8,244,925	\$ 6,722,050		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments (Revocable Bequests)	\$ 3,506,453	\$ 4,951,000		
Total Gift Commitments	\$ 30,313,833	\$ 27,767,374	33,000,000	34,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)	\$ 23,414,840	\$ 22,699,148		
Percent of Total for Current Operations	36.05%	43.14%		
Percent of Total for Endowment	39.95%	12.64%		
Percent of Total for Campus Improvements	15.85%	29.06%		
Percent of Total as Planned/Deferred	4.89%	11.84%		
Percent of Total as Unrestricted	3.26%	3.32%		
Percent of Total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 164,822,000	\$ 181,723,000		
Endowment Distribution	\$ 5,479,800	\$ 6,097,000		

Number of Individual Donors	17,728	18,421	19,300	20,000
Number of Alumni Donors	9,062	9,841	9,800	10,000
Number of Addressable Alumni	127,399	128,097	129,500	130,000
Number of Annual and Life Alumni Paid Memberships	12,847	13,051	12,750	13,450

INVESTMENT INDICATORS

State General Fund	\$ 129,995,900	\$ 139,834,230	\$ 150,281,650	\$ 156,292,916
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Advancement Investment - Sources of Funds				
State General Fund	\$ 4,398,605	\$ 5,497,859	\$ 4,950,000	\$ 5,675,000
Other Sources	\$ 2,218,206	\$ 1,684,104	\$ 2,190,000	\$ 1,900,000
Total	\$ 6,616,811	\$ 7,181,963	\$ 7,140,000	\$ 7,575,000

Advancement Investment - Uses of Funds				
Fundraising				
State General Fund	\$ 2,235,131	\$ 2,763,337		
Other Sources	\$ 1,132,986	\$ 666,063		
Fundraising Subtotal	\$ 3,368,117	\$ 3,429,400		
Alumni Relations				
State General Fund	\$ 681,703	\$ 939,843		
Other Sources	\$ 627,634	\$ 682,031		
Alumni Relations Subtotal	\$ 1,309,337	\$ 1,621,874		
Public/Community Relations				
State General Fund	\$ 1,042,565	\$ 1,184,346		
Other Sources	\$ 407,777	\$ 291,355		
Public/Community Relations Subtotal	\$ 1,450,342	\$ 1,475,701		
Administration				
State General Fund	\$ 439,206	\$ 610,333		
Other Sources	\$ 49,809	\$ 44,655		
Administration Subtotal	\$ 489,015	\$ 654,988		

Fundraising Staff FTE (Professional)	16.81	20.01	17.00	24.00
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COMPARISONS

Total Philanthropic Productivity as a % of SGF	23%	20%	22%	22%
Endowment Market Value as a % of State General Fund	127%	130%		
Net Return on SGF Fundraising Investment	1256%	905%		
State General Fund Fundraising Investment as a % of State General Fund	1.72%	1.98%		
State General Fund Advancement Investment as a % of State General Fund	3.38%	3.93%	3.29%	3.63%
Total Fundraising Investment as a % of State General Fund	2.59%	2.45%		
Total Advancement as a % of State General Fund	5.09%	5.14%	4.75%	4.85%

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

GOAL MATRIX

Campus Name: **SAN MARCOS**
Group Classification: **1**

	Actual 05/06	Actual 06/07	Goal 07/08	Goal 08/09
PERFORMANCE INDICATORS				
New Gifts	\$ 4,974,778	\$ 1,741,178		
New Pledges	\$ 30,000	\$ 2,200,250		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ -	\$ -		
Total Gift Commitments	\$ 5,004,778	\$ 3,941,428	\$ 2,650,000	\$ 5,000,000
Charitable Gift Receipts (Gifts and Pledge Payments)				
	\$ 5,513,920	\$ 2,212,498		
Percent of Total for Current Operations	28.07%	86.22%		
Percent of Total for Endowment	27.71%	11.06%		
Percent of Total for Campus Improvements	42.82%	0.37%		
Percent of Total as Planned/Deferred	0.00%	0.00%		
Percent of Total as Unrestricted	1.41%	2.36%		
Percent of Total as Loan Funds	0.00%	0.00%		
Endowment Market Value	\$ 11,727,000	\$ 15,157,781		
Endowment Distribution	\$ 352,645	\$ 379,400		
Number of Individual Donors	411	979	550	1,370
Number of Alumni Donors	65	72	100	130
Number of Addressable Alumni	14,402	18,988	17,900	23,000
Number of Annual and Life Alumni Paid Memberships	798	854	825	1,000
INVESTMENT INDICATORS				
State General Fund	\$ 54,364,480	\$58,593,110	\$ 66,746,080	\$ 69,415,923
Advancement Investment - Sources of Funds				
State General Fund	\$ 1,374,624	\$ 1,386,961	1356199	1559629
Other Sources	\$ 60,126	\$ 118,545	71000	75000
Total	\$ 1,434,750	\$ 1,505,505	\$ 1,427,199	\$ 1,634,629
Advancement Investment - Uses of Funds				
Fundraising				
State General Fund	\$ 471,456	\$ 440,369		
Other Sources	\$ 42,314	\$ 80,698		
Fundraising Subtotal	\$ 513,770	\$ 521,067		
Alumni Relations				
State General Fund	\$ 208,041	\$ 181,465		
Other Sources	\$ -	\$ 36,845		
Alumni Relations Subtotal	\$ 208,041	\$ 218,310		
Public/Community Relations				
State General Fund	\$ 179,742	\$ 310,139		
Other Sources	\$ 2,959	\$ 1,002		
Public/Community Relations Subtotal	\$ 182,701	\$ 311,141		
Administration				
State General Fund	\$ 515,385	\$ 454,987		
Other Sources	\$ 14,853	\$ -		
Administration Subtotal	\$ 530,238	\$ 454,987		
Fundraising Staff FTE (Professional)	4.20	6.00	4.00	7.00
COMPARISONS				
Total Philanthropic Productivity as a % of State General Fund	9%	7%	4%	7%
Endowment Market Value as a % of State General Fund	22%	26%		
Net Return on State General Fund Fundraising Investment	962%	795%		
State General Fund Fundraising Investment as a % of State General Fund	0.87%	0.75%		
State General Fund Advancement Investment as a % of State General Fund	2.53%	2.37%	2.03%	2.25%
Total Fundraising Investment as a % of State General Fund	0.95%	0.89%		
Total Advancement as a % of State General Fund	2.64%	2.57%	2.14%	2.35%

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

GOAL MATRIX

Campus Name: **SONOMA**
 Group Classification: **2**

Actual	Actual	Goal	Goal
05/06	06/07	07/08	08/09

PERFORMANCE INDICATORS

6 New Gifts	\$ 3,725,496	\$ 5,695,613		
7 New Pledges	\$ 5,506,928	\$ 253,650		
8 Native American and Local Government Contributions	\$ -	\$ 13,721		
9 Testamentary Commitments	\$ 200,000	\$ 1,500,000		
10 Total Gift Commitments	\$ 9,432,424	\$ 7,462,984	\$ 8,000,000	\$ 8,800,000

Charitable Gift Receipts (Gifts and Pledge Payments)

\$ 6,095,751 \$ 6,124,350

13 Percent of Total for Current Operations	65.84%	37.65%		
14 Percent of Total for Endowment	8.14%	5.95%		
15 Percent of Total for Campus Improvements	13.81%	53.99%		
16 Percent of Total as Planned/Deferred	11.89%	1.98%		
17 Percent of Total as Unrestricted	0.32%	0.43%		
Percent of Total as Loan Funds	0.00%	0.00%		
19 Endowment Market Value	\$ 31,284,000	\$ 37,417,460		
20 Endowment Distribution	\$ 884,125	\$ 977,345		
22 Number of Individual Donors	2,693	2,692	3,500	3,500
23 Number of Alumni Donors	382	430	600	600
24 Number of Addressable Alumni	38,932	41,827	41,000	41,000
25 Number of Annual and Life Alumni Paid Memberships	1,558	2,238	2,200	2,200

INVESTMENT INDICATORS

28 State General Fund \$ 54,301,344 \$ 58,753,854 \$ 64,157,344 \$ 66,723,638

Advancement Investment - Sources of Funds

31 State General Fund	\$ 1,746,632	\$ 1,678,319	\$ 1,800,000	\$ 1,700,000
32 Other Sources	\$ 53,973	\$ 72,349	\$ 70,000	\$ 75,000
33 Total	\$ 1,800,605	\$ 1,750,668	\$ 1,870,000	\$ 1,775,000

Advancement Investment - Uses of Funds

Fundraising

37 State General Fund	\$ 771,855	\$ 623,229		
38 Other Sources	\$ -	\$ 18,422		
39 Fundraising Subtotal	\$ 771,855	\$ 641,651		

Alumni Relations

42 State General Fund	\$ 155,671	\$ 170,663		
43 Other Sources	\$ 43,784	\$ 43,436		
44 Alumni Relations Subtotal	\$ 199,455	\$ 214,099		

Public/Community Relations (excluding Governmental Relations)

47 State General Fund	\$ 372,942	\$ 417,522		
48 Other Sources	\$ -	\$ -		
49 Public/Community Relations Subtotal	\$ 372,942	\$ 417,522		

Administration

52 State General Fund	\$ 446,164	\$ 466,905		
53 Other Sources	\$ 10,189	\$ 10,491		
54 Administration Subtotal	\$ 456,353	\$ 477,396		

57 Fundraising Staff FTE (Professional) 2.88 4.90 6.00 5.00

COMPARISONS

60 Total Philanthropic Productivity as a % of State General Fund	17%	13%	12%	13%
61 Endowment Market Value as a % of State General Fund	58%	64%		
62 Net Return on State General Fund Fundraising Investment	1122%	1097%		
63 State General Fund Fundraising Investment as a % of State General Fund	1.42%	1.06%		
64 State General Fund Advancement Investment as a % of State General Fund	3.22%	2.86%	2.81%	2.55%
67 Total Fundraising Investment as a % of State General Fund	1.42%	1.09%		
68 Total Advancement Investment as a % of State General Fund	3.32%	2.98%	2.91%	2.66%

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

GOAL MATRIX

Campus Name: **STANISLAUS**
Group Classification: **1**

Actual 05/06	Actual 06/07	Goal 07/08	Goal 08/09
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PERFORMANCE INDICATORS

New Gifts	\$ 1,860,056	\$ 3,888,239		
New Pledges	\$ 51,269	\$ 32,031		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ -	\$ -		
Total Gift Commitments	\$ 1,911,325	\$ 3,920,270	\$ 2,112,297	\$ 2,323,526

Charitable Gift Receipts (New Gifts and Pledge Payments)

	\$ 1,978,930	\$ 3,978,028		
Percent of Total for Current Operations	84.09%	41.97%		
Percent of Total for Endowment	8.91%	54.51%		
Percent of Total for Campus Improvements	3.38%	3.15%		
Percent of Total as Planned/Deferred	0.00%	0.00%		
Percent of Total as Unrestricted	3.62%	0.37%		
Percent of Total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 7,837,282	\$ 11,000,000		
Endowment Distribution	\$ 206,127	\$ 233,000		

Number of Individual Donors	1,746	945	2,500	2,600
Number of Alumni Donors	1,196	518	1,800	2,000
Number of Addressable Alumni	35,944	37,948	43,000	43,500
Number of Annual and Life Alumni Paid Memberships	1,371	54	N/A	N/A

INVESTMENT INDICATORS

State General Fund	\$ 53,683,980	\$ 57,936,130	\$ 63,110,030	\$ 65,634,431
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Advancement Investment - Sources of Funds

State General Fund	\$ 1,520,998	\$ 1,198,885	\$ 1,440,000	\$ 1,584,000
Other Sources	\$ 110,867	\$ 23,520	\$ 100,000	\$ 100,000
Total	\$ 1,631,865	\$ 1,222,405	\$ 1,540,000	\$ 1,684,000

Advancement Investment - Uses of Funds

Fundraising				
State General Fund	\$ 590,943	\$ 398,322		
Other Sources	\$ 63,821	\$ 8,855		
Fundraising Subtotal	\$ 654,764	\$ 407,176		

Alumni Relations

State General Fund	\$ 94,766	\$ 87,256		
Other Sources	\$ -	\$ 14,665		
Alumni Relations Subtotal	\$ 94,766	\$ 101,921		

Public/Community Relations (excluding Governmental Relations)

State General Fund	\$ 411,813	\$ 389,663		
Other Sources	\$ 4,983	\$ -		
Public/Community Relations Subtotal	\$ 416,796	\$ 389,663		

Administration

State General Fund	\$ 385,940	\$ 323,644		
Other Sources	\$ 42,064	\$ -		
Administration Subtotal	\$ 428,004	\$ 323,644		

Fundraising Staff FTE (Professional)	4.45	2.37	5.00	5.00
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	4%	7%	3%	4%
Endowment Market Value as a % of State General Fund	15%	19%		

Net Return on State General Fund Fundraising Investment	223%	884%		
State General Fund Fundraising Investment as a % of State General Fund	1.10%	0.69%		
State General Fund Advancement Investment as a % of State General Fund	2.83%	2.07%	2.28%	2.41%

Total Fundraising Investment as a % of State General Fund	1.22%	0.70%		
Total Advancement Investment as a % of State General Fund	3.04%	2.11%	2.44%	2.57%

Note: Detailed breakdowns are only available for prior years. Future goals are represented as totals.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Naming of a Facility – California State University, Los Angeles

Presentation By:

Richard P. West
Executive Vice Chancellor and
Chief Financial Officer

Summary

This item will consider naming the Integrated Sciences Complex at California State University, Los Angeles as the Wallis Annenberg Integrated Sciences Complex.

This proposal, submitted by California State University, Los Angeles meets the criteria and other conditions specified in the Board of Trustees Policy on Naming California State University Facilities, including approval by the system review panel and the campus Academic Senate.

Background

The proposed naming recognizes a recent \$5 million gift commitment, the largest single cash gift given to the Integrated Sciences Complex and to California State University, Los Angeles as a whole. The gift is being made by The Annenberg Foundation which is a strong supporter of educational and community causes in the United States.

In 2004, California State University, Los Angeles began construction on the Integrated Sciences Complex, which will house classroom and state-of-the-art laboratory space for the natural sciences comprised of two distinct wings. Wing A is nearing completion, and plans to begin the construction of Wing B are underway. In an earlier resolution, the CSU Board of Trustees approved the naming of Wing A as LaKretz Hall. The Wallis Annenberg naming will span Wing A and Wing B to incorporate the entire complex. California State University, Los Angeles has reserved the right to name Wing B and other component parts of the Complex in the future.

Wallis Annenberg is the only daughter of the late Walter H. Annenberg, a man who enjoyed a distinguished career as a publisher, broadcaster, diplomat and philanthropist. Ms. Annenberg is currently the Vice President and a member of the Board of Trustees of The Annenberg Foundation, one of the largest family foundations in the United States. Based in Los Angeles, Ms. Annenberg is a visionary who strives to improve the well-being of people and communities through the world. She has spent much of her life focused on philanthropy and is dedicated to

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education; communications; arts and culture; social justice; medical research; animal welfare; and environmental stewardship. Under her leadership, the Los Angeles office of The Annenberg Foundation has given more than a quarter billion dollars to over 500 organizations. Ms. Annenberg also worked for 14 years at TV Guide as a story editor. She is the mother of four children.

The following resolution is recommended for approval:

RESOLVED, By the Board of Trustees of the California State University, that the Integrated Sciences Complex at California State University, Los Angeles, be named the Wallis Annenberg Integrated Sciences Complex.