

AGENDA

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Meeting: 8:45 a.m., Wednesday, March 25, 2009
Glenn S. Dumke Auditorium

George G. Gowgani, Chair
Peter G. Mehas, Vice Chair
Carol R. Chandler
Debra S. Farar
Kenneth Fong
A. Robert Linscheid
Craig R. Smith
Glen O. Toney
Kyriakos Tsakopoulos

Consent Item

Approval of Meeting Minutes of January 27, 2009

Discussion Items

1. Naming of an Academic Entity and Facility – California Maritime Academy,
Action
2. Measuring Advancement, *Information*

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

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

January 27, 2009

Members Present

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

Approval of Minutes

The minutes of November 18, 2008 were approved.

Naming of a Facility – California State University, Bakersfield, *Action*

Chair Gowgani asked Mr. Garrett P. Ashley, vice chancellor, university relations and advancement, to present the request to name the baseball playing and practice field at the California State University, Bakersfield, as Hardt Field.

Mr. Ashley stated the proposed naming honors alumnus Thomas (Tom) Hardt and his wife Barbara Hardt. The couple contributed \$1 million as well as the in-kind donation of on-going general contracting work for a new, top-level baseball training and playing facility.

President Mitchell commented that Mr. and Mrs. Hardt are outstanding members of the community. Mr. Hardt has used his contacts within the construction industry to stretch the cash gift and obtain additional in-kind gifts. The university is very pleased to make the recommendation that the field be named in their honor.

The committee recommended approval of the proposed resolution (RIA 01-09-01).

Resolution of Commendation – California State Polytechnic University, Pomona, *Action*

The presentation of this item was acted upon out of order to accommodate the delayed arrival of Carol and James A. Collins.

Chair Gowgani asked Mr. Ashley to present the resolution of commendation.

Mr. Ashley recognized Carol and James A. Collins for their tremendous generosity to California State Polytechnic University, Pomona. Mr. and Mrs. Collins pledged to match dollar for dollar \$5 million in donations for a new academic building for the Collins College of Hospitality Management. The building lay the foundation for expanded programs, including the state's first graduate program in hospitality management. Mr. and Mrs. Collins are the largest private individual donors to California State Polytechnic University, Pomona having substantially supported the institution for more than 20 years.

President Ortiz commended Mr. and Mrs. Collins for helping the university pioneer a program in Hotel, Restaurant and Travel. They believed then and still do today in the importance of preparing the next generation of hospitality industry professionals. The partnership with the Collins and their influence with other hospitality leaders have made the Collins College of Hospitality Management one of the premiere hospitality programs in the nation.

The committee recommended approval of the proposed resolution (RIA 01-09-02).

Chancellor Reed thanked Mr. and Mrs. Collins for their generous support. He shared that the Collin's began their careers with a little hamburger stand that grew into an international hospitality conglomerate. The Collins College of Hospitality Management has enjoyed the same trajectory of success.

Mr. Collins expressed his gratitude for this honor. He shared that the most fun they get out of life is giving away money, and it has been a pleasure working with President Ortiz.

Chancellor Reed and Chair Bleich presented Mr. and Mrs. Collins with a resolution certificate recognizing the commendation.

2006-2007 Annual Report on External Support, *Action*

Chair Gowgani stated the 2007-2008 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 Gowgani called attention to a hard copy version of the report distributed earlier, and asked Mr. Ashley to present the report.

Mr. Ashley congratulated presidents, their campus teams, and donors for achieving a record \$442 million in gift commitments and a total \$1.6 billion in external support for 2007-08. External

support is vital to the university's ability to remain adaptable to workforce needs and the cultivation of creativity. He noted, however, that external support does not displace the need for state support.

He asked Ms. Lori Redfearn, assistant vice chancellor of advancement services, to present the report's data.

Ms. Redfearn provided a comprehensive overview of the challenges, successes, and overall status of the university's external support activities during 2007-2008. The \$1.6 billion in external support represented a 12% increase over the prior year.

Growth in grants and contracts accounted for \$61 million or 5% of the growth in external support for 2007-2008. Within the \$743 million of federal support, about \$406 million was dedicated to student financial aid grants.

Philanthropic support in 2007-2008 increased by \$116 million compared to the 2006-2007 numbers, a 35% gain. Ms. Redfearn provided a breakout of gift commitments by campus group. All three campus groups experienced increases in real dollars, with Group I posting a 30% increase and Group III posting a 70% increase. Twelve out of the twenty-three campuses saw giving increases in 2007-2008. She noted that two extraordinarily large testamentary gifts committed to California State University, San Bernardino and California Polytechnic State University, San Luis Obispo were the main drivers of the increased giving.

Endowment market value declined in 2007-08 to \$854 million with a 5.2% loss in investment returns. This value was as of June 30, 2008 and an informal survey of campuses indicated about a 20% investment loss from that date through November 30, 2008. Endowment losses will impact the funds available in 2009-10 for student scholarships and program support.

Regarding gifts by purpose, over 97% of all charitable gifts were designated by donors to meet specific needs. Only \$6 million of gifts received were unrestricted.

The 2007-2008 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 01-09-03).

Council for Advancement and Support of Education Awards, *Information*

Chair Gowgani asked Mr. Ashley to present the advancement program update.

Mr. Ashley congratulated campuses that received awards from the Council for Advancement and Support of Education (CASE) District VII this past December. He added that each year CASE honors superior achievement in the field of university advancement. Mr. Ashley referred the Trustees to the list of awardees listed in the meeting agenda item.

Chair Gowgani adjourned the meeting.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Naming of an Academic Entity and Facility – California Maritime Academy

Presentation By:

Garrett P. Ashley
Vice Chancellor
University Relations and Advancement

Summary

This item will consider naming the School of Maritime Policy and Management, at California Maritime Academy as the ABS School of Maritime Policy and Management and the Radar Lab Building, at California Maritime Academy as ABS Lecture Hall.

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

Background

Alumni and the maritime industry strongly encouraged the California Maritime Academy to create a course of study that focuses on the strategic policy issues confronting the international maritime community. Alumni identify policy education as important to career advancement. Industry leaders express a desire to hire and promote managers with both ship skills and policy experience. The School of Maritime Policy and Management was developed to meet these needs.

The ABS (formerly The American Bureau of Shipping) company is the preeminent classification and certification society in maritime administration acting on behalf of more than 100 governments. ABS is based in Houston, Texas with offices throughout the world.

ABS has also become the leader in philanthropy in the international maritime community. Previously, the California Maritime Academy has benefitted from both generous scholarship gifts and the company's continuing interest in hiring its graduates. A current \$3 million gift in support of the School of Maritime Policy and Management is the largest gift in the history of the California Maritime Academy.

Inst. Adv.
Agenda Item 1
March 24-25, 2009
Page 2 of 2

The following resolution is recommended for approval:

RESOLVED, By the Board of Trustees of the California State University that the School of Maritime Policy and Management, at California Maritime Academy be named the ABS School of Maritime Policy and Management and the Radar Lab Building, at California Maritime Academy be named ABS Lecture Hall.

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	2005/06	2006/07	2007/08	Three Year Average
<i>Group I</i>				
Bakersfield	13%	19%	7%	13%
Channel Islands	19%	6%	7%	11%
Dominguez Hills	2%	3%	3%	3%
East Bay	4%	6%	2%	4%
Humboldt	7%	7%	4%	6%
Los Angeles	4%	7%	7%	6%
Maritime Academy	7%	4%	6%	6%
Monterey Bay	5%	11%	10%	9%
San Bernardino	18%	11%	38%	22%
San Marcos	9%	7%	4%	7%
Stanislaus	4%	7%	4%	5%
<i>Group I Average</i>	8%	8%	10%	9%

<i>Group II</i>				
Chico	9%	6%	9%	8%
Fullerton	10%	6%	19%	12%
Northridge	12%	12%	10%	11%
Pomona	5%	8%	4%	6%
Sacramento	11%	10%	11%	11%
San Francisco	6%	9%	10%	8%
San Jose	18%	32%	15%	22%
Sonoma	17%	13%	21%	17%
<i>Group II Average</i>	11%	12%	12%	12%

<i>Group III</i>				
Fresno	17%	18%	16%	17%
Long Beach	11%	14%	17%	14%
San Diego	25%	23%	30%	26%
San Luis Obispo	23%	20%	63%	35%
<i>Group III Average</i>	19%	19%	30%	23%

<i>System Average</i>	12%	13%	16%	14%
------------------------------	------------	------------	------------	------------

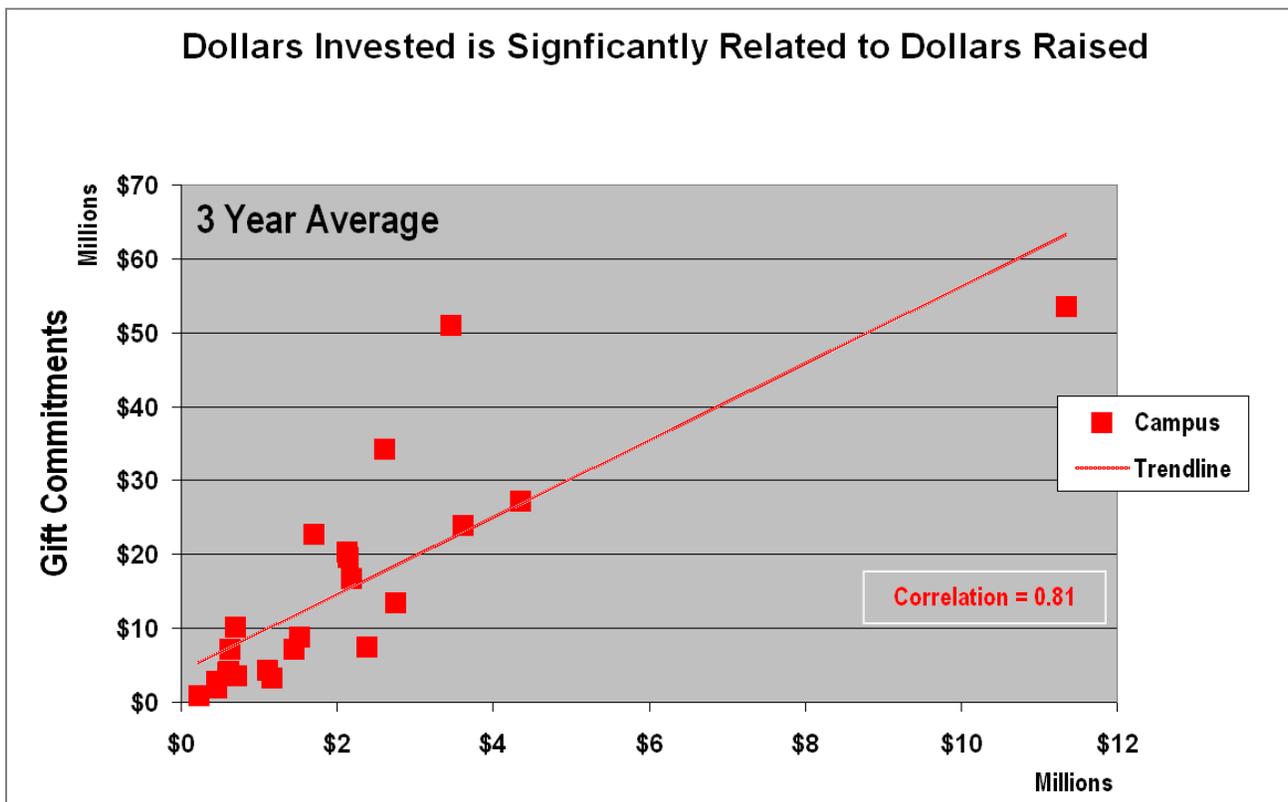
Investments in Advancement

For 2008-09, the net return on fundraising investment in relation to gift commitments of a record \$442 million was 734%. This represents over \$7 raised for every dollar invested.

Overall, the California State University system spent 12 cents to raise a dollar. The median campus cost to raise a dollar was 16 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 11 percent reaching nearly \$53 million in 2007-08 compared to almost \$48 million in 2006-07. The increased investment matched favorably with a 36% increase in gift commitments and a 13% increase in gift receipts. Total investments in advancement including administration, fundraising, alumni relations, public affairs and communications reached \$107 million in 2007-08 compared to \$94 million in 2006-07.

The chart below compares the three-year average of gift commitments compared to the three-year average of fundraising investments. With an 81 percent positive correlation between investments in fundraising and resulting gift commitments, the trendline shown 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	Actual	Goal	Goal
06/07	07/08	08/09	09/10

PERFORMANCE INDICATORS

New Gifts	\$ 7,741,259	\$ 3,129,335		
New Pledges	\$ 2,668,920	\$ 773,584		
Indian and Local Government Contributions	\$ -	\$ 275,000		
Testamentary Commitments	\$ 300,000	\$ -		
Total Gift Commitments	\$ 10,710,179	\$ 4,177,919	\$ 6,400,000	\$ 7,500,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 8,160,719	\$ 3,874,067		
Percent of Total for Current Operations	39.41%	66.26%		
Percent of Total for Endowment	56.67%	18.27%		
Percent of Total for Campus Improvements	2.04%	13.09%		
Percent of Total as Planned/Deferred	0.00%	0.00%		
Percent of Total as Unrestricted	1.88%	2.39%		
Percent of total as Loan Funds	0.00%	0.00%		
Endowment Market Value	\$ 16,460,000	\$ 16,415,000		
Endowment Distribution	\$ 261,972	\$ 472,641		
Number of Individual Donors	2,101	1,955	3,000	3,600
Number of Alumni Donors	1,100	946	1,500	1,900
Number of Addressable Alumni	23,971	24,127	25,500	26,500
Number of Annual and Life Alumni Paid Memberships	1,255	892	1,500	1,500

INVESTMENT INDICATORS

State General Fund **\$ 56,557,052** **\$ 61,662,721** **\$ 64,129,230** **\$ 66,694,399**

Advancement Investment - Sources of Funds

State General Fund	\$ 750,687	\$ 984,974	\$ 664,175	\$ 1,035,154
Other Sources	\$ 563,893	\$ 604,028	\$ 660,000	\$ 1,445,407
Total	\$ 1,314,580	\$ 1,589,002	\$ 1,324,175	\$ 2,480,561

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 233,889	\$ 346,155		
Other Sources	\$ 349,622	\$ 388,832		
Fundraising Subtotal	\$ 583,511	\$ 734,987		

Alumni Relations

State General Fund	\$ 133,652	\$ 134,821		
Other Sources	\$ 164,735	\$ 148,496		
Alumni Relations Subtotal	\$ 298,387	\$ 283,318		

Public/Community Relations

State General Fund	\$ 208,397	\$ 209,113		
Other Sources	\$ 17,317	\$ 12,198		
Public/Community Relations Subtotal	\$ 225,714	\$ 221,311		

Administration

State General Fund	\$ 174,749	\$ 294,884		
Other Sources	\$ 32,219	\$ 54,502		
Administration Subtotal	\$ 206,968	\$ 349,387		

Fundraising Staff FTE (Professional) 2.90 5.75 5.75 9.50

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	18.94%	6.78%	9.98%	11.25%
Endowment Market Value as a % of State General Fund	29.10%	26.62%		
Net Return on State General Fund Fundraising Investment	4479.17%	1106.95%		
State General Fund Fundraising Investment as a % of State General Fund	0.41%	0.56%		
State General Fund Advancement Investment as a % of State General Fund	1.33%	1.60%	1.04%	1.55%
Total Fundraising Investment as a % of State General Fund	1.03%	1.19%		
Total Advancement Investment as a % of State General Fund	2.32%	2.58%	2.06%	3.72%

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 06/07	Actual 07/08	Goal 08/09	Goal 09/10
PERFORMANCE INDICATORS				
New Gifts	\$ 856,364	\$ 2,252,899		
New Pledges	\$ 650,761	\$ 706,252		
Indian and Local Government Contributions	\$ 512,260	\$ -		
Testamentary Commitments	\$ -	\$ -		
Total Gift Commitments	\$ 2,019,385	\$ 2,959,151	\$ 4,000,000	\$ 4,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 1,239,956	\$ 3,021,648		
Percent of Total for Current Operations	40.69%	41.27%		
Percent of Total for Endowment	11.08%	34.17%		
Percent of Total for Campus Improvements	11.08%	5.79%		
Percent of Total as Planned/Deferred	0.00%	0.00%		
Percent of Total as Unrestricted	37.15%	18.77%		
Percent of total as Loan Funds	0.00%	0.00%		
Endowment Market Value	\$ 7,722,000	\$ 7,253,000		
Endowment Distribution	\$ 272,000	\$ 154,000		
Number of Individual Donors	835	928	1,125	1,125
Number of Alumni Donors	112	94	125	125
Number of Addressable Alumni	1,575	1,488	2,500	2,500
Number of Annual and Life Alumni Paid Memberships	454	861	650	650

INVESTMENT INDICATORS

State General Fund **\$ 34,918,610** **\$ 42,940,910** **\$ 44,658,546** **\$ 46,444,888**

Advancement Investment - Sources of Funds

State General Fund	\$ 1,534,991	\$ 2,133,865	\$ 2,197,880	\$ 2,225,000
Other Sources	\$ 331,385	\$ 559,467	\$ 672,000	\$ 692,000
Total	\$ 1,866,376	\$ 2,693,332	\$ 2,869,880	\$ 2,917,000

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 501,063	\$ 777,763		
Other Sources	\$ 108,173	\$ 172,101		
Fundraising Subtotal	\$ 609,236	\$ 949,864		

Alumni Relations

State General Fund	\$ 151,790	\$ 198,219		
Other Sources	\$ 32,770	\$ 43,861		
Alumni Relations Subtotal	\$ 184,560	\$ 242,080		

Public/Community Relations

State General Fund	\$ 504,363	\$ 644,946		
Other Sources	\$ 108,885	\$ 142,712		
Public/Community Relations Subtotal	\$ 613,248	\$ 787,658		

Administration

State General Fund	\$ 377,775	\$ 512,937		
Other Sources	\$ 81,557	\$ 200,793		
Administration Subtotal	\$ 459,332	\$ 713,730		

Fundraising Staff FTE (Professional) 3.15 3.70 4.00 5.00

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	5.78%	6.89%	8.96%	8.61%
Endowment Market Value as a % of State General Fund	22.11%	16.89%		
Net Return on State General Fund Fundraising Investment	303.02%	280.47%		
State General Fund Fundraising Investment as a % of State General Fund	1.43%	1.81%		
State General Fund Advancement Investment as a % of State General Fund	4.40%	4.97%	4.92%	4.79%
Total Fundraising Investment as a % of State General Fund	1.74%	2.21%		
Total Advancement Investment as a % of State General Fund	5.34%	6.27%	6.43%	6.28%

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
06/07	07/08	08/09	09/10

PERFORMANCE INDICATORS

New Gifts	\$ 4,857,118	\$ 6,473,975		
New Pledges	\$ 861,500	\$ 160,000		
Indian and Local Government Contributions	\$ 1,402,000	\$ -		
Testamentary Commitments	\$ -	\$ 3,650,000		
Total Gift Commitments	\$ 7,120,618	\$ 10,283,975	\$ 9,000,000	\$ 9,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 4,857,118	\$ 6,807,545		
Percent of Total for Current Operations	31.24%	25.76%		
Percent of Total for Endowment	60.14%	66.47%		
Percent of Total for Campus Improvements	0.00%	0.00%		
Percent of Total as Planned/Deferred	4.32%	2.06%		
Percent of Total as Unrestricted	4.26%	5.68%		
Percent of total as Loan Funds	0.00%	0.03%		
Endowment Market Value	\$ 35,741,000	\$ 34,656,000		
Endowment Distribution	\$ 1,652,000	\$ 1,740,000		
Number of Individual Donors	13,241	13,761	13,900	14,000
Number of Alumni Donors	5,601	5,834	6,000	6,000
Number of Addressable Alumni	118,794	126,058	122,000	129,000
Number of Annual and Life Alumni Paid Memberships	3,671	2,904	4,250	3,000

INVESTMENT INDICATORS

State General Fund **\$ 114,054,910** **\$ 120,878,800** **\$ 125,713,952** **\$ 130,742,510**

Advancement Investment - Sources of Funds

State General Fund	\$ 3,147,711	\$ 3,631,764	\$ 2,900,000	\$ 2,755,000
Other Sources	\$ 409,269	\$ 543,206	\$ 1,000,000	\$ 1,200,000
Total	\$ 3,556,980	\$ 4,174,970	\$ 3,900,000	\$ 3,955,000

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 1,271,479	\$ 1,374,001		
Other Sources	\$ 255,569	\$ 321,339		
Fundraising Subtotal	\$ 1,527,048	\$ 1,695,340		

Alumni Relations

State General Fund	\$ 607,393	\$ 721,419		
Other Sources	\$ 105,801	\$ 115,634		
Alumni Relations Subtotal	\$ 713,194	\$ 837,053		

Public/Community Relations

State General Fund	\$ 913,369	\$ 1,145,348		
Other Sources	\$ 13,356	\$ 38,322		
Public/Community Relations Subtotal	\$ 926,725	\$ 1,183,670		

Administration

State General Fund	\$ 355,470	\$ 390,995		
Other Sources	\$ 34,543	\$ 67,911		
Administration Subtotal	\$ 390,013	\$ 458,906		

Fundraising Staff FTE (Professional)	8.31	9.58	10.00	10.00
--------------------------------------	------	------	-------	-------

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	6.24%	8.51%	7.16%	6.88%
Endowment Market Value as a % of State General Fund	31.34%	28.67%		
Net Return on State General Fund Fundraising Investment	460.03%	648.47%		
State General Fund Fundraising Investment as a % of State General Fund	1.11%	1.14%		
State General Fund Advancement Investment as a % of State General Fund	2.76%	3.00%	2.31%	2.11%
Total Fundraising Investment as a % of State General Fund	1.34%	1.40%		
Total Advancement Investment as a % of State General Fund	3.12%	3.45%	3.10%	3.03%

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 06/07	Actual 07/08	Goal 08/09	Goal 09/10
PERFORMANCE INDICATORS				
New Gifts	\$ 1,260,615	\$ 1,743,996		
New Pledges	\$ 181,593	\$ 143,415		
Indian and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ 900,000	\$ 310,000		
Total Gift Commitments	\$ 2,342,208	\$ 2,197,411	\$ 1,500,000	\$ 1,800,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 1,322,182	\$ 1,907,345		
Percent of Total for Current Operations	74.69%	80.31%		
Percent of Total for Endowment	8.19%	12.94%		
Percent of Total for Campus Improvements	11.77%	3.04%		
Percent of Total as Planned/Deferred	2.27%	1.60%		
Percent of Total as Unrestricted	3.08%	2.11%		
Percent of total as Loan Funds	0.00%	0.00%		
Endowment Market Value	\$ 6,730,000	\$ 6,567,000		
Endowment Distribution	\$ 380,508	\$ 284,000		
Number of Individual Donors	564	1,717	1,750	1,925
Number of Alumni Donors	160	656	721	793
Number of Addressable Alumni	55,171	50,690	55,759	61,335
Number of Annual and Life Alumni Paid Memberships	638	417	417	417

INVESTMENT INDICATORS

State General Fund **\$ 67,925,336** **\$ 71,489,966** **\$ 74,349,565** **\$ 77,323,547**

Advancement Investment - Sources of Funds

State General Fund	\$ 1,246,652	\$ 1,446,146	\$ 1,475,213	\$ 1,475,213
Other Sources	\$ -	\$ -	\$ -	\$ -
Total	\$ 1,246,652	\$ 1,446,146	\$ 1,475,213	\$ 1,475,213

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 254,725	\$ 334,638		
Other Sources	\$ -	\$ -		
Fundraising Subtotal	\$ 254,725	\$ 334,638		

Alumni Relations

State General Fund	\$ 218,743	\$ 243,318		
Other Sources	\$ -	\$ -		
Alumni Relations Subtotal	\$ 218,743	\$ 243,318		

Public/Community Relations

State General Fund	\$ 348,816	\$ 512,495		
Other Sources	\$ -	\$ -		
Public/Community Relations Subtotal	\$ 348,816	\$ 512,495		

Administration

State General Fund	\$ 424,369	\$ 355,696		
Other Sources	\$ -	\$ -		
Administration Subtotal	\$ 424,369	\$ 355,696		

Fundraising Staff FTE (Professional) 1.29 1.89 1.89 1.89

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	3.45%	3.07%	2.02%	2.33%
Endowment Market Value as a % of State General Fund	9.91%	9.19%		
Net Return on State General Fund Fundraising Investment	819.50%	556.65%		
State General Fund Fundraising Investment as a % of State General Fund	0.38%	0.47%		
State General Fund Advancement Investment as a % of State General Fund	1.84%	2.02%	1.98%	1.91%
Total Fundraising Investment as a % of State General Fund	0.38%	0.47%		
Total Advancement Investment as a % of State General Fund	1.84%	2.02%	1.98%	1.91%

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 06/07	Actual 07/08	Goal 08/09	Goal 09/10
PERFORMANCE INDICATORS				
New Gifts	\$ 4,742,301	\$ 1,220,821		
New Pledges	\$ 111,602	\$ 160,500		
Indian and Local Government Contributions	\$ 112,000	\$ 2,500		
Testamentary Commitments	\$ -	\$ 145,000		
Total Gift Commitments	\$ 4,965,903	\$ 1,528,821	\$ 4,500,000	\$ 4,100,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 6,837,285	\$ 1,584,674		
Percent of Total for Current Operations	26.66%	54.94%		
Percent of Total for Endowment	41.49%	11.39%		
Percent of Total for Campus Improvements	29.64%	21.40%		
Percent of Total as Planned/Deferred	0.00%	0.00%		
Percent of Total as Unrestricted	2.22%	12.27%		
Percent of total as Loan Funds	0.00%	0.00%		
Endowment Market Value	\$ 9,762,407	\$ 9,179,000		
Endowment Distribution	\$ 252,330	\$ 163,000		
Number of Individual Donors	2,109	2,072	1,865	1,865
Number of Alumni Donors	1,392	1,451	1,306	1,306
Number of Addressable Alumni	91,362	99,386	91,000	91,000
Number of Annual and Life Alumni Paid Memberships	2,509	3,157	2,841	2,841

INVESTMENT INDICATORS

State General Fund **\$ 85,895,030** **\$ 90,684,250** **\$ 94,311,620** **\$ 98,084,085**

Advancement Investment - Sources of Funds

State General Fund	\$ 1,633,352	\$ 2,279,727	\$ 2,280,000	\$ 1,618,800
Other Sources	\$ 179,417	\$ 351,844	\$ 350,000	\$ 248,500
Total	\$ 1,812,769	\$ 2,631,571	\$ 2,630,000	\$ 1,867,300

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 930,599	\$ 1,048,069	\$ 1,048,000	\$ 859,416
Other Sources	\$ 97,318	\$ 296,750	\$ 297,000	\$ 243,335
Fundraising Subtotal	\$ 1,027,917	\$ 1,344,819	\$ 1,345,000	\$ 1,102,751

Alumni Relations

State General Fund	\$ 342,453	\$ 612,670		
Other Sources	\$ 57,156	\$ 51,459		
Alumni Relations Subtotal	\$ 399,609	\$ 664,128		

Public/Community Relations

State General Fund	\$ 198,677	\$ 389,803		
Other Sources	\$ 4,940	\$ 3,635		
Public/Community Relations Subtotal	\$ 203,617	\$ 393,438		

Administration

State General Fund	\$ 161,623	\$ 229,186		
Other Sources	\$ 20,003	\$ -		
Administration Subtotal	\$ 181,626	\$ 229,186		

Fundraising Staff FTE (Professional) 6.45 6.02 5.80 5.30

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	5.78%	1.69%	4.77%	4.18%
Endowment Market Value as a % of State General Fund	11.37%	10.12%		
Net Return on State General Fund Fundraising Investment	433.62%	45.87%		
State General Fund Fundraising Investment as a % of State General Fund	1.08%	1.16%		
State General Fund Advancement Investment as a % of State General Fund	1.90%	2.51%	2.42%	1.65%
Total Fundraising Investment as a % of State General Fund	1.20%	1.48%		
Total Advancement Investment as a % of State General Fund	2.11%	2.90%	2.79%	1.90%

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
06/07	07/08	08/09	09/10

PERFORMANCE INDICATORS

New Gifts	\$ 10,212,143	\$ 14,552,355		
New Pledges	\$ 11,965,586	\$ 3,891,600		
Indian and Local Government Contributions	\$ 3,243,983	\$ 14,242		
Testamentary Commitments	\$ 445,000	\$ 5,386,099		
Total Gift Commitments	\$ 25,866,712	\$ 23,844,296	\$ 29,000,000	\$ 25,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 15,220,957	\$ 16,757,909		
Percent of Total for Current Operations	71.24%	50.44%		
Percent of Total for Endowment	19.04%	45.37%		
Percent of Total for Campus Improvements	8.08%	3.06%		
Percent of Total as Planned/Deferred	0.16%	0.30%		
Percent of Total as Unrestricted	1.48%	0.83%		
Percent of total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 112,847,758	\$ 104,746,000		
Endowment Distribution	\$ 5,320,846	\$ 4,217,000		

Number of Individual Donors	7,247	8,784	7,972	8,197
Number of Alumni Donors	3,402	4,109	3,742	3,295
Number of Addressable Alumni	160,113	158,347	176,124	184,868
Number of Annual and Life Alumni Paid Memberships	7,593	5,721	8,352	7,879

INVESTMENT INDICATORS

State General Fund **\$ 141,068,740** **\$ 153,752,550** **\$ 159,902,652** **\$ 166,298,758**

Advancement Investment - Sources of Funds

State General Fund	\$ 3,556,871	\$ 4,414,956	\$ 3,847,155	\$ 3,488,900
Other Sources	\$ 3,035,462	\$ 2,863,860	\$ 3,861,080	\$ 3,239,434
Total	\$ 6,592,333	\$ 7,278,816	\$ 7,708,235	\$ 6,728,334

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 1,819,916	\$ 1,985,825		
Other Sources	\$ 1,969,878	\$ 1,921,374		
Fundraising Subtotal	\$ 3,789,794	\$ 3,907,199		

Alumni Relations

State General Fund	\$ 496,699	\$ 576,930		
Other Sources	\$ 406,586	\$ 374,097		
Alumni Relations Subtotal	\$ 903,285	\$ 951,027		

Public/Community Relations

State General Fund	\$ 744,103	\$ 1,445,660		
Other Sources	\$ 162,127	\$ 137,339		
Public/Community Relations Subtotal	\$ 906,230	\$ 1,582,999		

Administration

State General Fund	\$ 496,153	\$ 693,168		
Other Sources	\$ 496,871	\$ 550,892		
Administration Subtotal	\$ 993,024	\$ 1,244,060		

Fundraising Staff FTE (Professional)	16.75	16.75	18.00	16.75
--------------------------------------	-------	-------	-------	-------

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	18.34%	15.51%	18.14%	15.03%
Endowment Market Value as a % of State General Fund	79.99%	68.13%		
Net Return on State General Fund Fundraising Investment	1321.31%	1100.72%		
State General Fund Fundraising Investment as a % of State General Fund	1.29%	1.29%		
State General Fund Advancement Investment as a % of State General Fund	2.52%	2.87%	2.41%	2.10%
Total Fundraising Investment as a % of State General Fund	2.69%	2.54%		
Total Advancement Investment as a % of State General Fund	4.67%	4.73%	4.82%	4.05%

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

GOAL MATRIX

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

Actual 06/07	Actual 07/08	Goal 08/09	Goal 09/10
-----------------	-----------------	---------------	---------------

PERFORMANCE INDICATORS

New Gifts	\$ 7,356,605	\$ 9,373,673		
New Pledges	\$ 969,322	\$ 10,391,261		
Indian and Local Government Contributions	\$ 4,000	\$ 3,250		
Testamentary Commitments	\$ 1,000,000	\$ 15,000,000		
Total Gift Commitments	\$ 9,329,927	\$ 34,768,184	\$ 20,000,000	\$ 15,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 9,940,179	\$ 11,307,959		
Percent of Total for Current Operations	49.00%	43.83%		
Percent of Total for Endowment	20.93%	24.39%		
Percent of Total for Campus Improvements	24.73%	28.65%		
Percent of Total as Planned/Deferred	3.30%	0.99%		
Percent of Total as Unrestricted	2.76%	2.14%		
Percent of total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 17,592,146	\$ 20,021,744		
Endowment Distribution	\$ 316,831	\$ 513,264		

Number of Individual Donors	7,539	7,012	8,500	8,250
Number of Alumni Donors	5,093	4,671	6,000	5,500
Number of Addressable Alumni	154,443	169,719	170,000	180,000
Number of Annual and Life Alumni Paid Memberships	5,435	6,724	6,700	6,600

INVESTMENT INDICATORS

State General Fund	\$ 160,100,530	\$ 179,133,570	\$ 186,298,913	\$ 193,750,869
---------------------------	-----------------------	-----------------------	-----------------------	-----------------------

Advancement Investment - Sources of Funds

State General Fund	\$ 6,778,984	\$ 6,064,556	\$ 7,012,342	\$ 4,902,836
Other Sources	\$ -	\$ -	\$ 171,600	\$ 200,000
Total	\$ 6,778,984	\$ 6,064,556	\$ 7,183,942	\$ 5,102,836

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 2,110,993	\$ 2,083,861		
Other Sources	\$ -	\$ -		
Fundraising Subtotal	\$ 2,110,993	\$ 2,083,861		

Alumni Relations

State General Fund	\$ 838,658	\$ 671,790		
Other Sources	\$ -	\$ -		
Alumni Relations Subtotal	\$ 838,658	\$ 671,790		

Public/Community Relations

State General Fund	\$ 2,378,950	\$ 1,748,859		
Other Sources	\$ -	\$ -		
Public/Community Relations Subtotal	\$ 2,378,950	\$ 1,748,859		

Administration

State General Fund	\$ 1,450,383	\$ 1,560,046		
Other Sources	\$ -	\$ -		
Administration Subtotal	\$ 1,450,383	\$ 1,560,046		

Fundraising Staff FTE (Professional)	15.08	16.05	18.00	15.00
--------------------------------------	-------	-------	-------	-------

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	5.83%	19.41%	10.74%	7.74%
Endowment Market Value as a % of State General Fund	10.99%	11.18%		
Net Return on State General Fund Fundraising Investment	341.97%	1568.45%		
State General Fund Fundraising Investment as a % of State General Fund	1.32%	1.16%		
State General Fund Advancement Investment as a % of State General Fund	4.23%	3.39%	3.76%	2.53%
Total Fundraising Investment as a % of State General Fund	1.32%	1.16%		
Total Advancement Investment as a % of State General Fund	4.23%	3.39%	3.86%	2.63%

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

GOAL MATRIX

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

Actual 06/07	Actual 07/08	Goal 08/09	Goal 09/10
-----------------	-----------------	---------------	---------------

PERFORMANCE INDICATORS

New Gifts	\$ 3,212,686	\$ 2,151,932		
New Pledges	\$ 1,502,046	\$ 798,701		
Indian and Local Government Contributions	\$ 1,970	\$ 7,370		
Testamentary Commitments	\$ -	\$ -		
Total Gift Commitments	\$ 4,716,702	\$ 2,958,003	\$ 4,952,537	\$ 3,105,903

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 4,829,819	\$ 3,575,941		
Percent of Total for Current Operations	80.76%	80.72%		
Percent of Total for Endowment	15.44%	11.10%		
Percent of Total for Campus Improvements	0.00%	0.00%		
Percent of Total as Planned/Deferred	0.00%	0.17%		
Percent of Total as Unrestricted	3.80%	8.02%		
Percent of total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 18,797,000	\$ 18,447,000		
Endowment Distribution	\$ 564,000	\$ 629,069		

Number of Individual Donors	7,034	7,921	7,386	8,317
Number of Alumni Donors	3,581	4,338	3,760	4,555
Number of Addressable Alumni	47,514	43,252	49,890	45,415
Number of Annual and Life Alumni Paid Memberships	3,804	3,980	3,994	4,179

INVESTMENT INDICATORS

State General Fund	\$ 71,134,997	\$ 76,430,027	\$ 79,487,228	\$ 82,666,717
---------------------------	----------------------	----------------------	----------------------	----------------------

Advancement Investment - Sources of Funds

State General Fund	\$ 819,798	\$ 981,784	\$ 698,814	\$ 1,030,873
Other Sources	\$ 199,033	\$ 195,417	\$ 127,184	\$ 205,188
Total	\$ 1,018,831	\$ 1,177,201	\$ 825,998	\$ 1,236,061

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 499,773	\$ 649,174		
Other Sources	\$ 136,822	\$ 141,179		
Fundraising Subtotal	\$ 636,595	\$ 790,353		

Alumni Relations

State General Fund	\$ 244,717	\$ 254,469		
Other Sources	\$ 62,211	\$ 54,238		
Alumni Relations Subtotal	\$ 306,928	\$ 308,707		

Public/Community Relations

State General Fund	\$ 167,957	\$ 155,309		
Other Sources	\$ -	\$ -		
Public/Community Relations Subtotal	\$ 167,957	\$ 155,309		

Administration

State General Fund	\$ 152,068	\$ 177,301		
Other Sources	\$ -	\$ -		
Administration Subtotal	\$ 152,068	\$ 177,301		

Fundraising Staff FTE (Professional)	3.53	3.18	4.00	5.00
--------------------------------------	------	------	------	------

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	6.63%	3.87%	6.23%	3.76%
Endowment Market Value as a % of State General Fund	26.42%	24.14%		
Net Return on State General Fund Fundraising Investment	843.77%	355.66%		
State General Fund Fundraising Investment as a % of State General Fund	0.70%	0.85%		
State General Fund Advancement Investment as a % of State General Fund	1.15%	1.28%	0.88%	1.25%
Total Fundraising Investment as a % of State General Fund	0.89%	1.03%		
Total Advancement Investment as a % of State General Fund	1.43%	1.54%	1.04%	1.50%

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	Actual	Goal	Goal
06/07	07/08	08/09	09/10

PERFORMANCE INDICATORS

New Gifts	\$ 13,672,529	\$ 24,375,575		
New Pledges	\$ 828,059	\$ 3,904,684		
Indian and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ 12,844,302	\$ 5,659,585		
Total Gift Commitments	\$ 27,344,890	\$ 33,939,844	\$ 34,000,000	\$ 34,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 14,848,098	\$ 26,486,900		
Percent of Total for Current Operations	64.12%	38.34%		
Percent of Total for Endowment	15.70%	7.78%		
Percent of Total for Campus Improvements	5.06%	1.56%		
Percent of Total as Planned/Deferred	7.14%	47.78%		
Percent of Total as Unrestricted	7.94%	4.54%		
Percent of total as Loan Funds	0.00%	0.00%		
Endowment Market Value	\$ 36,072,454	\$ 36,616,000		
Endowment Distribution	\$ 1,424,387	\$ 1,384,000		
Number of Individual Donors	23,672	27,764	30,000	30,000
Number of Alumni Donors	11,832	10,879	11,000	11,000
Number of Addressable Alumni	207,370	215,839	221,000	226,000
Number of Annual and Life Alumni Paid Memberships	31,630	32,778	34,000	35,300

INVESTMENT INDICATORS

State General Fund **\$ 190,215,840** **\$ 205,079,790** **\$ 213,282,982** **\$ 221,814,301**

Advancement Investment - Sources of Funds

State General Fund	\$ 6,133,231	\$ 6,930,465	\$ 7,011,990	\$ 7,011,990
Other Sources	\$ 2,149,297	\$ 1,448,943	\$ 1,448,943	\$ 1,448,943
Total	\$ 8,282,528	\$ 8,379,408	\$ 8,460,933	\$ 8,460,933

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 3,402,652	\$ 3,403,705		
Other Sources	\$ 1,483,786	\$ 866,754		
Fundraising Subtotal	\$ 4,886,438	\$ 4,270,459		

Alumni Relations

State General Fund	\$ 472,001	\$ 593,219		
Other Sources	\$ 580,142	\$ 571,009		
Alumni Relations Subtotal	\$ 1,052,143	\$ 1,164,227		

Public/Community Relations

State General Fund	\$ 1,919,325	\$ 2,197,727		
Other Sources	\$ 79,882	\$ 11,180		
Public/Community Relations Subtotal	\$ 1,999,207	\$ 2,208,907		

Administration

State General Fund	\$ 346,094	\$ 735,814		
Other Sources	\$ 6,264	\$ -		
Administration Subtotal	\$ 352,358	\$ 735,814		

Fundraising Staff FTE (Professional)	25.59	21.95	22.75	23.75
--------------------------------------	-------	-------	-------	-------

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	14.38%	16.55%	15.94%	15.33%
Endowment Market Value as a % of State General Fund	18.96%	17.85%		
Net Return on State General Fund Fundraising Investment	703.63%	897.14%		
State General Fund Fundraising Investment as a % of State General Fund	1.79%	1.66%		
State General Fund Advancement Investment as a % of State General Fund	3.22%	3.38%	3.29%	3.16%
Total Fundraising Investment as a % of State General Fund	2.57%	2.08%		
Total Advancement Investment as a % of State General Fund	4.35%	4.09%	3.97%	3.81%

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 06/07	Actual 07/08	Goal 08/09	Goal 09/10
PERFORMANCE INDICATORS				
New Gifts	\$ 4,302,717	\$ 6,195,011		
New Pledges	\$ 657,500	\$ 2,555,525		
Indian and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ 3,750,000	\$ 10,000		
Total Gift Commitments	\$ 8,710,217	\$ 8,760,536	\$ 9,000,000	\$ 9,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 5,175,203	\$ 6,857,542		
Percent of Total for Current Operations	52.74%	35.86%		
Percent of Total for Endowment	35.28%	4.80%		
Percent of Total for Campus Improvements	6.11%	52.60%		
Percent of Total as Planned/Deferred	0.19%	2.41%		
Percent of Total as Unrestricted	5.68%	4.33%		
Percent of total as Loan Funds	0.00%	0.00%		
Endowment Market Value	\$ 18,898,708	\$ 15,091,286		
Endowment Distribution	\$ 411,318	\$ 601,328		
Number of Individual Donors	4,841	4,210	4,200	4,200
Number of Alumni Donors	4,025	3,287	3,200	3,200
Number of Addressable Alumni	106,094	105,871	107,000	117,000
Number of Annual and Life Alumni Paid Memberships	7,552	8,813	8,500	9,350

INVESTMENT INDICATORS

State General Fund **\$ 121,147,044** **\$ 132,721,064** **\$ 138,029,907** **\$ 143,551,103**

Advancement Investment - Sources of Funds

State General Fund	\$ 2,507,820	\$ 2,656,658	\$ 2,646,665	\$ 2,739,676
Other Sources	\$ 558,649	\$ 548,013	\$ 672,604	\$ 353,509
Total	\$ 3,066,469	\$ 3,204,671	\$ 3,319,269	\$ 3,093,185

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 1,266,367	\$ 1,323,411		
Other Sources	\$ 156,443	\$ 117,395		
Fundraising Subtotal	\$ 1,422,810	\$ 1,440,806		

Alumni Relations

State General Fund	\$ 293,779	\$ 363,149		
Other Sources	\$ 349,075	\$ 311,123		
Alumni Relations Subtotal	\$ 642,854	\$ 674,272		

Public/Community Relations

State General Fund	\$ 524,989	\$ 465,948		
Other Sources	\$ -	\$ -		
Public/Community Relations Subtotal	\$ 524,989	\$ 465,948		

Administration

State General Fund	\$ 422,685	\$ 513,125		
Other Sources	\$ 53,131	\$ 119,495		
Administration Subtotal	\$ 475,816	\$ 632,620		

Fundraising Staff FTE (Professional) 9.12 9.71 11.00 13.05

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	7.19%	6.60%	6.52%	6.27%
Endowment Market Value as a % of State General Fund	15.60%	11.37%		
Net Return on State General Fund Fundraising Investment	587.81%	561.97%		
State General Fund Fundraising Investment as a % of State General Fund	1.05%	1.00%		
State General Fund Advancement Investment as a % of State General Fund	2.07%	2.00%	1.92%	1.91%
Total Fundraising Investment as a % of State General Fund	1.17%	1.09%		
Total Advancement Investment as a % of State General Fund	2.53%	2.41%	2.40%	2.15%

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 06/07	Actual 07/08	Goal 08/09	Goal 09/10
PERFORMANCE INDICATORS				
New Gifts	\$ 544,924	\$ 1,098,932		
New Pledges	\$ 40,000	\$ 6,000		
Indian and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ -	\$ 10,000		
Total Gift Commitments	\$ 584,924	\$ 1,114,932	\$ 715,000	\$ 900,000
Charitable Gift Receipts (Gifts and Pledge Payments)				
	\$ 555,924	\$ 1,138,932		
Percent of Total for Current Operations	35.76%	23.94%		
Percent of Total for Endowment	13.23%	14.91%		
Percent of Total for Campus Improvements	3.02%	42.14%		
Percent of Total as Planned/Deferred	0.00%	0.00%		
Percent of Total as Unrestricted	47.99%	19.00%		
Percent of total as Loan Funds	0.00%	0.00%		
Endowment Market Value	\$ 1,837,049	\$ 1,845,354		
Endowment Distribution	\$ 59,552	\$ 37,112		
Number of Individual Donors	973	615	1,150	1,000
Number of Alumni Donors	588	388	700	600
Number of Addressable Alumni	3,617	3,920	3,800	4,200
Number of Annual and Life Alumni Paid Memberships	3,617	3,920	3,800	0
INVESTMENT INDICATORS				
State General Fund	\$ 15,733,940	\$ 19,033,450	\$ 19,794,788	\$ 20,586,580
Advancement Investment - Sources of Funds				
State General Fund	\$ 498,310	\$ 794,618		
Other Sources	\$ 284,585	\$ 866,299		
Total	\$ 782,895	\$ 1,660,917	\$ -	\$ -
Advancement Investment - Uses of Funds				
Fundraising				
State General Fund	\$ 47,779	\$ 203,709		
Other Sources	\$ 78,599	\$ 245,987		
Fundraising Subtotal	\$ 126,379	\$ 449,696		
Alumni Relations				
State General Fund	\$ 198,695	\$ 104,909		
Other Sources	\$ 35,102	\$ 11,918		
Alumni Relations Subtotal	\$ 233,797	\$ 116,827		
Public/Community Relations				
State General Fund	\$ 141,838	\$ 264,436		
Other Sources	\$ 92,284	\$ 21,880		
Public/Community Relations Subtotal	\$ 234,122	\$ 286,316		
Administration				
State General Fund	\$ 109,998	\$ 132,608		
Other Sources	\$ 78,599	\$ 11,099		
Administration Subtotal	\$ 188,598	\$ 143,707		
Fundraising Staff FTE (Professional)	0.35	0.95		
COMPARISONS				
Total Philanthropic Productivity as a % of State General Fund	3.72%	5.86%	3.61%	4.37%
Endowment Market Value as a % of State General Fund	11.68%	9.70%		
Net Return on State General Fund Fundraising Investment	1124.22%	447.32%		
State General Fund Fundraising Investment as a % of State General Fund	0.30%	1.07%		
State General Fund Advancement Investment as a % of State General Fund	3.17%	4.17%	0.00%	0.00%
Total Fundraising Investment as a % of State General Fund	0.80%	2.36%		
Total Advancement Investment as a % of State General Fund	4.98%	8.73%	0.00%	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

	Actual 06/07	Actual 07/08	Goal 08/09	Goal 09/10
PERFORMANCE INDICATORS				
New Gifts	\$ 5,020,916	\$ 3,834,507		
New Pledges	\$ 344,880	\$ 1,275,919		
Indian and Local Government Contributions	\$ 154	\$ 390		
Testamentary Commitments	\$ -	\$ -		
Total Gift Commitments	\$ 5,365,950	\$ 5,110,816	\$ 4,400,000	\$ 5,600,000
Charitable Gift Receipts (Gifts and Pledge Payments)				
	\$ 7,441,514	\$ 4,598,702		
Percent of Total for Current Operations	31.83%	44.80%		
Percent of Total for Endowment	32.56%	13.78%		
Percent of Total for Campus Improvements	35.08%	40.41%		
Percent of Total as Planned/Deferred	0.00%	0.00%		
Percent of Total as Unrestricted	0.53%	1.01%		
Percent of total as Loan Funds	0.00%	0.00%		
Endowment Market Value	\$ 4,801,223	\$ 7,014,521		
Endowment Distribution	\$ 345,665	\$ 124,164		
Number of Individual Donors	5,126	4,568	5,000	5,500
Number of Alumni Donors	106	133	115	175
Number of Addressable Alumni	3,906	4,553	4,300	5,500
Number of Annual and Life Alumni Paid Memberships	1,000	1,144	1,100	1,250
INVESTMENT INDICATORS				
State General Fund	\$ 49,937,090	\$ 53,574,750	\$ 55,717,740	\$ 57,946,450
Advancement Investment - Sources of Funds				
State General Fund	\$ 2,138,906	\$ 2,105,279	\$ 2,230,981	\$ 2,119,432
Other Sources	\$ 443,833	\$ 613,802	\$ 400,000	\$ 500,000
Total	\$ 2,582,739	\$ 2,719,081	\$ 2,630,981	\$ 2,619,432
Advancement Investment - Uses of Funds				
Fundraising				
State General Fund	\$ 880,807	\$ 671,172		
Other Sources	\$ 370,706	\$ 346,609		
Fundraising Subtotal	\$ 1,251,513	\$ 1,017,781		
Alumni Relations				
State General Fund	\$ 185,400	\$ 199,107		
Other Sources	\$ 24,068	\$ 25,411		
Alumni Relations Subtotal	\$ 209,468	\$ 224,518		
Public/Community Relations				
State General Fund	\$ 552,628	\$ 897,454		
Other Sources	\$ 31,997	\$ 109,202		
Public/Community Relations Subtotal	\$ 584,625	\$ 1,006,656		
Administration				
State General Fund	\$ 520,071	\$ 337,546		
Other Sources	\$ 17,062	\$ 132,580		
Administration Subtotal	\$ 537,133	\$ 470,126		
Fundraising Staff FTE (Professional)	8.10	5.30	8.00	7.00
COMPARISONS				
Total Philanthropic Productivity as a % of State General Fund	10.75%	9.54%	7.90%	9.66%
Endowment Market Value as a % of State General Fund	9.61%	13.09%		
Net Return on State General Fund Fundraising Investment	509.21%	661.48%		
State General Fund Fundraising Investment as a % of State General Fund	1.76%	1.25%		
State General Fund Advancement Investment as a % of State General Fund	4.28%	3.93%	4.00%	3.66%
Total Fundraising Investment as a % of State General Fund	2.51%	1.90%		
Total Advancement Investment as a % of State General Fund	5.17%	5.08%	4.72%	4.52%

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

GOAL MATRIX

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

Actual	Actual	Goal	Goal
06/07	07/08	08/09	09/10

PERFORMANCE INDICATORS

New Gifts	\$ 6,801,419	\$ 10,985,603		
New Pledges	\$ 10,496,307	\$ 3,142,924		
Indian and Local Government Contributions	\$ -	\$ 2,500,000		
Testamentary Commitments	\$ 3,945,000	\$ 3,425,000		
Total Gift Commitments	\$ 21,242,726	\$ 20,053,527	\$ 19,500,000	\$ 19,500,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 8,624,980	\$ 14,136,987		
Percent of Total for Current Operations	76.54%	63.79%	35%	
Percent of Total for Endowment	20.28%	14.91%	12%	
Percent of Total for Campus Improvements	0.74%	14.95%	3%	
Percent of Total as Planned/Deferred	1.14%	5.48%	48%	
Percent of Total as Unrestricted	1.31%	0.87%	2%	
Percent of total as Loan Funds	0.00%	0.00%	0%	

Endowment Market Value	\$ 60,227,000	\$ 55,379,000		
Endowment Distribution	\$ 1,978,000	\$ 3,246,000		

Number of Individual Donors	7,040	7,385	9,000	9,000
Number of Alumni Donors	3,236	3,115	4,000	4,000
Number of Addressable Alumni	191,036	194,327	189,000	189,000
Number of Annual and Life Alumni Paid Memberships	5,341	6,512	10,000	10,000

INVESTMENT INDICATORS

State General Fund **\$ 180,010,350** **\$ 195,369,280** **\$ 194,191,936** **\$ 194,191,936**

Advancement Investment - Sources of Funds

State General Fund	\$ 4,512,420	\$ 4,981,078	\$ 4,900,000	\$ 4,419,000
Other Sources	\$ 753,713	\$ 744,000	\$ 1,000,000	\$ 700,000
Total	\$ 5,266,133	\$ 5,725,078	\$ 5,900,000	\$ 5,119,000

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 1,915,228	\$ 2,273,224		
Other Sources	\$ 64,530	\$ 129,717		
Fundraising Subtotal	\$ 1,979,758	\$ 2,402,941		

Alumni Relations

State General Fund	\$ 487,467	\$ 578,881		
Other Sources	\$ 404,772	\$ 322,989		
Alumni Relations Subtotal	\$ 892,239	\$ 901,870		

Public/Community Relations

State General Fund	\$ 1,629,196	\$ 1,629,114		
Other Sources	\$ 52,734	\$ 23,290		
Public/Community Relations Subtotal	\$ 1,681,930	\$ 1,652,404		

Administration

State General Fund	\$ 480,529	\$ 832,572		
Other Sources	\$ 214,106	\$ 6,906		
Administration Subtotal	\$ 694,635	\$ 839,478		

Fundraising Staff FTE (Professional)	14.85	16.00	18.00	18.00
--------------------------------------	-------	-------	-------	-------

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	11.80%	10.26%	10.04%	10.04%
Endowment Market Value as a % of State General Fund	33.46%	28.35%		
Net Return on State General Fund Fundraising Investment	1009.15%	782.16%		
State General Fund Fundraising Investment as a % of State General Fund	1.06%	1.16%		
State General Fund Advancement Investment as a % of State General Fund	2.51%	2.55%	2.52%	2.28%
Total Fundraising Investment as a % of State General Fund	1.10%	1.23%		
Total Advancement Investment as a % of State General Fund	2.93%	2.93%	3.04%	2.64%

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

GOAL MATRIX

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

Actual 06/07	Actual 07/08	Goal 08/09	Goal 09/10
-----------------	-----------------	---------------	---------------

PERFORMANCE INDICATORS

New Gifts	\$ 10,070,687	\$ 4,400,563		
New Pledges	\$ 891,914	\$ 695,132		
Indian and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ -	\$ 81,189		
Total Gift Commitments	\$ 10,962,601	\$ 5,176,884	\$ 17,500,000	\$ 17,500,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 10,117,890	\$ 5,537,063		
Percent of Total for Current Operations	40.04%	54.78%		
Percent of Total for Endowment	33.93%	31.21%		
Percent of Total for Campus Improvements	22.36%	6.77%		
Percent of Total as Planned/Deferred	0.00%	0.00%		
Percent of Total as Unrestricted	3.67%	7.24%		
Percent of total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 33,716,459	\$ 33,201,000		
Endowment Distribution	\$ 1,147,834	\$ 1,594,042		

Number of Individual Donors	1,409	1,493	1,537	1,613
Number of Alumni Donors	4,143	3,892	4,008	4,128
Number of Addressable Alumni	104,745	92,290	112,845	118,487
Number of Annual and Life Alumni Paid Memberships	3,218	3,220	3,347	3,447

INVESTMENT INDICATORS

State General Fund	\$ 137,339,580	\$ 146,607,350	\$ 152,471,644	\$ 158,570,510
---------------------------	-----------------------	-----------------------	-----------------------	-----------------------

Advancement Investment - Sources of Funds

State General Fund	\$ 3,498,960	\$ 3,846,145	\$ 4,002,676	\$ 4,119,639
Other Sources	\$ 467,866	\$ 647,500	\$ 1,084,500	\$ 1,095,000
Total	\$ 3,966,826	\$ 4,493,645	\$ 5,087,176	\$ 5,214,639

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 1,898,480	\$ 2,746,733		
Other Sources	\$ 179,455	\$ 350,585		
Fundraising Subtotal	\$ 2,077,935	\$ 3,097,318		

Alumni Relations

State General Fund	\$ 360,743	\$ 464,857		
Other Sources	\$ 37,842	\$ 29,454		
Alumni Relations Subtotal	\$ 398,585	\$ 494,311		

Public/Community Relations

State General Fund	\$ 615,070	\$ 908,872		
Other Sources	\$ 176,608	\$ 149,732		
Public/Community Relations Subtotal	\$ 791,678	\$ 1,058,604		

Administration

State General Fund	\$ 624,668	\$ 664,624		
Other Sources	\$ 73,961	\$ 142,312		
Administration Subtotal	\$ 698,629	\$ 806,936		

Fundraising Staff FTE (Professional)	22.75	21.90	23.00	24.50
--------------------------------------	-------	-------	-------	-------

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	7.98%	3.53%	11.48%	11.04%
Endowment Market Value as a % of State General Fund	24.55%	22.65%		
Net Return on State General Fund Fundraising Investment	477.44%	88.47%		
State General Fund Fundraising Investment as a % of State General Fund	1.38%	1.87%		
State General Fund Advancement Investment as a % of State General Fund	2.55%	2.62%	2.63%	2.60%
Total Fundraising Investment as a % of State General Fund	1.51%	2.11%		
Total Advancement Investment as a % of State General Fund	2.89%	3.07%	3.34%	3.29%

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

GOAL MATRIX

Campus Name: **SACRAMENTO**
Group Classification: **2**

Actual 06/07	Actual 07/08	Goal 08/09	Goal 09/10
-----------------	-----------------	---------------	---------------

PERFORMANCE INDICATORS

New Gifts	\$ 8,635,290	\$ 9,896,235		
New Pledges	\$ 55,000	\$ 490,178		
Indian and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ 7,555,000	\$ 7,601,356		
Total Gift Commitments	\$ 16,245,290	\$ 17,987,769	\$ 17,300,000	\$ 18,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 10,205,234	\$ 10,243,150		
Percent of Total for Current Operations	52.11%	52.52%		
Percent of Total for Endowment	17.13%	28.61%		
Percent of Total for Campus Improvements	28.75%	17.30%		
Percent of Total as Planned/Deferred	0.05%	0.00%		
Percent of Total as Unrestricted	1.97%	1.58%		
Percent of total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 20,068,853	\$ 22,287,688		
Endowment Distribution	\$ 736,000	\$ 730,531		

Number of Individual Donors	28,522	27,942	30,000	31,000
Number of Alumni Donors	3,554	3,754	3,700	3,800
Number of Addressable Alumni	164,357	165,625	168,000	175,000
Number of Annual and Life Alumni Paid Memberships	4,457	4,841	4,500	5,000

INVESTMENT INDICATORS

State General Fund **\$ 157,763,638** **\$ 165,543,608** **\$ 172,165,352** **\$ 179,051,966**

Advancement Investment - Sources of Funds

State General Fund	\$ 4,133,416	\$ 4,958,456	\$ 4,046,884	\$ 4,046,884
Other Sources	\$ 286,734	\$ 287,853	\$ 301,071	\$ 301,071
Total	\$ 4,420,150	\$ 5,246,310	\$ 4,347,954	\$ 4,347,955

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 1,703,478	\$ 1,995,441		
Other Sources	\$ -	\$ -		
Fundraising Subtotal	\$ 1,703,478	\$ 1,995,441		

Alumni Relations

State General Fund	\$ 739,933	\$ 1,034,873		
Other Sources	\$ 286,734	\$ 287,853		
Alumni Relations Subtotal	\$ 1,026,667	\$ 1,322,727		

Public/Community Relations

State General Fund	\$ 1,184,169	\$ 1,384,304		
Other Sources	\$ -	\$ -		
Public/Community Relations Subtotal	\$ 1,184,169	\$ 1,384,304		

Administration

State General Fund	\$ 505,836	\$ 543,837		
Other Sources	\$ -	\$ -		
Administration Subtotal	\$ 505,836	\$ 543,837		

Fundraising Staff FTE (Professional)	13.17	13.20	15.95	15.95
--------------------------------------	-------	-------	-------	-------

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	10.30%	10.87%	10.05%	10.05%
Endowment Market Value as a % of State General Fund	12.72%	13.46%		
Net Return on State General Fund Fundraising Investment	853.65%	801.44%		
State General Fund Fundraising Investment as a % of State General Fund	1.08%	1.21%		
State General Fund Advancement Investment as a % of State General Fund	2.62%	3.00%	2.35%	2.26%
Total Fundraising Investment as a % of State General Fund	1.08%	1.21%		
Total Advancement Investment as a % of State General Fund	2.80%	3.17%	2.53%	2.43%

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
06/07	07/08	08/09	09/10

PERFORMANCE INDICATORS

New Gifts	\$ 4,896,434	\$ 4,537,303		
New Pledges	\$ 5,185,627	\$ 2,412,627		
Indian and Local Government Contributions	\$ 512,910	\$ 404,394		
Testamentary Commitments	\$ 20,000	\$ 33,993,098		
Total Gift Commitments	\$ 10,614,971	\$ 41,347,421	\$ 10,740,026	\$ 10,740,026

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 6,985,386	\$ 8,192,199		
Percent of Total for Current Operations	81.35%	36.03%		
Percent of Total for Endowment	4.84%	40.09%		
Percent of Total for Campus Improvements	13.28%	11.60%		
Percent of Total as Planned/Deferred	0.36%	12.21%		
Percent of Total as Unrestricted	0.09%	0.08%		
Percent of total as Loan Funds	0.08%	0.00%		

Endowment Market Value	\$ 12,651,000	\$ 14,190,000		
Endowment Distribution	\$ 202,000	\$ 367,000		

Number of Individual Donors	2,305	3,128	2,398	3,200
Number of Alumni Donors	1,267	1,397	1,318	1,500
Number of Addressable Alumni	62,972	56,732	65,516	65,516
Number of Annual and Life Alumni Paid Memberships	3,276	3,306	3,505	3,716

INVESTMENT INDICATORS

State General Fund	\$ 98,104,320	\$ 107,400,260	\$ 107,400,260	\$ 107,400,260
---------------------------	----------------------	-----------------------	-----------------------	-----------------------

Advancement Investment - Sources of Funds

State General Fund	\$ 3,556,910	\$ 3,410,908	\$ 3,874,870	\$ 4,339,854
Other Sources	\$ 456,572	\$ 453,202	\$ 491,467	\$ 550,443
Total	\$ 4,013,482	\$ 3,864,110	\$ 4,366,337	\$ 4,890,297

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 1,438,997	\$ 1,474,054		
Other Sources	\$ 310,240	\$ 266,907		
Fundraising Subtotal	\$ 1,749,237	\$ 1,740,961		

Alumni Relations

State General Fund	\$ 399,092	\$ 374,146		
Other Sources	\$ 66,513	\$ 78,725		
Alumni Relations Subtotal	\$ 465,605	\$ 452,871		

Public/Community Relations

State General Fund	\$ 858,564	\$ 917,480		
Other Sources	\$ 31,996	\$ 16,056		
Public/Community Relations Subtotal	\$ 890,560	\$ 933,536		

Administration

State General Fund	\$ 860,257	\$ 645,229		
Other Sources	\$ 47,824	\$ 91,514		
Administration Subtotal	\$ 908,081	\$ 736,743		

Fundraising Staff FTE (Professional)	10.09	10.58	10.00	10.00
--------------------------------------	-------	-------	-------	-------

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	10.82%	38.50%	10.00%	10.00%
Endowment Market Value as a % of State General Fund	12.90%	13.21%		
Net Return on State General Fund Fundraising Investment	637.66%	2705.01%		
State General Fund Fundraising Investment as a % of State General Fund	1.47%	1.37%		
State General Fund Advancement Investment as a % of State General Fund	3.63%	3.18%	3.61%	4.04%
Total Fundraising Investment as a % of State General Fund	1.78%	1.62%		
Total Advancement Investment as a % of State General Fund	4.09%	3.60%	4.07%	4.55%

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
06/07	07/08	08/09	09/10

PERFORMANCE INDICATORS

New Gifts	\$ 38,301,604	\$ 57,620,081		
New Pledges	\$ 6,149,984	\$ 4,255,017		
Indian and Local Government Contributions	\$ 2,179,930	\$ 1,162,100		
Testamentary Commitments	\$ -	\$ 3,050,000		
Total Gift Commitments	\$ 46,631,518	\$ 66,087,198	\$ 50,000,000	\$ 70,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 49,618,328	\$ 65,147,988		
Percent of Total for Current Operations	76.00%	62.13%		
Percent of Total for Endowment	11.61%	29.84%		
Percent of Total for Campus Improvements	0.21%	0.02%		
Percent of Total as Planned/Deferred	12.05%	7.67%		
Percent of Total as Unrestricted	0.13%	0.34%		
Percent of total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 113,853,000	\$ 115,090,000		
Endowment Distribution	\$ 4,227,000	\$ 5,006,415		

Number of Individual Donors	65,031	63,384	61,000	60,000
Number of Alumni Donors	7,683	6,621	6,500	6,500
Number of Addressable Alumni	184,105	196,772	206,000	210,000
Number of Annual and Life Alumni Paid Memberships	9,315	8,809	9,000	9,500

INVESTMENT INDICATORS

State General Fund	\$ 206,033,230	\$ 221,339,350	\$ 230,192,924	\$ 239,400,641
---------------------------	-----------------------	-----------------------	-----------------------	-----------------------

Advancement Investment - Sources of Funds

State General Fund	\$ 7,844,011	\$ 8,946,043	\$ 8,946,041	\$ 8,600,000
Other Sources	\$ 6,516,219	\$ 7,822,959	\$ 6,900,000	\$ 6,900,000
Total	\$ 14,360,230	\$ 16,769,002	\$ 15,846,041	\$ 15,500,000

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 5,473,023	\$ 5,991,707		
Other Sources	\$ 5,782,782	\$ 6,679,162		
Fundraising Subtotal	\$ 11,255,804	\$ 12,670,868		

Alumni Relations

State General Fund	\$ 697,015	\$ 684,229		
Other Sources	\$ 600,053	\$ 737,144		
Alumni Relations Subtotal	\$ 1,297,068	\$ 1,421,373		

Public/Community Relations

State General Fund	\$ 1,223,365	\$ 1,455,840		
Other Sources	\$ 69,890	\$ 203,998		
Public/Community Relations Subtotal	\$ 1,293,254	\$ 1,659,838		

Administration

State General Fund	\$ 450,610	\$ 814,267		
Other Sources	\$ 21,501	\$ 202,654		
Administration Subtotal	\$ 472,111	\$ 1,016,921		

Fundraising Staff FTE (Professional)	24.45	53.00	45.00	48.00
--------------------------------------	-------	-------	-------	-------

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	22.63%	29.86%	21.72%	29.24%
Endowment Market Value as a % of State General Fund	55.26%	52.00%		
Net Return on State General Fund Fundraising Investment	752.02%	1002.98%		
State General Fund Fundraising Investment as a % of State General Fund	2.66%	2.71%		
State General Fund Advancement Investment as a % of State General Fund	3.81%	4.04%	3.89%	3.59%
Total Fundraising Investment as a % of State General Fund	5.46%	5.72%		
Total Advancement Investment as a % of State General Fund	6.97%	7.58%	6.88%	6.47%

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 06/07	Actual 07/08	Goal 08/09	Goal 09/10
-----------------	-----------------	---------------	---------------

PERFORMANCE INDICATORS

New Gifts	\$ 8,599,910	\$ 4,486,635		
New Pledges	\$ 3,422,867	\$ 8,618,666		
Indian and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ 2,451,659	\$ 4,431,946		
Total Gift Commitments	\$ 14,474,436	\$ 17,537,247	\$ 17,100,000	\$ 17,800,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 12,590,120	\$ 11,525,731		
Percent of Total for Current Operations	43.42%	56.59%		
Percent of Total for Endowment	54.26%	38.54%		
Percent of Total for Campus Improvements	1.42%	2.52%		
Percent of Total as Planned/Deferred	0.00%	0.00%		
Percent of Total as Unrestricted	0.90%	2.36%		
Percent of total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 41,202,000	\$ 47,179,000		
Endowment Distribution	\$ 512,630	\$ 1,033,000		

Number of Individual Donors	5,339	6,064	7,000	7,500
Number of Alumni Donors	3,560	3,806	4,750	5,000
Number of Addressable Alumni	210,700	237,714	250,000	250,000
Number of Annual and Life Alumni Paid Memberships	3,131	2,765	4,000	3,500

INVESTMENT INDICATORS

State General Fund	\$ 155,868,200	\$ 171,416,331	\$ 178,272,984	\$ 185,403,904
---------------------------	-----------------------	-----------------------	-----------------------	-----------------------

Advancement Investment - Sources of Funds

State General Fund	\$ 4,512,707	\$ 5,683,195	\$ 5,000,000	\$ 5,100,000
Other Sources	\$ 27,533	\$ 131,535	\$ 150,000	\$ 150,000
Total	\$ 4,540,240	\$ 5,814,730	\$ 5,150,000	\$ 5,250,000

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 3,066,721	\$ 3,069,851		
Other Sources	\$ 11,812	\$ 109,745		
Fundraising Subtotal	\$ 3,078,533	\$ 3,179,596		

Alumni Relations

State General Fund	\$ 576,972	\$ 594,586		
Other Sources	\$ 15,599	\$ -		
Alumni Relations Subtotal	\$ 592,571	\$ 594,586		

Public/Community Relations

State General Fund	\$ 725,969	\$ 1,249,282		
Other Sources	\$ 122	\$ -		
Public/Community Relations Subtotal	\$ 726,091	\$ 1,249,282		

Administration

State General Fund	\$ 143,045	\$ 769,476		
Other Sources	\$ -	\$ 21,790		
Administration Subtotal	\$ 143,045	\$ 791,266		

Fundraising Staff FTE (Professional)	20.53	19.89	25.00	25.00
--------------------------------------	-------	-------	-------	-------

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	9.29%	10.23%	9.59%	9.60%
Endowment Market Value as a % of State General Fund	26.43%	27.52%		
Net Return on State General Fund Fundraising Investment	371.98%	471.27%		
State General Fund Fundraising Investment as a % of State General Fund	1.97%	1.79%		
State General Fund Advancement Investment as a % of State General Fund	2.90%	3.32%	2.80%	2.75%
Total Fundraising Investment as a % of State General Fund	1.98%	1.85%		
Total Advancement Investment as a % of State General Fund	2.91%	3.39%	2.89%	2.83%

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

GOAL MATRIX

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

Actual 06/07	Actual 07/08	Goal 08/09	Goal 09/10
-----------------	-----------------	---------------	---------------

PERFORMANCE INDICATORS

New Gifts	\$ 15,702,884	\$ 14,454,674		
New Pledges	\$ 30,342,413	\$ 2,371,557		
Indian and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ 4,525,000	\$ 8,905,253		
Total Gift Commitments	\$ 50,570,297	\$ 25,731,484	\$ 20,000,000	\$ 25,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 14,010,465	\$ 20,128,175		
Percent of Total for Current Operations	72.53%	54.74%		
Percent of Total for Endowment	6.04%	43.06%		
Percent of Total for Campus Improvements	5.29%	0.00%		
Percent of Total as Planned/Deferred	0.71%	0.05%		
Percent of Total as Unrestricted	7.91%	2.15%		
Percent of total as Loan Funds	7.52%	0.00%		
Endowment Market Value	\$ 50,020,000	\$ 50,108,000		
Endowment Distribution	\$ 1,640,547	\$ 1,845,000		
Number of Individual Donors	7,294	6,332	7,800	7,800
Number of Alumni Donors	4,296	3,623	4,800	4,800
Number of Addressable Alumni	164,000	185,872	172,000	172,000
Number of Annual and Life Alumni Paid Memberships	8,785	9,894	15,000	15,000

INVESTMENT INDICATORS

State General Fund **\$ 159,756,990** **\$ 169,960,150** **\$ 176,758,556** **\$ 183,828,898**

Advancement Investment - Sources of Funds

State General Fund	\$ 5,987,915	\$ 5,576,290	\$ 5,600,000	\$ 5,600,000
Other Sources	\$ 394,444	\$ 597,000	\$ 630,000	\$ 630,000
Total	\$ 6,382,359	\$ 6,173,290	\$ 6,230,000	\$ 6,230,000

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 2,452,657	\$ 2,804,595		
Other Sources	\$ 59,953	\$ 464,430		
Fundraising Subtotal	\$ 2,512,610	\$ 3,269,025		

Alumni Relations

State General Fund	\$ 506,389	\$ 468,309		
Other Sources	\$ 46,362	\$ 85,281		
Alumni Relations Subtotal	\$ 552,750	\$ 553,590		

Public/Community Relations

State General Fund	\$ 1,069,939	\$ 1,409,578		
Other Sources	\$ 5,625	\$ 18,401		
Public/Community Relations Subtotal	\$ 1,075,564	\$ 1,427,979		

Administration

State General Fund	\$ 1,958,930	\$ 2,284,787		
Other Sources	\$ 309,917	\$ 334,652		
Administration Subtotal	\$ 2,268,847	\$ 2,619,439		

Fundraising Staff FTE (Professional) 21.65 20.35 18.00 20.00

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	31.65%	15.14%	11.31%	13.60%
Endowment Market Value as a % of State General Fund	31.31%	29.48%		
Net Return on State General Fund Fundraising Investment	1961.86%	817.48%		
State General Fund Fundraising Investment as a % of State General Fund	1.54%	1.65%		
State General Fund Advancement Investment as a % of State General Fund	3.75%	3.28%	3.17%	3.05%
Total Fundraising Investment as a % of State General Fund	1.57%	1.92%		
Total Advancement Investment as a % of State General Fund	4.00%	3.63%	3.52%	3.39%

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 06/07	Actual 07/08	Goal 08/09	Goal 09/10
-----------------	-----------------	---------------	---------------

PERFORMANCE INDICATORS

New Gifts	\$ 16,094,324	\$ 13,618,632		
New Pledges	\$ 6,722,050	\$ 4,261,141		
Indian and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ 4,951,000	\$ 76,898,916		
Total Gift Commitments	\$ 27,767,374	\$ 94,778,689	\$ 34,000,000	\$ 32,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 22,699,148	\$ 18,507,411		
Percent of Total for Current Operations	43.14%	53.97%		
Percent of Total for Endowment	12.64%	14.42%		
Percent of Total for Campus Improvements	29.06%	25.72%		
Percent of Total as Planned/Deferred	11.84%	1.56%		
Percent of Total as Unrestricted	3.32%	4.32%		
Percent of total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 181,723,000	\$ 166,179,000		
Endowment Distribution	\$ 6,097,000	\$ 6,938,091		

Number of Individual Donors	18,421	16,783	20,000	20,000
Number of Alumni Donors	9,841	8,680	10,000	10,000
Number of Addressable Alumni	128,097	135,640	130,000	130,000
Number of Annual and Life Alumni Paid Memberships	13,051	13,229	13,450	13,450

INVESTMENT INDICATORS

State General Fund	\$ 139,834,230	\$ 150,281,650	\$ 156,292,916	\$ 162,544,633
---------------------------	-----------------------	-----------------------	-----------------------	-----------------------

Advancement Investment - Sources of Funds

State General Fund	\$ 5,497,859	\$ 6,362,096	\$ 5,675,000	\$ 6,000,000
Other Sources	\$ 1,684,104	\$ 1,803,735	\$ 1,900,000	\$ 2,300,000
Total	\$ 7,181,963	\$ 8,165,831	\$ 7,575,000	\$ 8,300,000

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 2,763,337	\$ 2,882,199		
Other Sources	\$ 666,063	\$ 685,066		
Fundraising Subtotal	\$ 3,429,400	\$ 3,567,265		

Alumni Relations

State General Fund	\$ 939,843	\$ 1,296,131		
Other Sources	\$ 682,031	\$ 712,676		
Alumni Relations Subtotal	\$ 1,621,874	\$ 2,008,807		

Public/Community Relations

State General Fund	\$ 1,184,346	\$ 1,306,713		
Other Sources	\$ 291,355	\$ 365,965		
Public/Community Relations Subtotal	\$ 1,475,701	\$ 1,672,678		

Administration

State General Fund	\$ 610,333	\$ 877,053		
Other Sources	\$ 44,655	\$ 40,029		
Administration Subtotal	\$ 654,988	\$ 917,082		

Fundraising Staff FTE (Professional)	20.01	12.93	24.00	18.00
--------------------------------------	-------	-------	-------	-------

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	19.86%	63.07%	21.75%	19.69%
Endowment Market Value as a % of State General Fund	129.96%	110.58%		
Net Return on State General Fund Fundraising Investment	904.85%	3188.42%		
State General Fund Fundraising Investment as a % of State General Fund	1.98%	1.92%		
State General Fund Advancement Investment as a % of State General Fund	3.93%	4.23%	3.63%	3.69%
Total Fundraising Investment as a % of State General Fund	2.45%	2.37%		
Total Advancement Investment as a % of State General Fund	5.14%	5.43%	4.85%	5.11%

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 06/07	Actual 07/08	Goal 08/09	Goal 09/10
-----------------	-----------------	---------------	---------------

PERFORMANCE INDICATORS

New Gifts	\$ 1,741,178	\$ 2,892,410		
New Pledges	\$ 2,200,250	\$ 29,737		
Indian and Local Government Contributions	\$ -	\$ 50,490		
Testamentary Commitments	\$ -	\$ -		
Total Gift Commitments	\$ 3,941,428	\$ 2,972,637	\$ 5,000,000	\$ 5,500,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 2,212,498	\$ 4,758,078		
Percent of Total for Current Operations	86.22%	48.89%		
Percent of Total for Endowment	11.06%	28.83%		
Percent of Total for Campus Improvements	0.37%	21.15%		
Percent of Total as Planned/Deferred	0.00%	0.00%		
Percent of Total as Unrestricted	2.36%	1.13%		
Percent of total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 15,157,781	\$ 16,222,000		
Endowment Distribution	\$ 379,400	\$ 398,279		

Number of Individual Donors	979	990	1,370	1,200
Number of Alumni Donors	72	73	130	150
Number of Addressable Alumni	18,988	16,329	23,000	20,000
Number of Annual and Life Alumni Paid Memberships	854	589	1,000	1,200

INVESTMENT INDICATORS

State General Fund	\$ 58,593,110	\$ 66,746,080	\$ 69,415,923	\$ 72,192,560
---------------------------	----------------------	----------------------	----------------------	----------------------

Advancement Investment - Sources of Funds

State General Fund	\$ 1,386,961	\$ 1,842,635	\$ 1,559,629	\$ 1,900,000
Other Sources	\$ 118,545	\$ 132,563	\$ 75,000	\$ 125,000
Total	\$ 1,505,505	\$ 1,975,198	\$ 1,634,629	\$ 2,025,000

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 440,369	\$ 671,138		
Other Sources	\$ 80,698	\$ 73,587		
Fundraising Subtotal	\$ 521,067	\$ 744,725		

Alumni Relations

State General Fund	\$ 181,465	\$ 196,574		
Other Sources	\$ 36,845	\$ 54,554		
Alumni Relations Subtotal	\$ 218,310	\$ 251,128		

Public/Community Relations

State General Fund	\$ 310,139	\$ 440,010		
Other Sources	\$ 1,002	\$ -		
Public/Community Relations Subtotal	\$ 311,141	\$ 440,010		

Administration

State General Fund	\$ 454,987	\$ 534,914		
Other Sources	\$ -	\$ 4,422		
Administration Subtotal	\$ 454,987	\$ 539,336		

Fundraising Staff FTE (Professional)	6.00	4.48	7.00	7.00
--------------------------------------	------	------	------	------

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	6.73%	4.45%	7.20%	7.62%
Endowment Market Value as a % of State General Fund	25.87%	24.30%		
Net Return on State General Fund Fundraising Investment	795.03%	342.93%		
State General Fund Fundraising Investment as a % of State General Fund	0.75%	1.01%		
State General Fund Advancement Investment as a % of State General Fund	2.37%	2.76%	2.25%	2.63%
Total Fundraising Investment as a % of State General Fund	0.89%	1.12%		
Total Advancement Investment as a % of State General Fund	2.57%	2.96%	2.35%	2.80%

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

GOAL MATRIX

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

Actual 06/07	Actual 07/08	Goal 08/09	Goal 09/10
-----------------	-----------------	---------------	---------------

PERFORMANCE INDICATORS

New Gifts	\$ 5,695,613	\$ 5,882,442		
New Pledges	\$ 253,650	\$ 7,652,895		
Indian and Local Government Contributions	\$ 13,721	\$ 11,941		
Testamentary Commitments	\$ 1,500,000	\$ 60,003		
Total Gift Commitments	\$ 7,462,984	\$ 13,607,281	\$ 8,800,000	\$ 8,900,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 6,124,350	\$ 12,900,675		
Percent of Total for Current Operations	37.65%	19.72%		
Percent of Total for Endowment	5.95%	2.03%		
Percent of Total for Campus Improvements	53.99%	73.95%		
Percent of Total as Planned/Deferred	1.98%	4.18%		
Percent of Total as Unrestricted	0.43%	0.11%		
Percent of total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 37,417,460	\$ 35,601,552		
Endowment Distribution	\$ 977,345	\$ 1,195,127		

Number of Individual Donors	2,692	2,040	3,500	3,500
Number of Alumni Donors	430	369	600	600
Number of Addressable Alumni	41,827	42,319	41,000	42,000
Number of Annual and Life Alumni Paid Memberships	2,238	2,017	2,200	2,350

INVESTMENT INDICATORS

State General Fund	\$ 58,753,854	\$ 64,157,344	\$ 66,723,638	\$ 69,392,583
---------------------------	----------------------	----------------------	----------------------	----------------------

Advancement Investment - Sources of Funds

State General Fund	\$ 1,678,319	\$ 1,907,617	\$ 1,700,000	\$ 1,891,069
Other Sources	\$ 72,349	\$ 92,958	\$ 75,000	\$ 146,814
Total	\$ 1,750,668	\$ 2,000,575	\$ 1,775,000	\$ 2,037,883

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 623,229	\$ 662,957		
Other Sources	\$ 18,422	\$ 15,105		
Fundraising Subtotal	\$ 641,651	\$ 678,062		

Alumni Relations

State General Fund	\$ 170,663	\$ 121,644		
Other Sources	\$ 43,436	\$ 64,991		
Alumni Relations Subtotal	\$ 214,099	\$ 186,636		

Public/Community Relations

State General Fund	\$ 417,522	\$ 373,099		
Other Sources	\$ -	\$ -		
Public/Community Relations Subtotal	\$ 417,522	\$ 373,099		

Administration

State General Fund	\$ 466,905	\$ 749,916		
Other Sources	\$ 10,491	\$ 12,862		
Administration Subtotal	\$ 477,396	\$ 762,778		

Fundraising Staff FTE (Professional)	4.90	3.46	5.00	7.00
--------------------------------------	------	------	------	------

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	12.70%	21.21%	13.19%	12.83%
Endowment Market Value as a % of State General Fund	63.69%	55.49%		
Net Return on State General Fund Fundraising Investment	1097.47%	1952.51%		
State General Fund Fundraising Investment as a % of State General Fund	1.06%	1.03%		
State General Fund Advancement Investment as a % of State General Fund	2.86%	2.97%	2.55%	2.73%
Total Fundraising Investment as a % of State General Fund	1.09%	1.06%		
Total Advancement Investment as a % of State General Fund	2.98%	3.12%	2.66%	2.94%

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

GOAL MATRIX

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

Actual 06/07	Actual 07/08	Goal 08/09	Goal 09/10
-----------------	-----------------	---------------	---------------

PERFORMANCE INDICATORS

New Gifts	\$ 3,888,239	\$ 1,861,584		
New Pledges	\$ 32,031	\$ 849,125		
Indian and Local Government Contributions	\$ -	\$ 10,736		
Testamentary Commitments	\$ -	\$ -		
Total Gift Commitments	\$ 3,920,270	\$ 2,721,445	\$ 2,600,000	\$ 3,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 3,978,028	\$ 1,896,905		
Percent of Total for Current Operations	41.97%	81.99%		
Percent of Total for Endowment	54.51%	17.67%		
Percent of Total for Campus Improvements	3.15%	0.01%		
Percent of Total as Planned/Deferred	0.00%	0.00%		
Percent of Total as Unrestricted	0.37%	0.33%		
Percent of total as Loan Funds	0.00%	0.00%		

Endowment Market Value	\$ 11,000,000	\$ 11,084,000		
Endowment Distribution	\$ 233,000	\$ 237,000		

Number of Individual Donors	945	648	2,600	3,000
Number of Alumni Donors	518	203	2,000	1,000
Number of Addressable Alumni	37,948	38,370	43,500	45,000
Number of Annual and Life Alumni Paid Memberships	54	38,370	N/A	N/A

INVESTMENT INDICATORS

State General Fund	\$ 57,936,130	\$ 63,110,030	\$ 65,634,431	\$ 68,259,808
---------------------------	----------------------	----------------------	----------------------	----------------------

Advancement Investment - Sources of Funds

State General Fund	\$ 1,198,885	\$ 1,211,033	\$ 1,584,000	\$ 1,509,128
Other Sources	\$ 23,520	\$ 25,436	\$ 100,000	\$ 100,000
Total	\$ 1,222,405	\$ 1,236,469	\$ 1,684,000	\$ 1,609,128

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 398,322	\$ 250,573		
Other Sources	\$ 8,855	\$ 8,511		
Fundraising Subtotal	\$ 407,176	\$ 259,084		

Alumni Relations

State General Fund	\$ 87,256	\$ 92,272		
Other Sources	\$ 14,665	\$ 780		
Alumni Relations Subtotal	\$ 101,921	\$ 93,052		

Public/Community Relations

State General Fund	\$ 389,663	\$ 518,469		
Other Sources	\$ -	\$ 5,017		
Public/Community Relations Subtotal	\$ 389,663	\$ 523,486		

Administration

State General Fund	\$ 323,644	\$ 349,718		
Other Sources	\$ -	\$ 11,128		
Administration Subtotal	\$ 323,644	\$ 360,847		

Fundraising Staff FTE (Professional)	2.37	1.37	5.00	4.00
--------------------------------------	------	------	------	------

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	6.77%	4.31%	3.96%	4.39%
Endowment Market Value as a % of State General Fund	18.99%	17.56%		
Net Return on State General Fund Fundraising Investment	884.20%	986.09%		
State General Fund Fundraising Investment as a % of State General Fund	0.69%	0.40%		
State General Fund Advancement Investment as a % of State General Fund	2.07%	1.92%	2.41%	2.21%
Total Fundraising Investment as a % of State General Fund	0.70%	0.41%		
Total Advancement Investment as a % of State General Fund	2.11%	1.96%	2.57%	2.36%

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