

AGENDA

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Meeting: 2:45 p.m., Tuesday, March 16, 2010
Glenn S. Dumke Auditorium

George G. Gowgani, Chair
Peter G. Mehas, Vice Chair
Carol R. Chandler
Debra S. Farar
Kenneth Fong
Linda A. Lang
A. Robert Linscheid
Russel Statham
Glen O. Toney

Consent Item

Approval of Meeting Minutes of January 27, 2010

Discussion Items

1. Naming of an Academic Entity – San Diego State University, *Action*
2. Measuring Advancement, *Information*
3. Council for Advancement and Support of Education Awards, *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, 2010

Members Present

George G. Gowgani, Chair
Peter G. Mehas, Vice Chair
Herbert L. Carter, Chair of the Board
Carol R. Chandler
Debra S. Farar
Kenneth Fong
Linda A. Lang
A. Robert Linscheid
Charles B. Reed, Chancellor
Russel Statham
Glen O. Toney

Approval of Minutes

The minutes of November 17, 2009 were approved by consent as submitted.

Naming of an Academic Entity – California State University, Fresno

Trustee Gowgani announced that this item is a request to name an academic entity in the Kremen School of Education and Human Development at California State University, Fresno, as the Maxima A. Dandoy Center for Academic Excellence.

Vice Chancellor for University Relations and Advancement Garrett P. Ashley relayed that the naming request recognizes an \$875,000 gift from the estate of retired Fresno State professor Dr. Maxima A. Dandoy, and will be used to establish a center in her name that will support research, faculty development and leadership in the Kremen School of Education and Human Development.

President John Welty commented how gratifying it is that Dr. Dandoy, a former faculty member who served the university from 1956 through 1987, would choose to donate her entire estate, upon her death, to support the university. Dr. Welty relayed that Dr. Dandoy, who died one year ago, was a native of the Philippines who came from a family of educators. The university benefitted from her excellent contributions while she was a faculty member, and future faculty members will continue to benefit with the establishment of the Dandoy Center.

The committee recommended approval of the proposed resolution (RIA 01-10-01).

Naming of a Facility – California State University, Stanislaus

Trustee Gowgani asked Vice Chancellor Garrett Ashley to present the request to name a facility at California State University, Stanislaus, as the Ed and Bertha Fitzpatrick Arena.

Mr. Ashley relayed that the proposed naming of the existing gymnasium, currently known as the Warrior Arena, recognizes Mr. and Mrs. Ed and Bertha Fitzpatrick for their recent \$500,000 commitment to the university. Their gift will be used to support student athletic scholarships and to enhance the reputation of the Warrior athletic program.

President Hamid Shirvani noted that Mr. and Mrs. Fitzpatrick have had a longstanding relationship with the university. Mr. Fitzpatrick has served as a valuable member of the university's foundation board since 1983. He and his wife have been active supporters of the Warrior athletic program and regularly attend home basketball games. Mr. Fitzpatrick is the successful owner and president of Valley Lexus, Valley Infinity and Valley BMW in Modesto, California. As the first African American to receive ownership of a Lexus franchise, Mr. Fitzpatrick is recognized as a leader in his industry. Dr. Shirvani expressed his gratitude and appreciation to the Fitzpatricks for their generous gift, which will enhance the reputation of Warrior athletics as a national contender by augmenting scholarships and allowing the university to recruit the best and brightest student athletes with the goal of capturing conference and national championships.

The committee recommended approval of the proposed resolution (RIA 01-10-02).

2008-2009 Annual Report on External Support

Chair Gowgani stated the 2008-2009 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 asked Vice Chancellor Garrett Ashley to present the report.

Mr. Ashley congratulated the presidents, their campus teams, and donors for achieving \$366 million in gift commitments and a total of \$1.9 billion in external support for 2008-2009. He commented that during these difficult economic times, external support has become vital to the university's existence. This support is relied on to allow the CSU the flexibility to remain adaptable to workforce needs and the cultivation of creativity. He noted, however, that external support does not displace the need for government support. State support of public universities remains a priority.

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 2008-2009. She noted that CSU

endowments suffered tremendous losses last year and discretionary dollars for philanthropy have declined. The \$1.9 billion in external support represented a 16 percent increase in external support to the university over the prior year, which is attributable to the one-time infusion of \$268.5 million in federal stimulus dollars.

Although gift commitments fell 17 percent compared to last year, if you adjust the numbers to account for the extraordinary \$60 million testamentary commitment received by San Luis Obispo last year, the decline is just 4 percent. Ms. Redfearn provided a breakout of gift commitments by campus group noting that four campuses in Group 3 – San Diego, San Luis Obispo, Long Beach and Fresno – collectively accounted for nearly half of all giving to the CSU. Eleven Group 3 campuses raised more gifts this year compared to last year. Maritime, Los Angeles, Pomona and Fresno had a remarkable year with each more than doubling the prior year's performance.

Gift receipts (totaling \$260 million) declined a mere 1 percent for the CSU from 2008-2009, compared to the University of California's nearly 20 percent decline.

The source of gifts to the university was also discussed with \$72 million coming from friends (including parents) of the university, \$44 million from alumni, \$85 million from foundations, and \$46 million from corporations in 2008-2009. Other organizations gave almost \$13 million. Regarding gifts by purpose, 98 percent of all charitable gifts were designated by donors to meet specific needs. Only \$6.5 million of gifts received were unrestricted and available to be directed to the university's most pressing needs.

Endowment market value dropped by 16 percent in 2008-2009 leaving the aggregated market value of all campus and chancellor's office endowments at \$717 million. In terms of endowment performance in 2008-2009, the median investment loss for the CSU was -16.2 percent.

The committee recommended approval of the proposed resolution (RIA 01-10-03).

Trustee Gowgani adjourned the meeting.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Naming of an Academic Entity – San Diego State University

Presentation By

Garrett P. Ashley
Vice Chancellor
University Relations and Advancement

Summary

This item will consider naming the School of Hospitality and Tourism Management at San Diego State University as the L. Robert Payne School of Hospitality and Tourism Management.

This proposal, submitted by San Diego State University (SDSU), 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 Payne gift to San Diego State is \$2.4 million in a new pledge plus an additional \$1.1 million seed funding that created the Hospitality and Tourism Management Program at San Diego State eight years ago. The Payne gift to San Diego State marks only the second time in San Diego State's 11-year history that a school will be named after an individual. The funds will help the School of Hospitality and Tourism Management in perpetuity attract and retain faculty, facilitate student enrichment, secure the director's position, and supplement research.

L. Robert Payne is a committed and active partner with SDSU, as well as a philanthropic leader in the San Diego community. Mr. Payne has been a long-time volunteer leader at SDSU. In December, he concluded his two-year term as chairman and an overall nine years of service on The Campanile Foundation board. His leadership and oversight have been invaluable to the quiet phase of San Diego State's first comprehensive campaign, and he continues dedicating energy and time to the university through leading both SDSU's Campaign Cabinet and The Campanile Foundation Athletics Subcommittee.

Without the vision and support provided by Mr. Payne's gift, SDSU's School of Hospitality and Tourism Management would not have been launched nor achieved so much so quickly. The school has already established an international reputation for excellence and academic rigor. That excellence is rooted in a foundation of public/private partnership and accountability. The

Inst. Adv.
Agenda Item 1
March 16-17, 2010
Page 2 of 2

school has attracted seven other donors with gifts of \$1 million or more since the initial gift from the L. Robert and Patricia L. Payne Family Foundation. This support has allowed the school to attract talented faculty, run several notable programs for the students and the community, and provided the working capital to allow the school to operate at a level of excellence.

Recommended Action

The following resolution is recommended for approval:

RESOLVED, by the Board of Trustees of the California State University, that the School of Hospitality and Tourism Management at San Diego State University be named the L. Robert Payne School of Hospitality and Tourism Management.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Measuring Advancement

Presentation By

Lori A. Redfearn
Assistant Vice Chancellor
Advancement Services

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	2006/07	2007/08	2008/09	Three Year Average
<i>Group I</i>				
Bakersfield	19%	7%	7%	11%
Channel Islands	6%	7%	5%	6%
Dominguez Hills	3%	3%	5%	4%
East Bay	6%	2%	3%	4%
Humboldt	7%	4%	6%	6%
Los Angeles	7%	7%	20%	11%
Maritime Academy	4%	6%	21%	10%
Monterey Bay	11%	10%	10%	10%
San Bernardino	11%	38%	8%	19%
San Marcos	7%	4%	6%	6%
Stanislaus	7%	4%	4%	5%
<i>Group I Average</i>	8%	10%	9%	8%

<i>Group II</i>				
Chico	6%	9%	6%	7%
Fullerton	6%	19%	8%	11%
Northridge	12%	10%	7%	10%
Pomona	8%	4%	18%	10%
Sacramento	10%	11%	10%	10%
San Francisco	9%	10%	11%	10%
San Jose	32%	15%	11%	19%
Sonoma	13%	21%	12%	15%
<i>Group II Average</i>	12%	12%	10%	12%

<i>Group III</i>				
Fresno	18%	16%	35%	23%
Long Beach	14%	17%	16%	16%
San Diego	23%	30%	28%	27%
San Luis Obispo	20%	63%	17%	33%
<i>Group III Average</i>	19%	30%	24%	25%

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

Investments in Advancement

For 2008-09, the California State University system's net return on fundraising investment in relation to gift commitments of \$366 million was 592%. This represents almost \$6 raised for every dollar invested. The median campus net return on investment was 511%.

Stated another way, the California State University system spent 14 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.

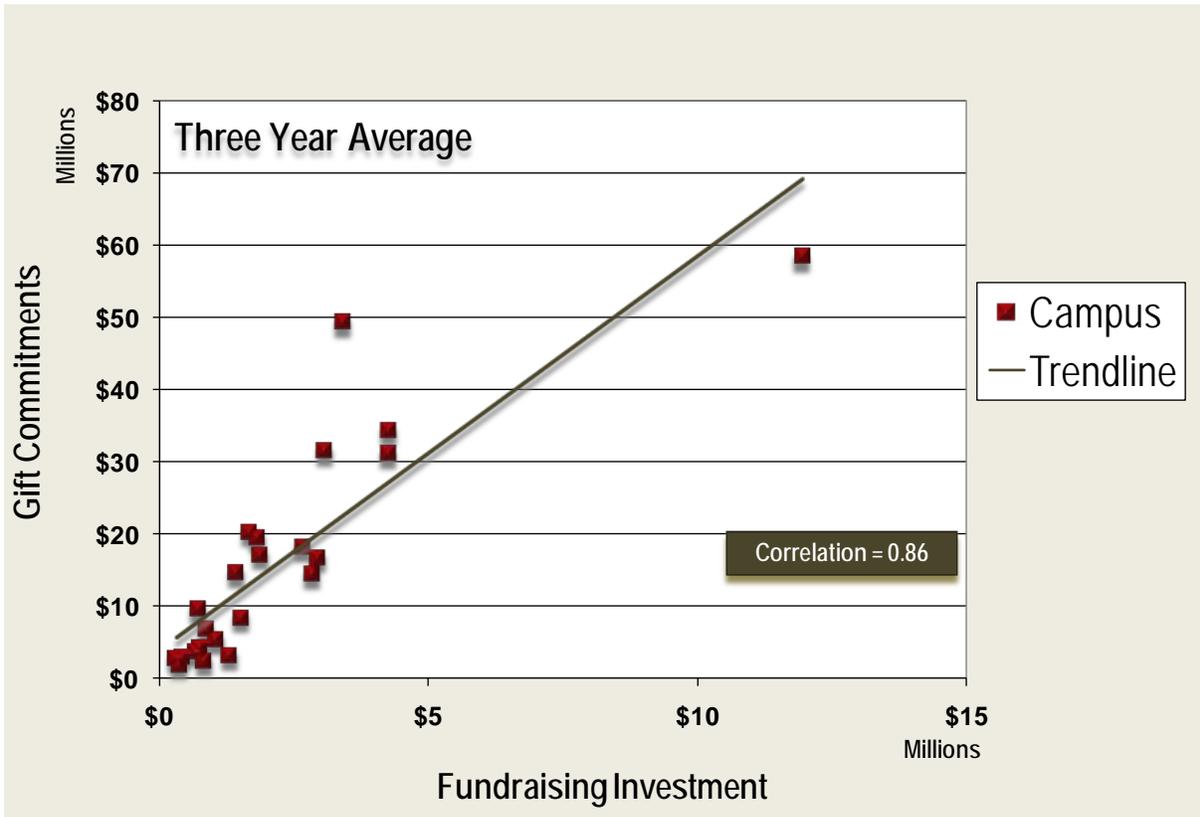
The California State University currently has 2.5 million alumni of record and invests \$6.04 per alumni for alumni relations. In 2008-09, alumni contributed \$44 million in gifts and \$1.7 million in membership dues. Campuses report revenue to invest in outreach and engagement of alumni has become more constrained as income from affinity programs has diminished.

Communication, advocacy and alumni relations efforts are following global trends by engaging in more social media and distributing more content through electronic mediums. Campuses continue to refine marketing efforts to increase university pride and enhance reputation. Many campuses are leveraging anniversaries to highlight achievements and promote opportunities for the future.

Overall, investment in Advancement remained flat in 2008-09 and is suffering the same budget impact as the rest of the university in 2009-10. Cuts to these efforts stymie the university's ability to communicate with its constituents, to maintain fundraising momentum, and to be positioned to take advantage of the economic recovery when it happens.

The chart below compares the three-year average of gift commitments compared to the three-year average of fundraising investments. With an 86 percent positive correlation between investments in fundraising and resulting gift commitments, the trendline shown is a good indicator for understanding investment is necessary to reach fundraising goals.

Dollars Invested is Significantly Related to Dollars Raised



Goal Dashboards

Each campus has submitted data indicating past performance, as well as goals for both gift commitments and investment in advancement programs. These dashboards are attached and may also be viewed at www.calstate.edu/universityadvancement/ (select Reports, then Campus Advancement Plans).

An overview of the campus university advancement goals for performance will be presented at the meeting.

University Advancement

Campus Plans

2009-10

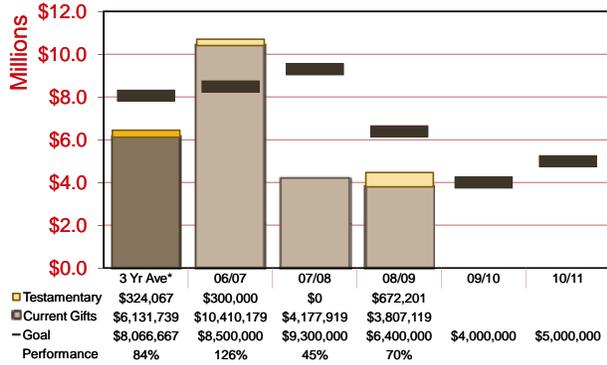
Table of Contents

<u>Campus</u>	<u>Page</u>
<u>Bakersfield</u>	1
<u>Channel Islands</u>	2
<u>Chico</u>	3
<u>Dominguez Hills</u>	4
<u>East Bay</u>	5
<u>Fresno</u>	6
<u>Fullerton</u>	7
<u>Humboldt</u>	8
<u>Long Beach</u>	9
<u>Los Angeles</u>	10
<u>Maritime Academy</u>	11
<u>Monterey Bay</u>	12
<u>Northridge</u>	13
<u>Pomona</u>	14
<u>Sacramento</u>	15
<u>San Bernardino</u>	16
<u>San Diego</u>	17
<u>San Francisco</u>	18
<u>San Jose</u>	19
<u>San Luis Obispo</u>	20
<u>San Marcos</u>	21
<u>Sonoma</u>	22
<u>Stanislaus</u>	23

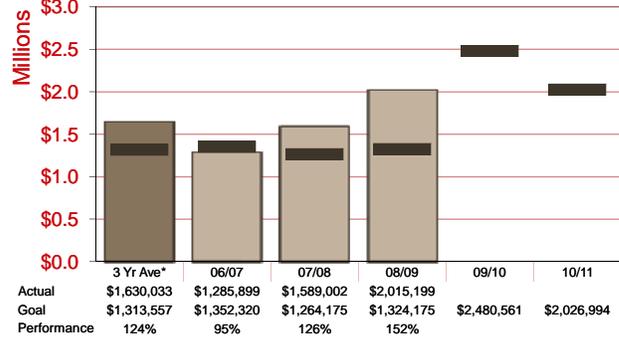
GOAL MATRIX DASHBOARD

Actual Goal

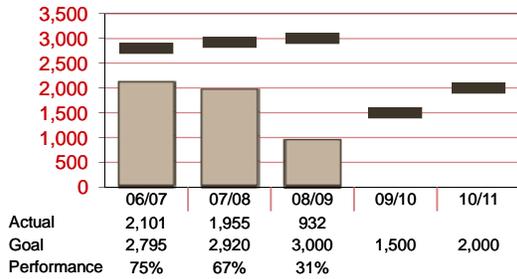
Gift Commitments



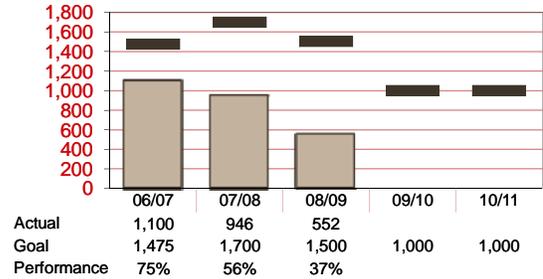
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

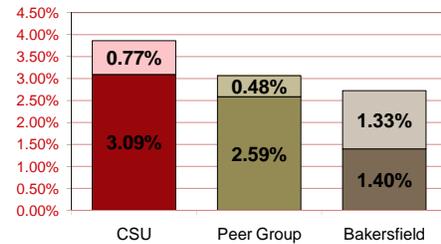
Cost Benefit Analysis

Cost to Raise a Dollar

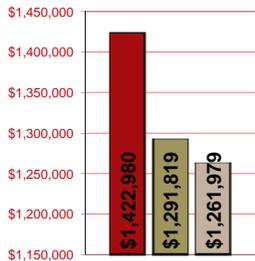


Investment as a Percentage of State General Fund

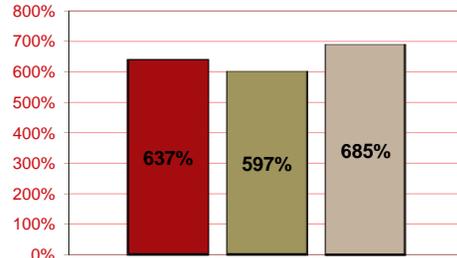
Total Advancement Expenditures



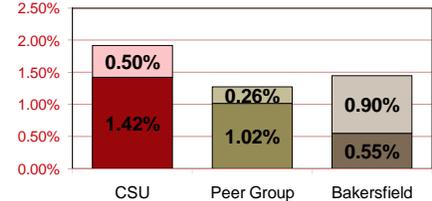
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



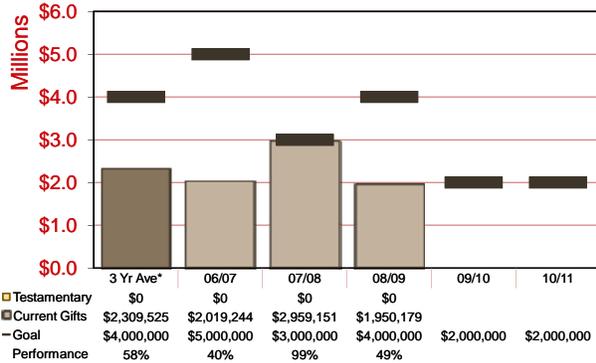
ENVIRONMENTAL SCAN / COMMENTS

The process of advancement as noted by author Kent Dove, "allows us to share the vision of a dynamic university program, engage people, put a face on the university, its programs and people, and listen to investors to match their need with university priorities." As we look at the business of advancement, bringing in the dollar is the end result of the process. During the 2008-2009 year, we used the advancement program assessment to revise our program to accomplish the "process of advancement". We made strides in building our contact with the internal and external constituency, instituted a continuous lifetime alumni involvement program, developed a strategic plan for our alumni association, increased our major donor prospect pool, and established fundraising priorities. While we continue to build a basic advancement program, the state, system, and CSUB budgets have severely impacted our ability to move forward. We are at a critical time in CSUB history and we have sharpened our case for support over the last year. We have: developed our strategic plan actions; completed our academic program scans; moved forward on our WASC accreditation; produced a comprehensive report to the NCAA as a base for our Division I move; received \$32.3 million in grants funding in this fiscal year; and key fundraising initiatives have been developed by the provost, deans and faculty members. At the same time, we are in the process of identifying key budget relieving programs. While 2008-2009 has been economically challenging for our nation, there's never been a more exciting and challenging time at CSUB!

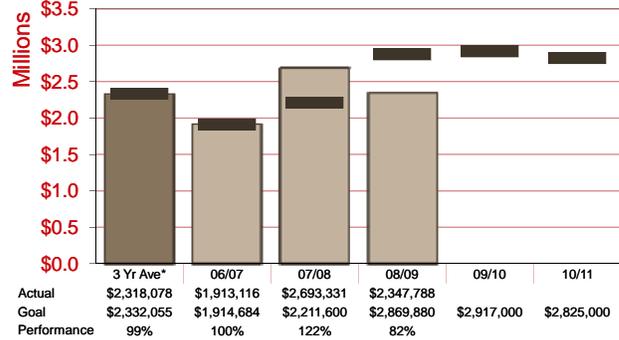
GOAL MATRIX DASHBOARD

Actual Goal

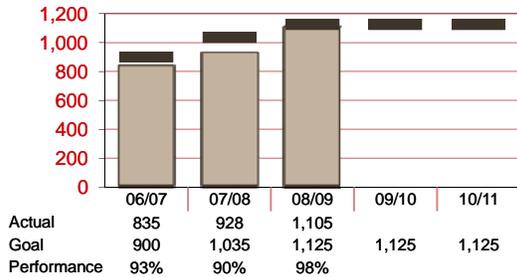
Gift Commitments



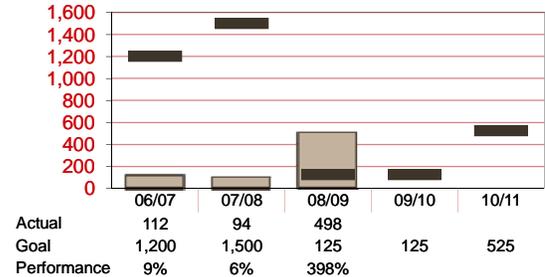
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

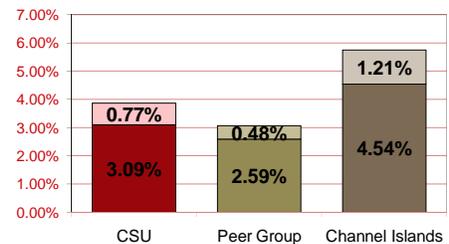
CSU Average
Peer Group Average
Channel Islands Average

Cost to Raise a Dollar

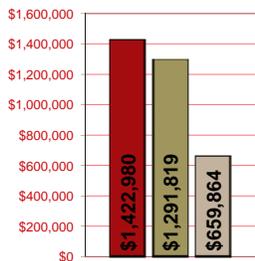


Investment as a Percentage of State General Fund

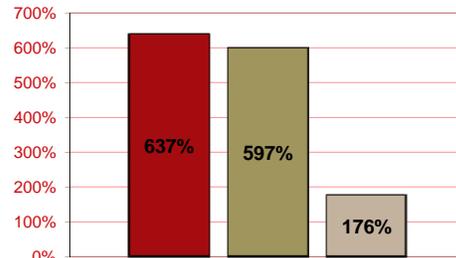
Total Advancement Expenditures



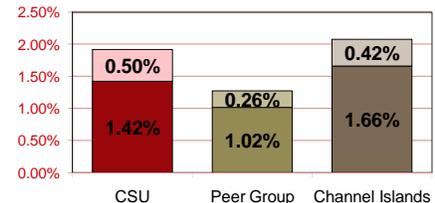
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



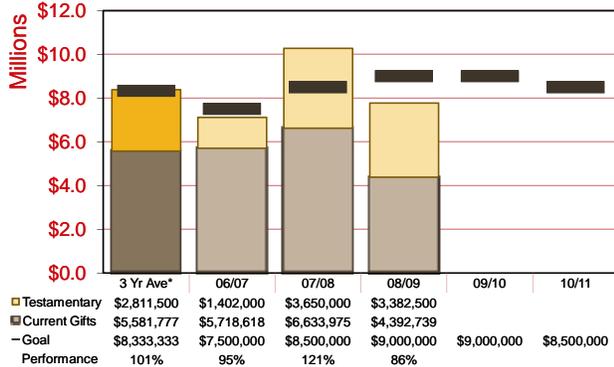
ENVIRONMENTAL SCAN / COMMENTS

The Division of University Advancement at CSU Channel Islands is organized to address the needs for consistent progress, improvement and assessment of all Advancement functions including Development, Alumni Relations, Community and Government Relations and Communication and Marketing. The second year of tenure for the VP, Julia Wilson, was one of challenge in light of the significant budget cutbacks and uncertainty. Despite those difficulties the division continued to raise the awareness, reputation and financial support of the University in new and innovative ways. The University Advancement team of thirteen professionals has not expanded in number over the past several years but is nonetheless eager to bring new energy to Advancement efforts. With only one major gift officer, it became apparent that the goal set last year was too aggressive and we only reached 50% of the intended objective. The reason is not based on lack of performance but understaffing. The goal was based on the formula of raising 1/10 of state funding. However using the benchmark that each major gift officer would raise 10X their salary, with other team members there for support of the development activities, CSU Channel Islands should have a staff of four major gift professionals. The new goals for 2009-2010 and beyond reflect this and we are trying to find innovative ways to bring more resources to the development side of the division. We are eternally optimistic that we will greatly exceed this goal.

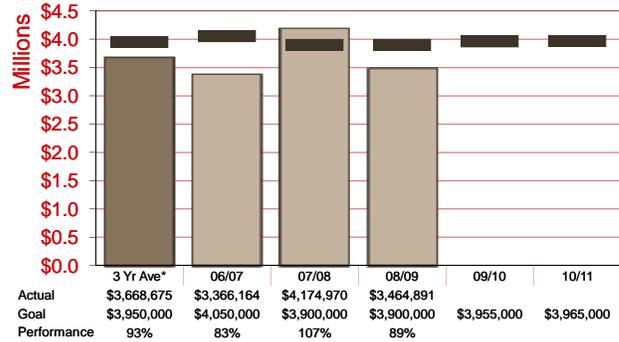
GOAL MATRIX DASHBOARD

Actual Goal

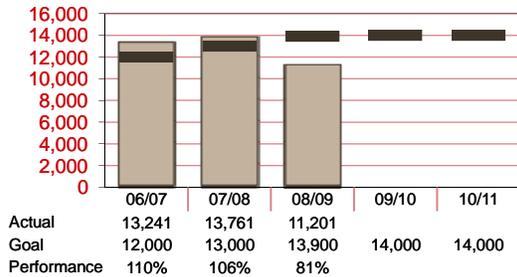
Gift Commitments



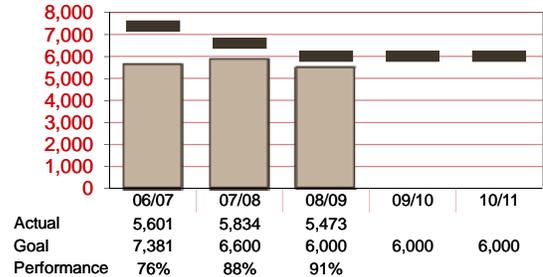
Total Advancement Investment



Number of Individual Donors



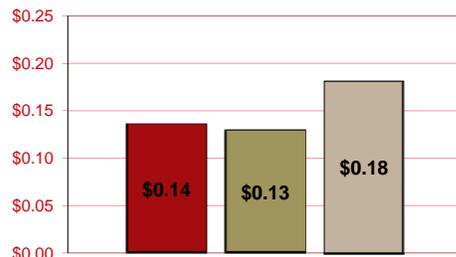
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

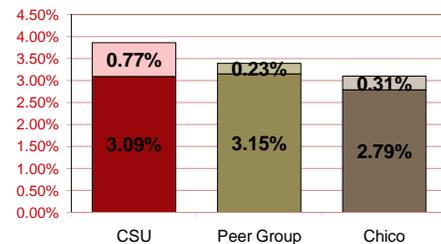
Cost Benefit Analysis

Cost to Raise a Dollar

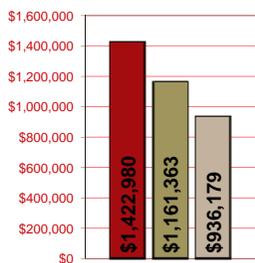


Investment as a Percentage of State General Fund

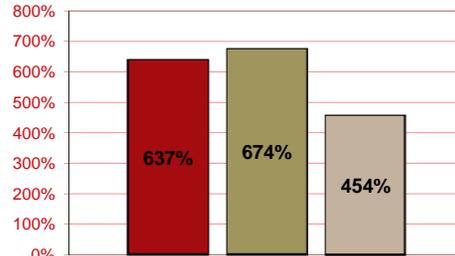
Total Advancement Expenditures



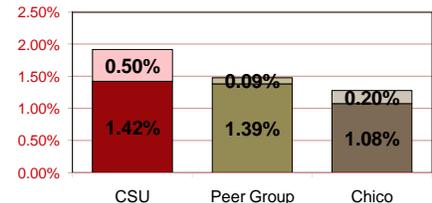
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



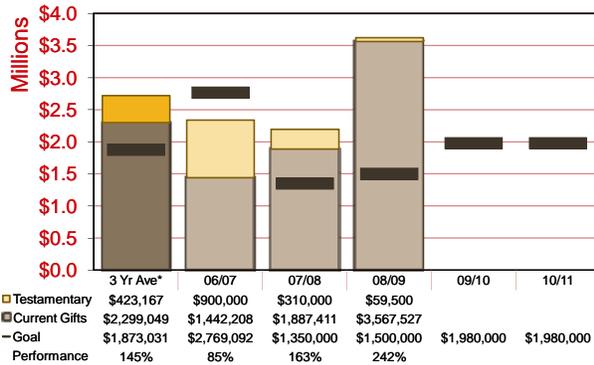
ENVIRONMENTAL SCAN / COMMENTS

Although it has been a challenging year for California's institutions of higher education, California State University, Chico has been able to maintain a stable level of philanthropic support and advocacy. This is due in great measure to the loyalty and dedication of our alumni, parents, and friends who have responded in support of the University. CSU, Chico's division of University Advancement takes pride for its role (development and public affairs) in the opening of three important teaching and public spaces on our campus—the Gateway Science Museum, the Valene L. Smith Anthropology Museum, and The Turner Gallery—all of which have received substantial, if not total, private philanthropic support. In addition, Advancement played a key role in the successful 2009 WASC accreditation review, spearheading research on the unique aspects of the "Chico Experience," a multi-faceted intellectual, cultural, and social interaction between the University, community, and region. The results of this research, initially funded by a CSU Advancement Capacity Grant and matched with University Advancement resources, will have a positive impact on Chico State far into the future. Lastly, University Advancement, working closely with the president, developed a pro-active advocacy program that promises to make a lasting and major regional impact in the years ahead.

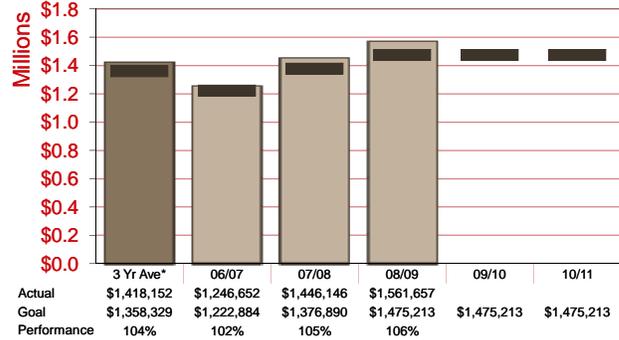
GOAL MATRIX DASHBOARD

Actual Goal

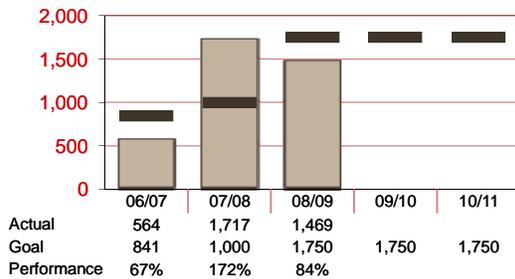
Gift Commitments



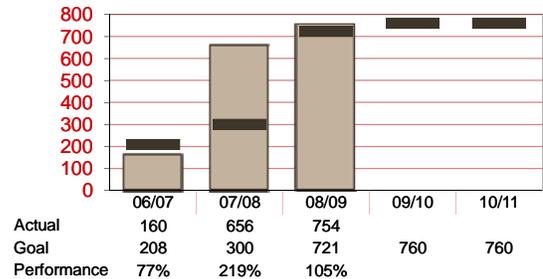
Total Advancement Investment



Number of Individual Donors



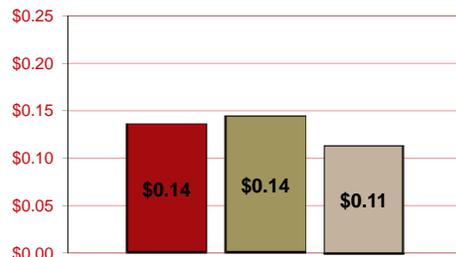
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

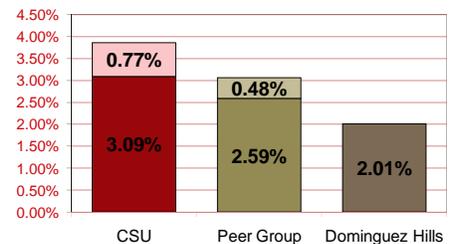
Cost Benefit Analysis

Cost to Raise a Dollar

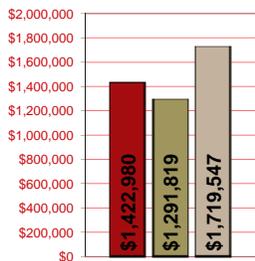


Investment as a Percentage of State General Fund

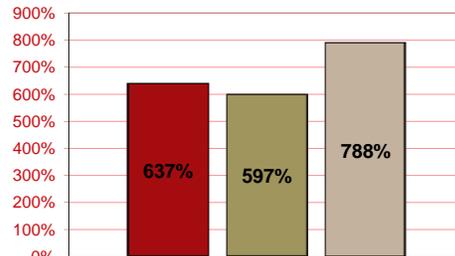
Total Advancement Expenditures



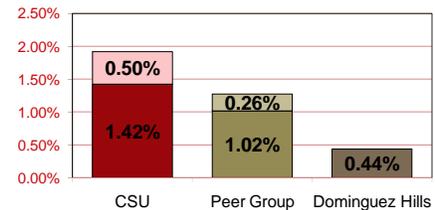
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



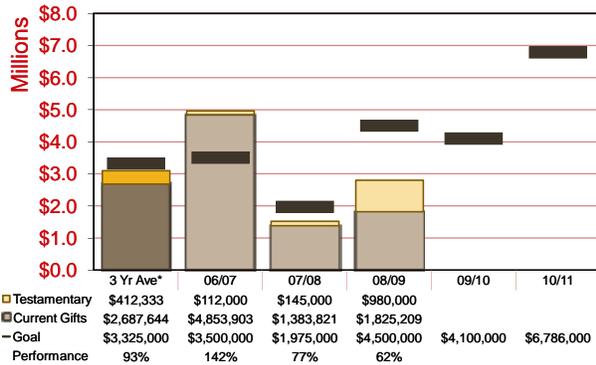
ENVIRONMENTAL SCAN / COMMENTS

University Advancement at CSU Dominguez Hills continues to enjoy a positive trend of progress that is indicated through increased philanthropic support, enhanced media placement as well as a greater recognition of the University within the greater Los Angeles and South Bay communities. Through the leadership of President Mildred García, we have been able to continue an aggressive effort to expand the reach of the campus while at the same time further develop the backend of our advancement operation, expand our services to the campus community, and present ourselves more professionally to external constituents through events and activities. While the Division of University Advancement is not immune to the difficult budget situation and economic climate, we have been able to show growth, from FY 2007-08 to FY 2008-09, in philanthropic commitments by 52%, number of media placements by almost 10%, and a community engagement strategy for our division that has resulted in over 30,000 visitors to our campus. At the same time we have maintained our active advocacy program by visiting and actively partnering with almost all our state, county and local representatives in our service area. By incorporating the goals and objectives outlined by the University's strategic plan that is in development, we expect to successfully, and strategically, expand the role of University Advancement on-campus while further growing our external presence and resources.

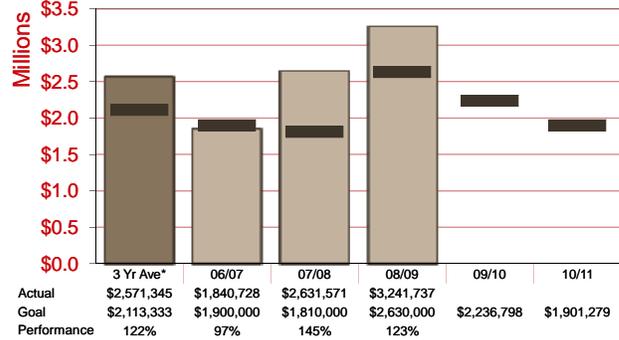
GOAL MATRIX DASHBOARD

Actual Goal

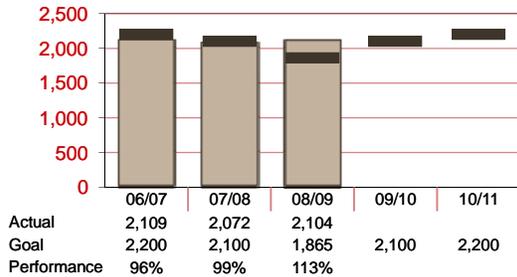
Gift Commitments



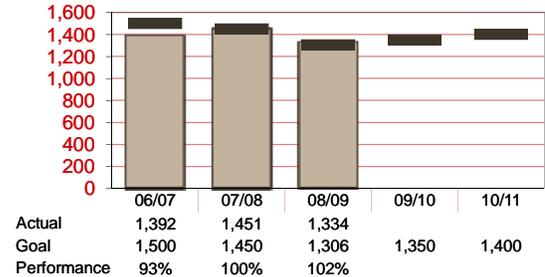
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

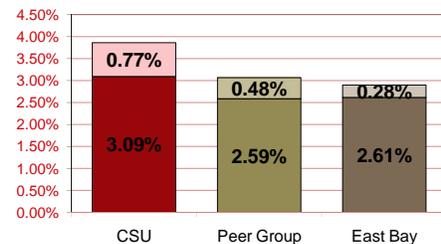
Cost Benefit Analysis

Cost to Raise a Dollar

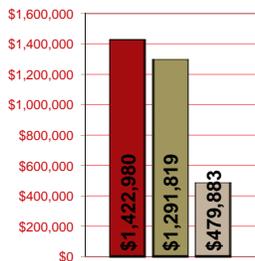


Investment as a Percentage of State General Fund

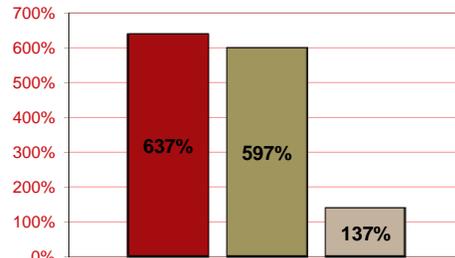
Total Advancement Expenditures



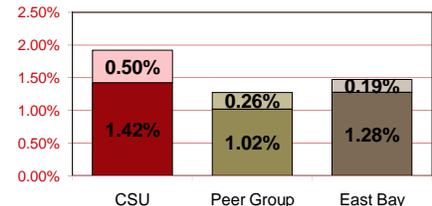
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



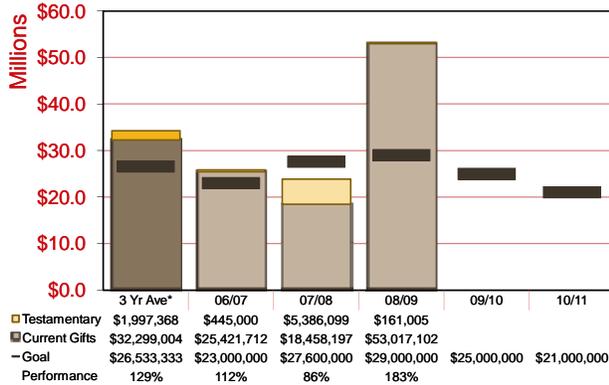
ENVIRONMENTAL SCAN / COMMENTS

During the past three years, University Advancement played a leading role in developing branding, marketing, and communications strategies, tools, and programs that not only helped attract and recruit record freshman applications and enrollment, but that also markedly increased regional awareness of the University. At the same time, however, alumni engagement and support has remained low, given the University's history as a commuter campus. A major step toward addressing this challenge was taken with the launch in July 2009 of the leadership ("quiet") phase of the University's first comprehensive campaign. Because CSUEB has positioned itself as a vital contributor to workforce development, corporations and foundations are expected to be key to the campaign's success. Fundraising results have been significantly hampered by the recession and personnel turnover. Major gift donors remain in a "wait and see; ask me later" mode. Departures of fundraising personnel created vacancies in both front-line and management positions in 2008-09. Recruitment efforts to replace and increase staff were still underway as of December 2009. Fundraising results and return on investment will be limited for the first year after hiring. To absorb reductions in State support, CSUEB took a strategic approach in allocating its expected funding — looking first to funds required to achieve its core educational mission and, second, to supporting activities including advancement. As a result, the University Advancement base budget for 2010-11 will be 41% lower than 2008-09. To partially offset this reduction, one-time funds will be allocated annually for incremental campaign costs.

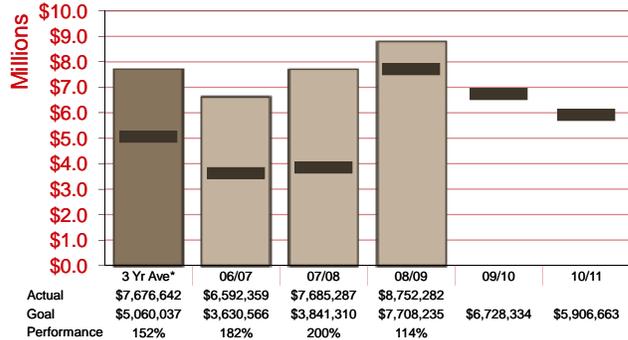
GOAL MATRIX DASHBOARD

Actual Goal

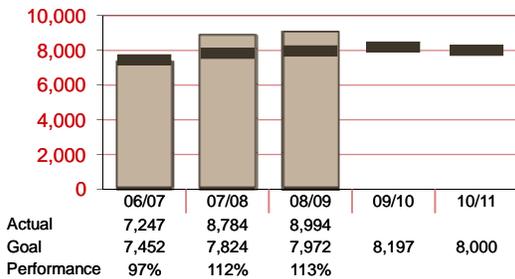
Gift Commitments



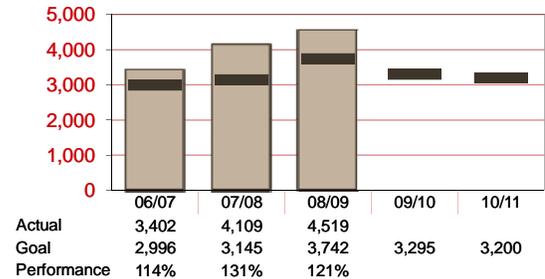
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

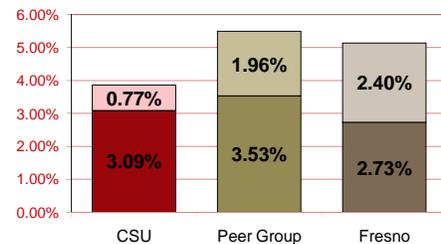


Cost to Raise a Dollar

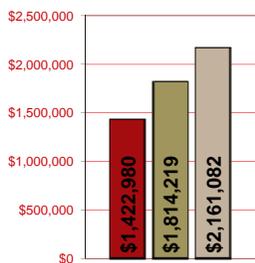


Investment as a Percentage of State General Fund

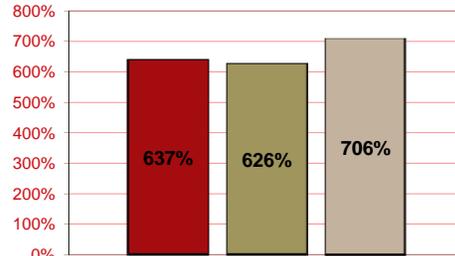
Total Advancement Expenditures



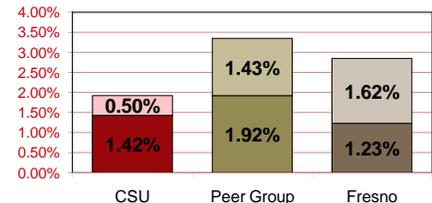
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



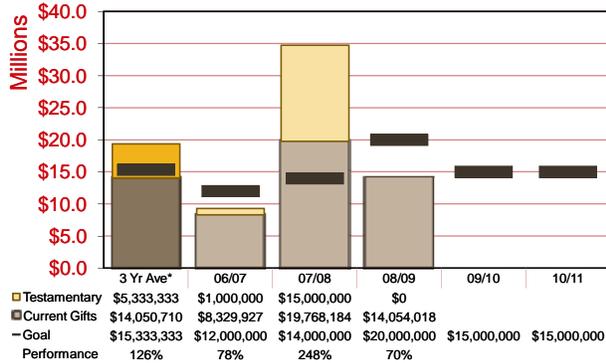
ENVIRONMENTAL SCAN / COMMENTS

This past year seems to call for a Charles Dickens opening: "It was the best of times, it was the worst of times..." In the midst of the worst recession since the Great Depression, we launched our first-ever comprehensive campaign. The quiet phase goal of \$100 million was surpassed, and the campaign went public in May 2009 with \$132 in commitments toward a public goal of \$200 million. Our founding co-chairs "retired", and we recruited two alumni as their replacements. They hit the ground running. We are rejoicing at the successes of our volunteers and staff. However, Dickens "worst of times" clouds are reversing long-term gains in Fresno State's Advancement operation as budget downturns have significantly reduced state and non-state support to Advancement. The workforce has been reduced by more than 25%. Our environmental scan can hardly ignore the long-term negative impacts on the university's ability to sustain its private fundraising efforts.

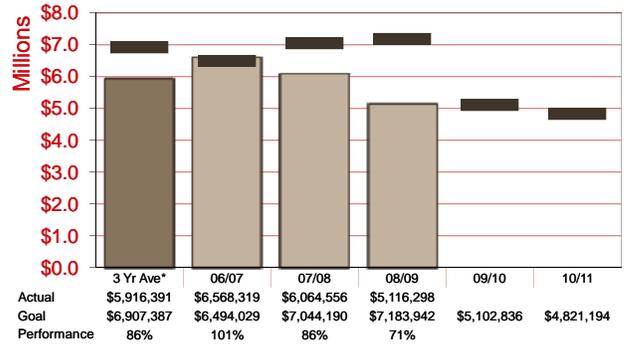
GOAL MATRIX DASHBOARD

Actual Goal

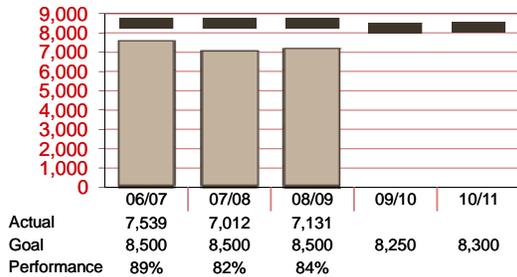
Gift Commitments



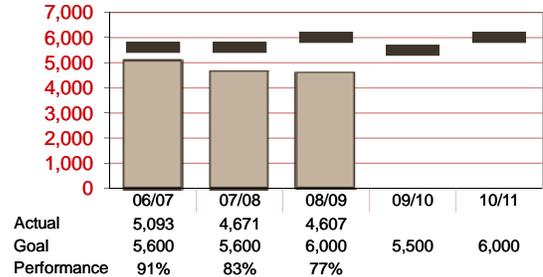
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors

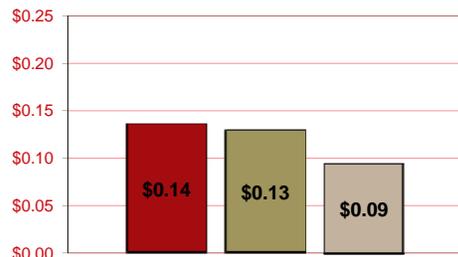


MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

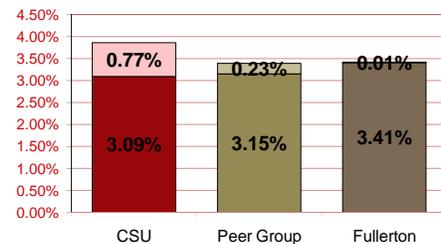
Cost to Raise a Dollar

CSU Average
Peer Group Average
Fullerton Average

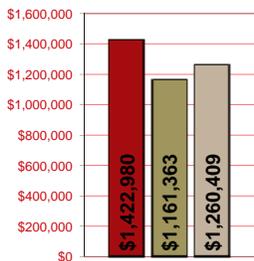


Investment as a Percentage of State General Fund

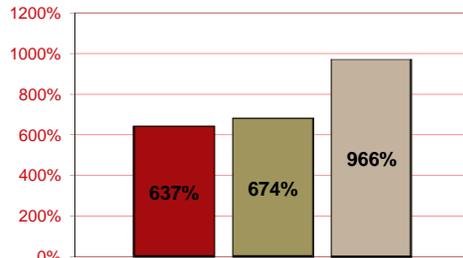
Total Advancement Expenditures



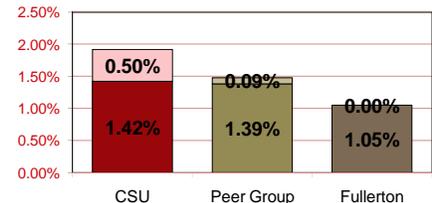
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



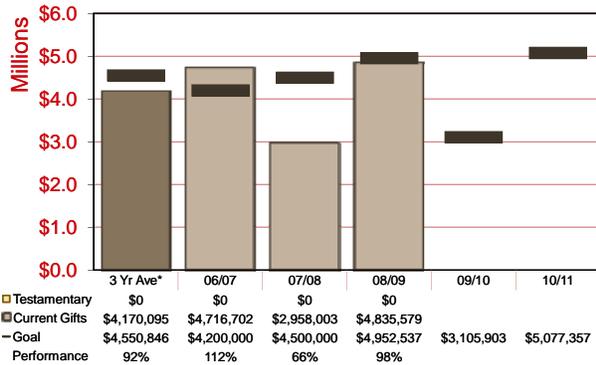
ENVIRONMENTAL SCAN / COMMENTS

The 09-10 fiscal year ushered in what was universally recognized as a continuation of one of the most challenging fundraising environments ever encountered. CSUF, in light of the external economic environment and the conclusion of its most recent campaign, established an 09-10 fundraising goal of \$9.4-million – lower than the prior year. An appropriate 10-11 goal will be established in late spring.

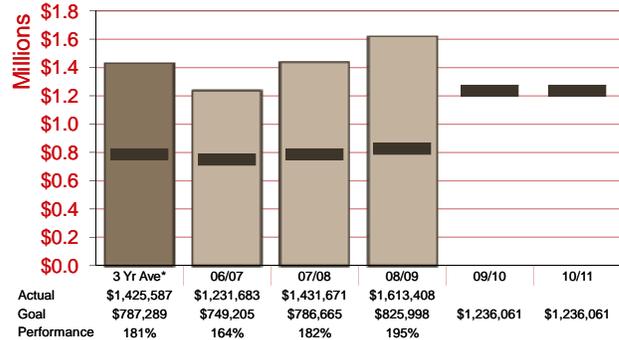
GOAL MATRIX DASHBOARD

Actual Goal

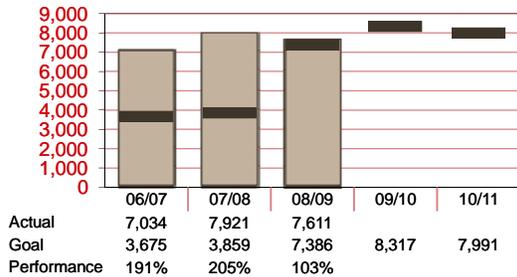
Gift Commitments



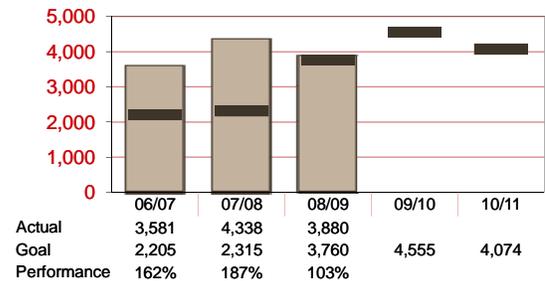
Total Advancement Investment



Number of Individual Donors



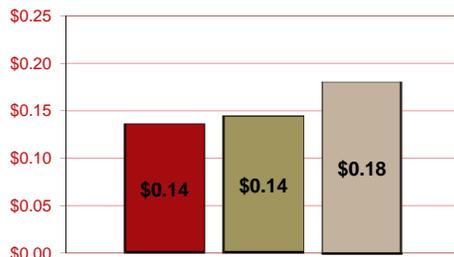
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

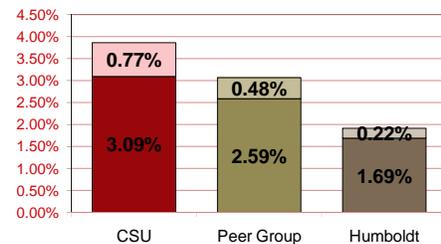
Cost Benefit Analysis

Cost to Raise a Dollar

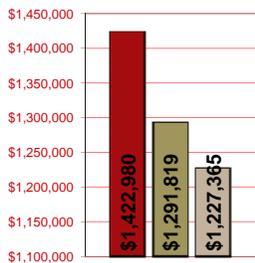


Investment as a Percentage of State General Fund

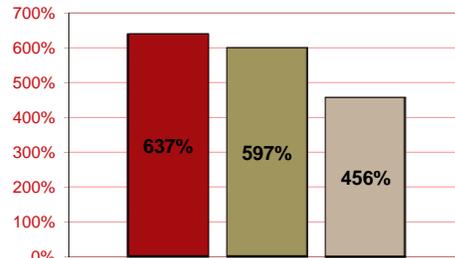
Total Advancement Expenditures



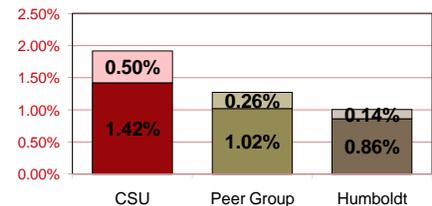
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



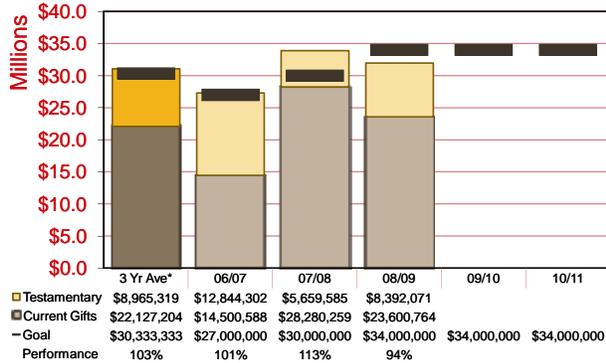
ENVIRONMENTAL SCAN / COMMENTS

In many ways Humboldt State University is flourishing under the leadership of President Rollin Richmond. There are new buildings, widespread improvements to the campus physical plant, increased demand among prospective students, increased presence and service to the local region, increased diversity of the student body, record levels of research and grant activity, and many more examples of progress that is making a difference in the lives of our students. The President has also helped bring about significant improvements to the fundraising, alumni relations, marketing and other external relations efforts. The on-going improvement in Advancement has not been without challenges. The economic recession is giving pause to many donors. Significant budget reductions hamper momentum, and an unusually high and persistent level of contentiousness on campus over a variety of issues continues to distract attention from positive university building efforts. But the work of advancing HSU is a long term project that is being tenaciously pursued regardless of the environment. Listed below are updates on three of the many goals of the Advancement Division at HSU. It is important to note that the improvements listed below have come about in spite of an overall net reduction in general fund support for the Advancement Division.

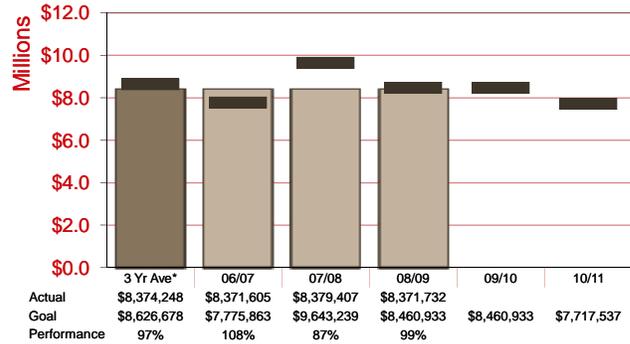
GOAL MATRIX DASHBOARD

Actual Goal

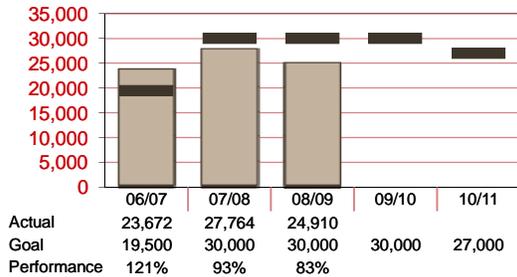
Gift Commitments



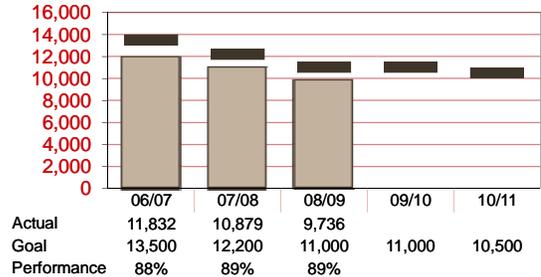
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

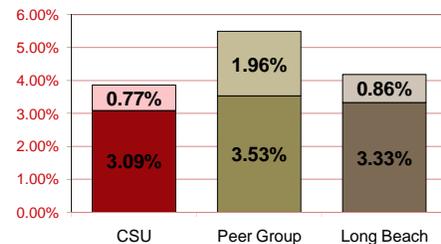
Cost Benefit Analysis

Cost to Raise a Dollar

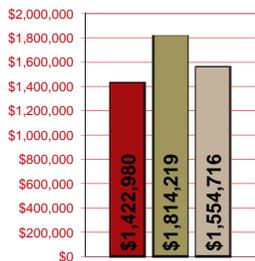


Investment as a Percentage of State General Fund

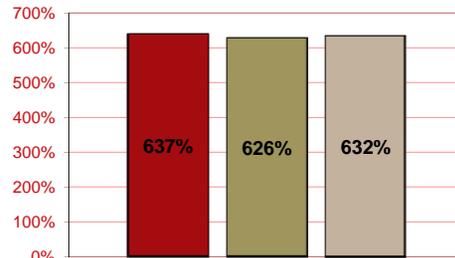
Total Advancement Expenditures



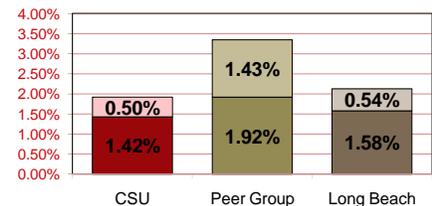
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



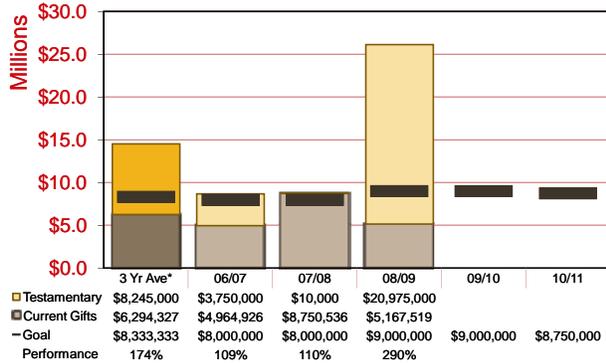
ENVIRONMENTAL SCAN / COMMENTS

Despite economic conditions, California State University, Long Beach raised nearly \$32 million in 2008-2009, the second highest total in the university's history. Since President F. King Alexander arrived, CSULB's fundraising has increased by more than 68 percent. More than \$10 million was contributed for scholarships that benefit business students and student athletes. Athletics raised more than \$8.5 million, making 2008-2009 the program's most successful year for fundraising. In recognition of its "Overall Performance" in fundraising, CSULB was honored with a prestigious 2009 CASE-WealthEngine Award for Educational Fundraising. CSULB was one of just six universities across the nation in the Public Comprehensive Institutions category to receive the accolade. Of the more than 900 institutions of higher education eligible for this award, only 39 four-year colleges or universities received recognition for Overall Performance. CSULB's first comprehensive campaign began in July 2007, with a working goal of \$250 million. At the end of fiscal year 2008-2009, the university had raised \$65.9 million, and by December 31 the campaign total is projected to jump to \$80.2 million. In addition to its fundraising successes, CSULB is becoming a prominent, model institution of public higher education. President Alexander is often summoned to testify before Congress and meet with national, state and local leaders to discuss and make policy suggestions for public higher education.

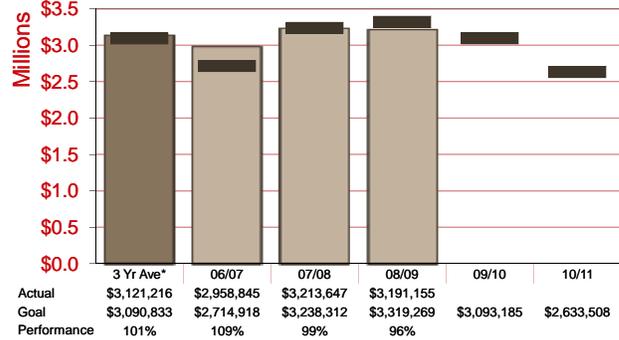
GOAL MATRIX DASHBOARD

Actual Goal

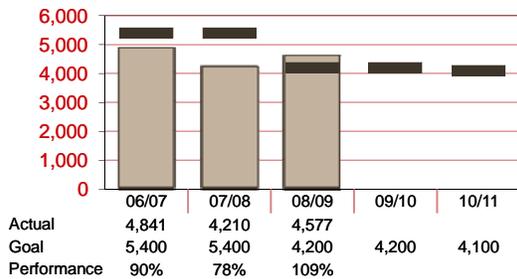
Gift Commitments



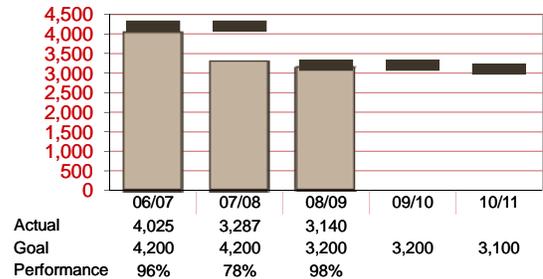
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

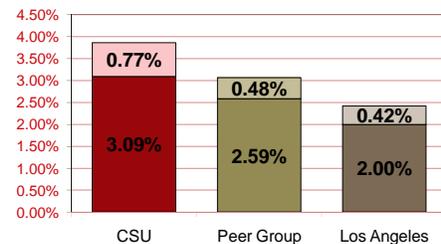
Cost Benefit Analysis

Cost to Raise a Dollar

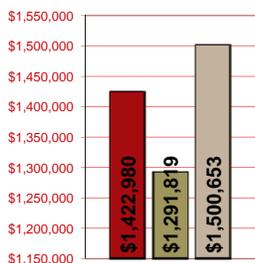


Investment as a Percentage of State General Fund

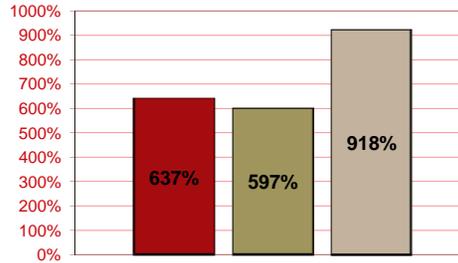
Total Advancement Expenditures



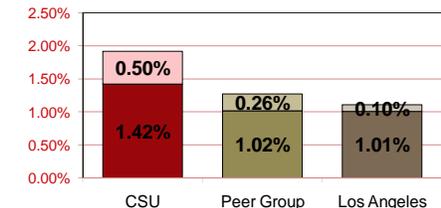
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



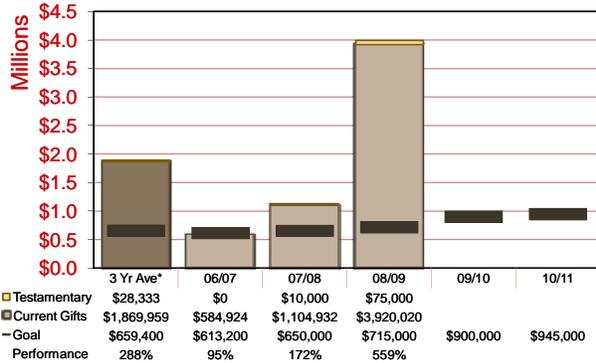
ENVIRONMENTAL SCAN / COMMENTS

The University's Advancement Plan is an outgrowth of a comprehensive strategic planning process that takes into consideration opportunities to strengthen the University's efforts through private funding and public advocacy. This plan employs strategies to help the University advance even in the face of the dramatic economic downturn in the nation and the state of California. Campus-wide development initiatives include the continuation of the capital and infrastructure initiatives begun in previous years, and the development of student aid and endowment resources with an emphasis on developing student aid, endowment and deferred gifts. A theme of "quality self-service" has emerged across all Institutional Advancement offices as a way to help mitigate the current fiscal climate. Several new staff members were hired this year in the Office of University Development, to complement the reassignment of existing staff in the previous year and help accomplish the reorganization to a more centralized model. Depending on budget realities for the upcoming and succeeding years, a broader reorganization of Institutional Advancement may be required to achieve program and financial goals with fewer financial and human resources. Last year, the Office of Public Affairs underwent several significant transitions simultaneously – reorganizing its staff, modernizing its communications methodologies and technologies, and broadening its set of responsibilities. To attract the interest and involvement of the University's diverse and changing alumni and students, the Alumni Association grew the Alumni Mentoring Program, increased the reach and efficiency of the professional and social online networking sites (LinkedIn and Facebook), while expanding volunteer mobilization, student leadership, and advocacy efforts. For 2009-10, the main goals identified in last year's plan will continue to be priorities.

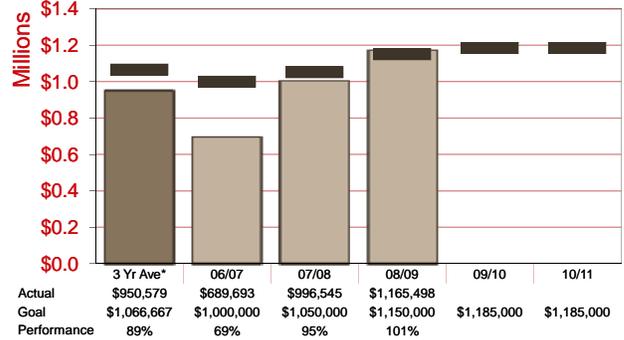
GOAL MATRIX DASHBOARD

Actual Goal

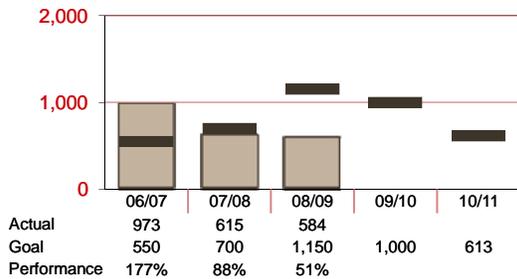
Gift Commitments



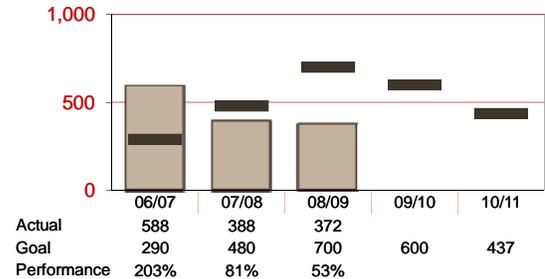
Total Advancement Investment



Number of Individual Donors



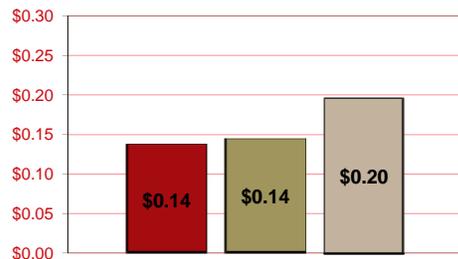
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

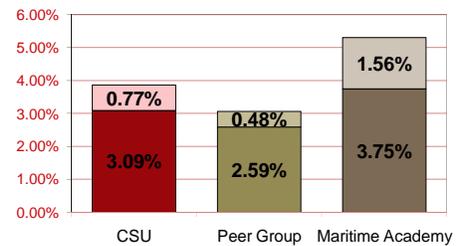
Cost Benefit Analysis

Cost to Raise a Dollar

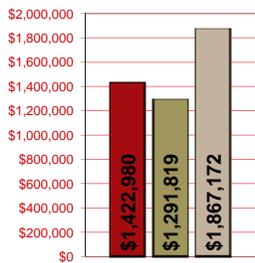


Investment as a Percentage of State General Fund

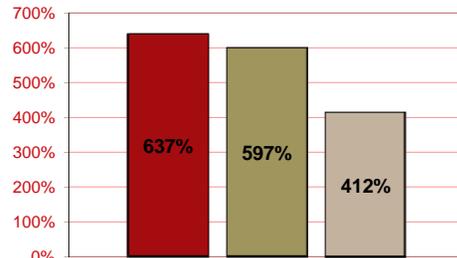
Total Advancement Expenditures



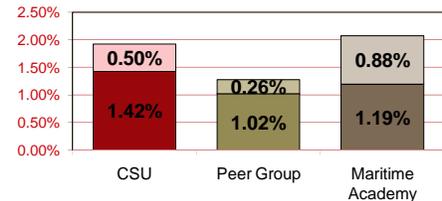
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



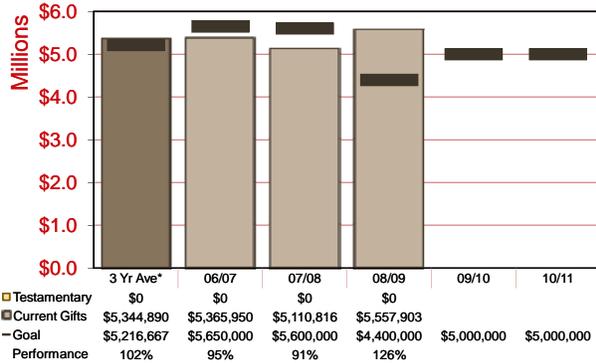
ENVIRONMENTAL SCAN / COMMENTS

The Advancement Plan for the Academy for this year is focused on recruiting high level new board members for the CMA Foundation and with their clout, finding the funding for the major capital projects we have identified in our Case for Support. In addition, we intend to continue to grow the revenues for our two primary fund raising events. Working closely with the CMA Alumni Association we intend to continue encouraging reunion class giving and dramatically shrink the number of alumni for whom we have no contact information. Finally, we intend to expand the number of annual donors of \$1000 and more, especially to our President's Fund.

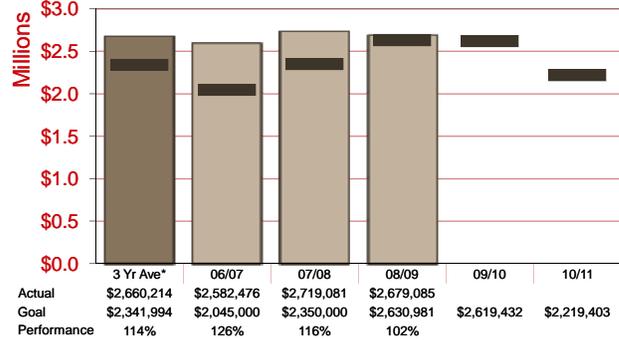
GOAL MATRIX DASHBOARD

Actual Goal

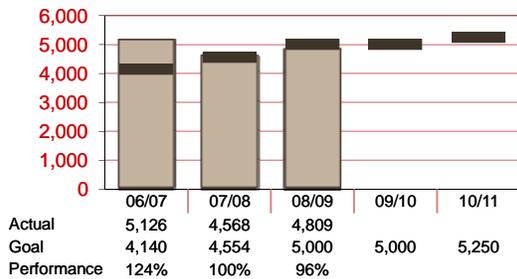
Gift Commitments



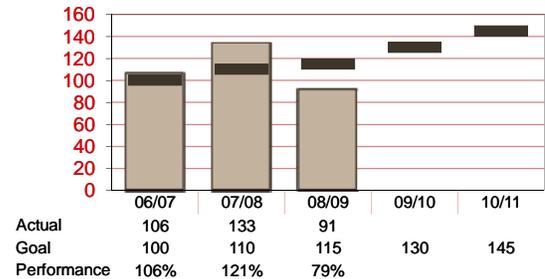
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

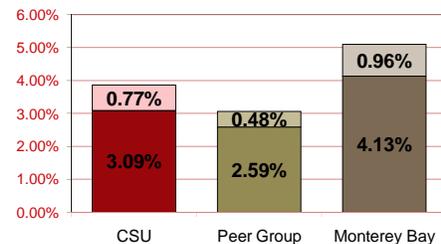
Cost Benefit Analysis

Cost to Raise a Dollar

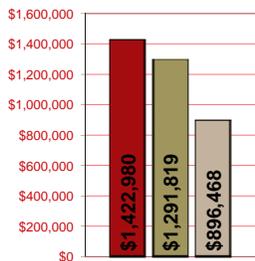


Investment as a Percentage of State General Fund

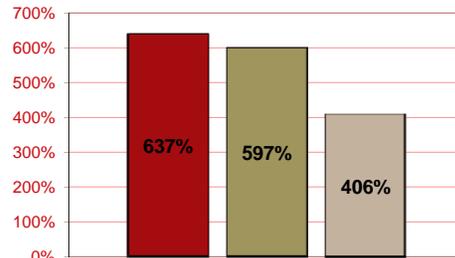
Total Advancement Expenditures



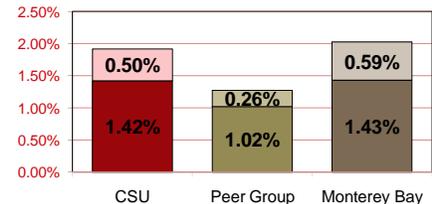
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



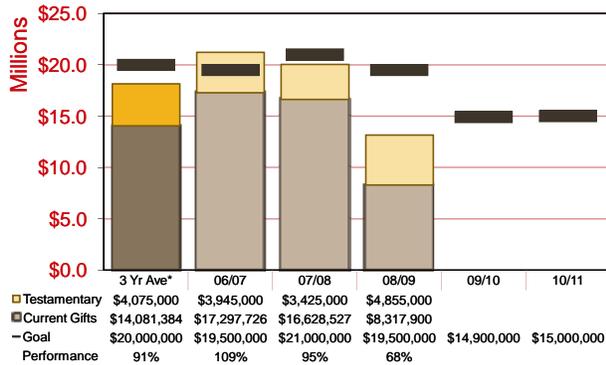
ENVIRONMENTAL SCAN / COMMENTS

Through 2008-09 and into 2009-10, there seem to be more challenges than opportunities. Budget impacts on advancement operations are compounded by the financial woes of our usual sources of private support. CSU Monterey Bay Advancement is working hard during this period to continue cultivation of our longtime friends and bring new friends into university life, albeit with reduced operating funds. When we emerge from this economic downturn, we want to have cultivated strong relationships with all of our donors so we can share in reaping the rewards of a recovering community. Our biggest challenges are in the area of major gifts. Because we are still a very young institution, individual major gifts come from non-alumni community members with whom we must build close relationships rather than from faithful alumni. Programs such as the Annual Donor Appreciation Dinner, the President's Circle, donor recognition throughout our media, and others are aimed at continuing stewardship and inclusion.

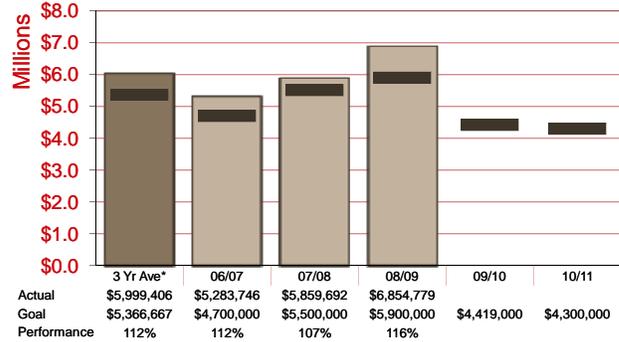
GOAL MATRIX DASHBOARD

Actual Goal

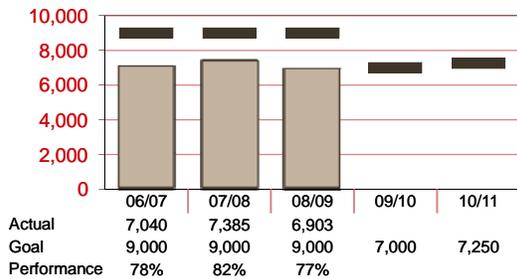
Gift Commitments



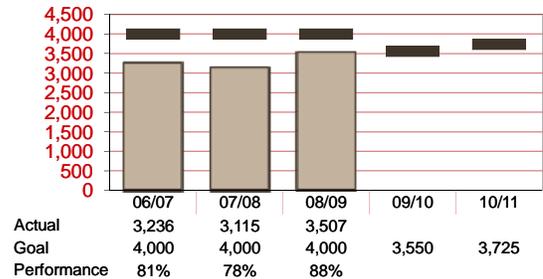
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors

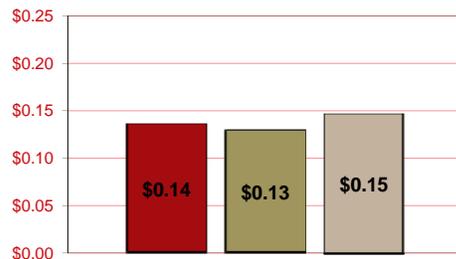


MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

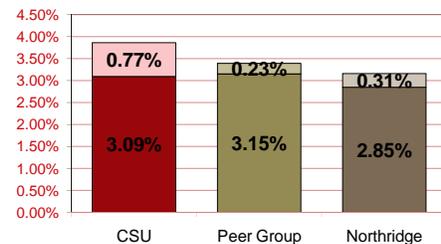
CSU Average
Peer Group Average
Northridge Average

Cost to Raise a Dollar

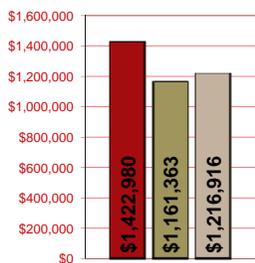


Investment as a Percentage of State General Fund

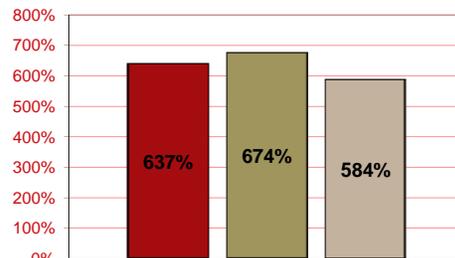
Total Advancement Expenditures



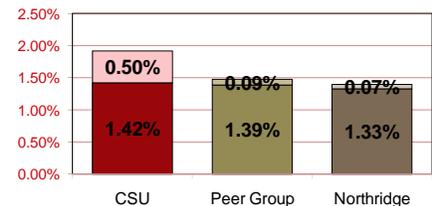
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



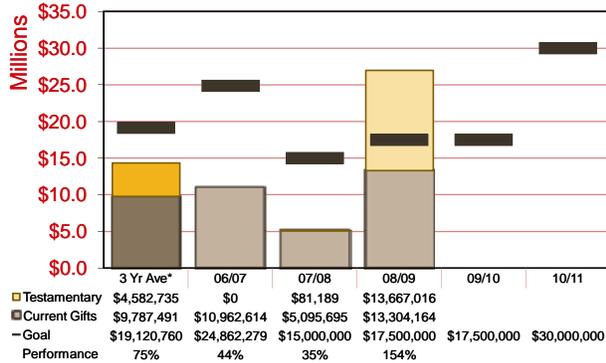
ENVIRONMENTAL SCAN / COMMENTS

Global and regional economic conditions of the past 18 months negatively impacted fundraising productivity at Cal State University, Northridge in FY09, which experienced a decline of \$7 million compared to FY08. The inability to replace a single \$5 million gift accounted for most of the year-to-year variance, but the negative climate for fundraising impacted overall results in general, a trend that has continued in FY10. Mandatory furloughs and anticipated staff reductions in late FY10 and/or FY11 due to systemwide budget cuts threaten to suppress fundraising capacity even if economic activity improves and the philanthropic context brightens. Program activity has continued to emphasize increased communications with alumni, friends, volunteers, donors and prospects to counter negative forces. This includes a combination of face-to-face, written, and electronic formats, with increased emphasis on the latter due to lower delivery cost. Efforts also have been made to sharpen awareness of the decline in state appropriations within the case for giving, pointing out that state funding at Northridge fell to 38% of consolidated operations in FY09-10. Strategies designed to further strengthen annual giving, expand volunteer involvement, increase the use of video and social networking, upgrade efforts to attract deferred gifts, and improve the brand clarity and functionality of the University's website are continuing.

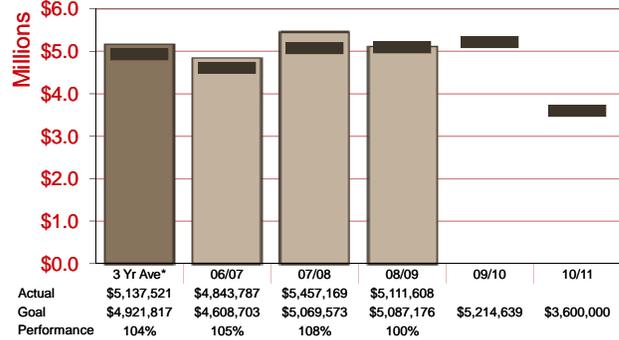
GOAL MATRIX DASHBOARD

Actual Goal

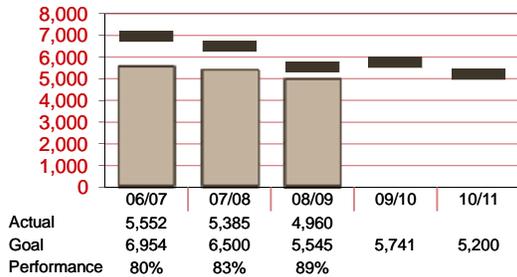
Gift Commitments



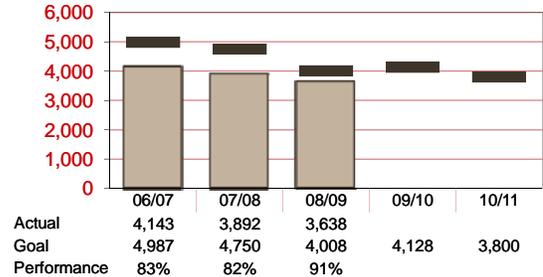
Total Advancement Investment



Number of Individual Donors



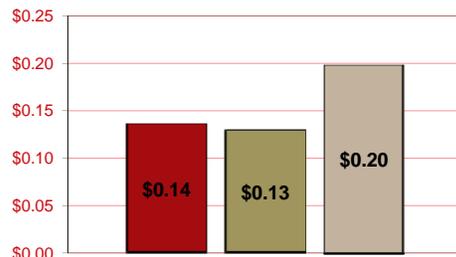
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

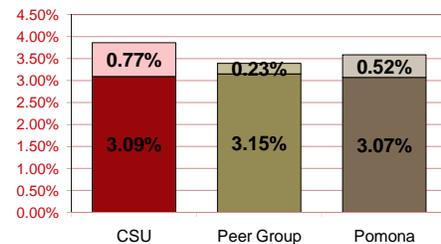
Cost Benefit Analysis

Cost to Raise a Dollar

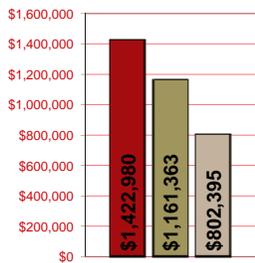


Investment as a Percentage of State General Fund

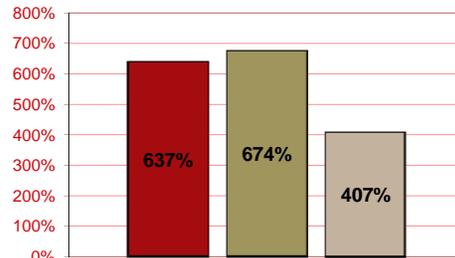
Total Advancement Expenditures



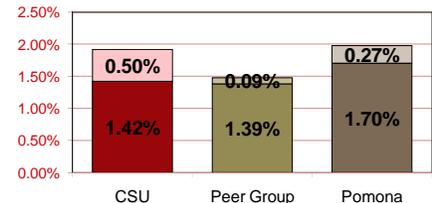
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



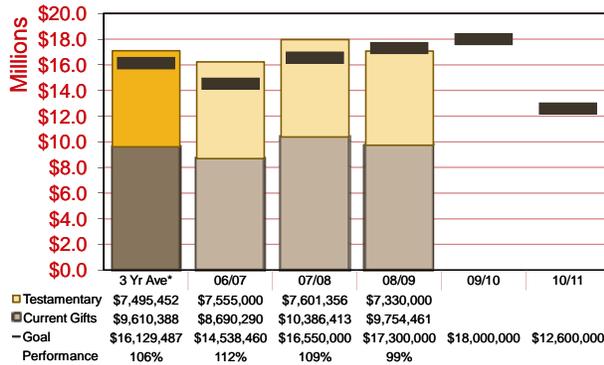
ENVIRONMENTAL SCAN / COMMENTS

Positioning the university for the public phase of its inaugural comprehensive campaign has been a major focus for Cal Poly Pomona. This goal, as well as all aspects of University Advancement operations, has been dramatically hampered by the greatest series of budget cuts in CSU history. Despite the recognized priorities directly and indirectly associated with the comprehensive campaign, the division took the largest cut (28 percent) of any division at the university for the 2009-10 fiscal year. These actions have driven the division leadership to identify a narrowed and more strategic focus as it relates to development, communication, advancement services and alumni affairs. Based on a capacity report from campaign counsel Grenzbech Glier and Associates, Cal Poly Pomona leadership set the 5-7 year campaign goal at \$150 million. 2008-09 marked the first year of counting towards that goal and resulted in the largest single fundraising year in Cal Poly Pomona history. Nearly \$27 million in gifts and pledges were received, virtually doubling the previous campus record for a single year.

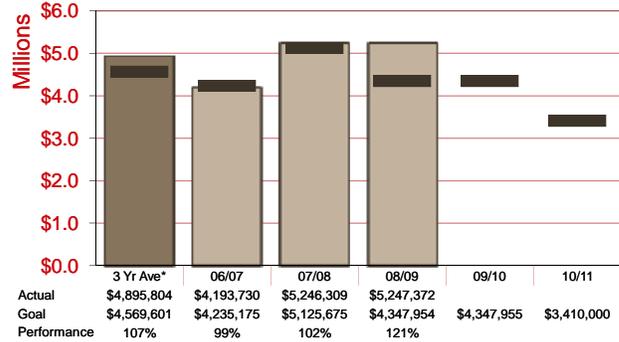
GOAL MATRIX DASHBOARD

Actual Goal

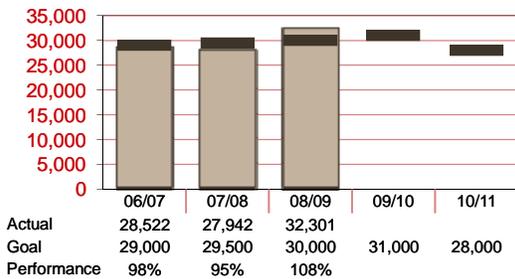
Gift Commitments



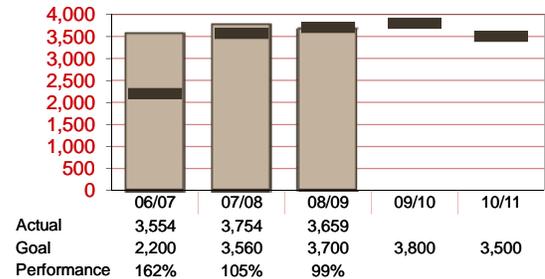
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

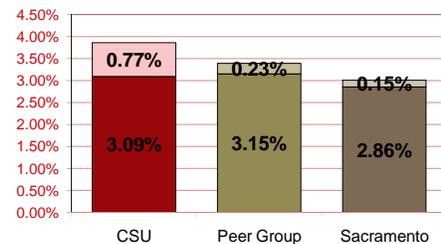
Cost Benefit Analysis

Cost to Raise a Dollar

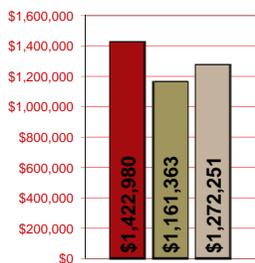


Investment as a Percentage of State General Fund

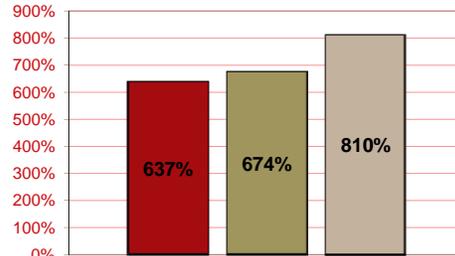
Total Advancement Expenditures



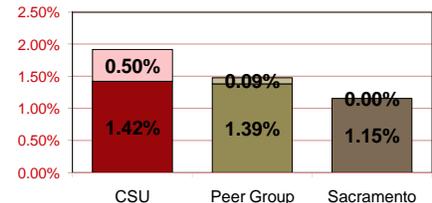
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



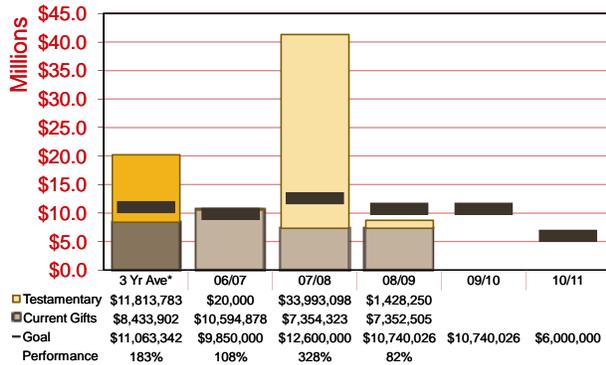
ENVIRONMENTAL SCAN / COMMENTS

Sacramento State has continued to make major strides toward reaching the goals outlined in President Gonzalez' Destination 2010 initiative. University Advancement helped to build community support by engaging alumni and friends of the University, promoting awareness among alumni, community and business leaders through its strategic communication efforts and increasing private gifts to the campus. Despite the region's economic downturn and University budget constraints, Sacramento State exceeded its 2008-09 fundraising target for the fourth year in a row, recording \$17 million in gift commitments. The University Foundation continued to shift its focus on generating private support for academic priorities. Through their personal individual gifts and leveraging relationships in the Sacramento region, the Foundation Board of Directors launched their first fundraising initiative, Troops to College. Increased alumni and community involvement in the University Foundation, Alumni Association and advisory boards such as the Planned Giving Advisory Board, helped to raise our visibility in the community, re-engage alumni, improve our advocacy efforts and increase private giving and testamentary commitments for student scholarships, endowed faculty and program support. As the campus prepares for the year 2010 and beyond, University Advancement will lead the campus celebration of Destination 2010 by bringing regional visibility to the initiative's achievements. With the President's leadership, supported by the new advancement management team and University Foundation Board of Directors, Sacramento State is positioned to succeed with its advancement efforts well into the future.

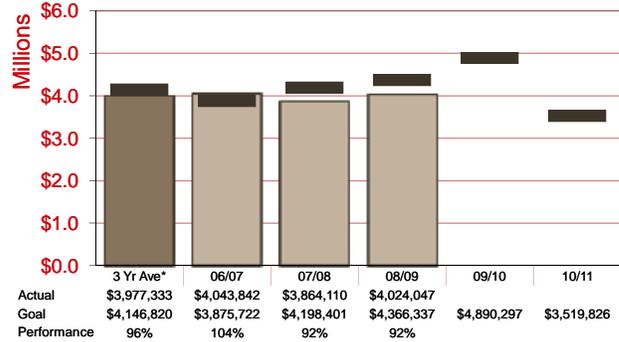
GOAL MATRIX DASHBOARD

Actual Goal

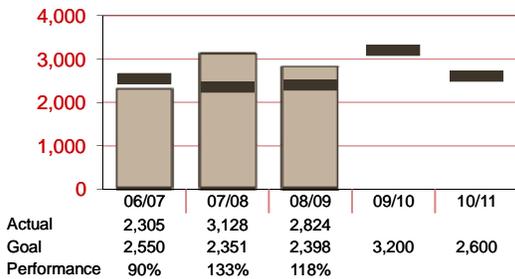
Gift Commitments



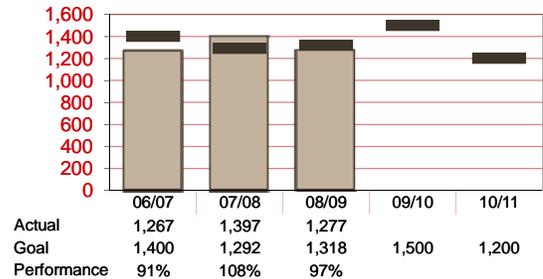
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

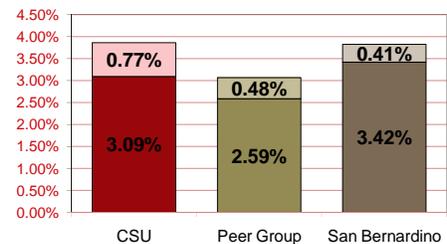
Cost Benefit Analysis

Cost to Raise a Dollar

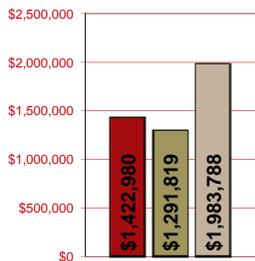


Investment as a Percentage of State General Fund

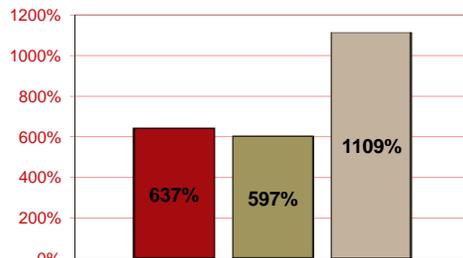
Total Advancement Expenditures



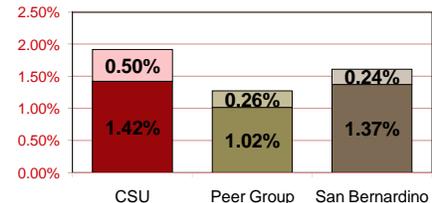
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



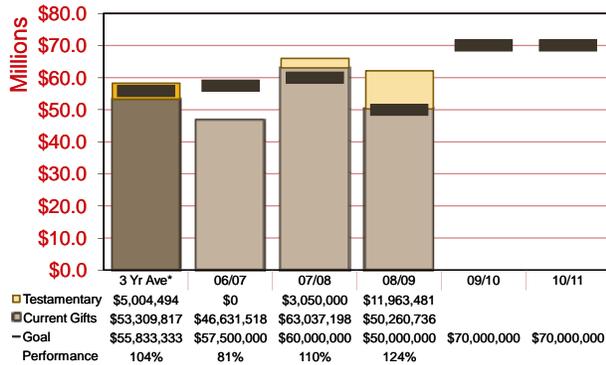
ENVIRONMENTAL SCAN / COMMENTS

University Advancement has shown excellent results in the past five years. In Fiscal Year 2008-09, CSUSB raised \$8,780,755 in philanthropic support. The campus continues to build a culture of philanthropy with external and internal constituents as evidenced by the increased participation in our last faculty/staff campaign and by the number of new volunteers serving on boards to support advocacy and fundraising efforts. We are pleased to have closed the campaign for our campus observatory on which we have recently broken ground. Our efforts for a possible capital campaign to assist in funding a performing arts building are on hold until State funds for capital projects are again available. While we will continue to explore the possibility of a 50th anniversary capital campaign, timing is an issue (standard procedures would have called for us to have already embarked on initial campaign stages). Still, we will incorporate campaign preparedness in short- and long-term plans. A major undertaking this year has been the development of a philanthropic foundation at CSUSB. The first step has been to recruit a new Foundation Board of Governors, with more than seventy members who will serve, and with committees focused on Development, Gift Acceptance, Investment, Audit and Advocacy. The chair of our previous President's Advancement Council, a major donor, has agreed to remain as president of the new Board. We are also working on implementing better systems for the management of our gifts funds, investments and reporting.

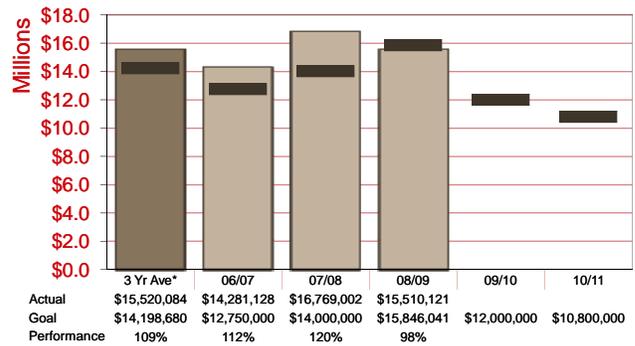
GOAL MATRIX DASHBOARD

Actual Goal

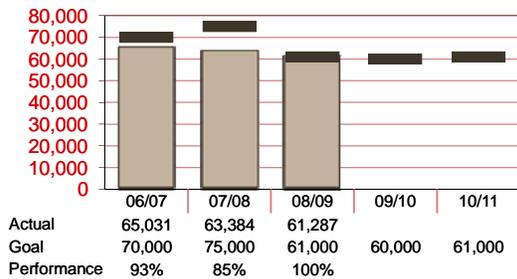
Gift Commitments



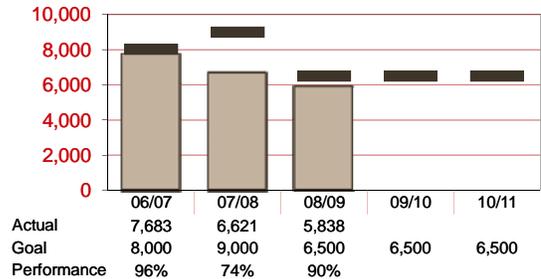
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

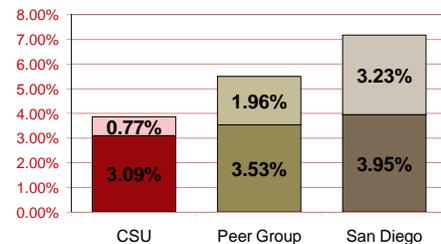
Cost Benefit Analysis

Cost to Raise a Dollar

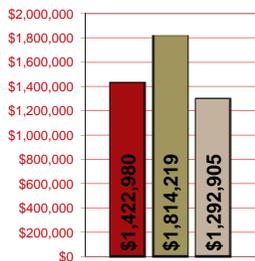


Investment as a Percentage of State General Fund

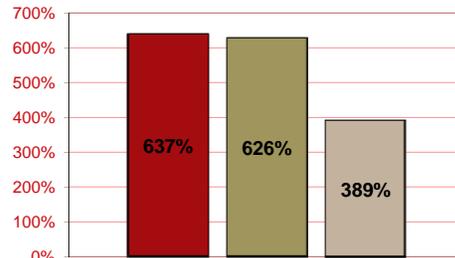
Total Advancement Expenditures



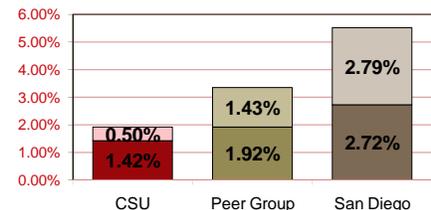
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



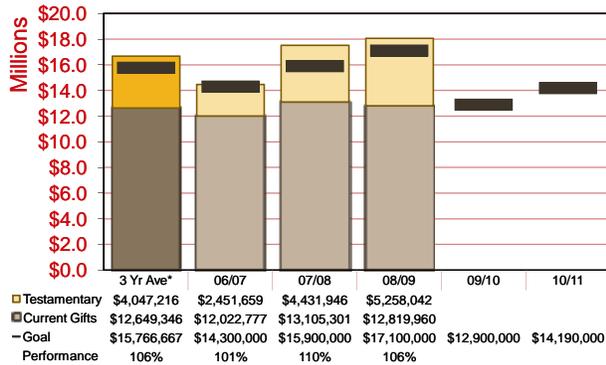
ENVIRONMENTAL SCAN / COMMENTS

San Diego State University continues to enjoy considerable fundraising success in spite of a slow-to-recover economy and additional state budget cuts. For the fiscal year that ended June 30, 2009, the Campanile Foundation, SDSU's philanthropic foundation, received \$65 million in cash and pledges. In July 2007, SDSU launched its first comprehensive fundraising campaign. As of June 30, 2009, the campaign had collected approximately \$143 million in gifts towards its \$500 million goal. In spite of this success, the fundraising environment continues to be very challenging. Donors – particularly at the major gift level – remain cautious despite signs of a recovering economy. Compounding the situation is a \$55 million budget cut to SDSU which resulted in an over \$800,000 or 12% reduction for University Relations & Development. Furlough savings and student fee increases have softened the blow but development staff now have two fewer working days per month to make visits and solicit gifts. Overall staffing in the division is down by 18 positions from January 2009. On the positive side, donors clearly understand the economic challenges faced by hard-working students. SDSU's "Fuel Potential" scholarship drive – launched in July 2009 – has attracted more than \$4.1 million in support and is fast approaching its \$5 million goal. In October 2009, SDSU opened the new \$11 million Parma Payne Goodall Alumni Center – funded entirely by SDSU alumni. University Relations & Development also recently secured university funding to initiate a badly-needed Advance software upgrade – a solid example of the growing culture of philanthropy across campus.

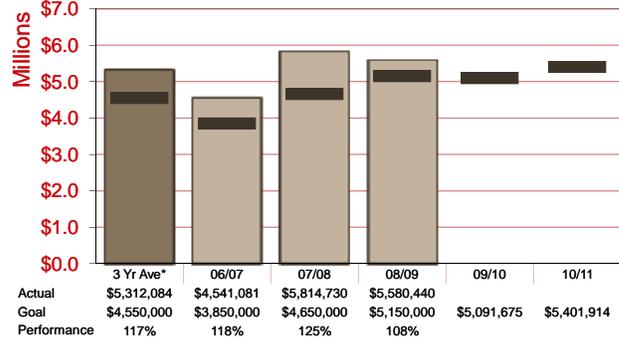
GOAL MATRIX DASHBOARD

Actual Goal

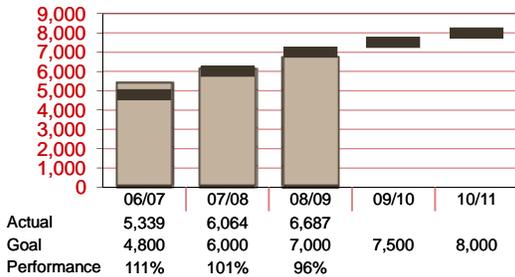
Gift Commitments



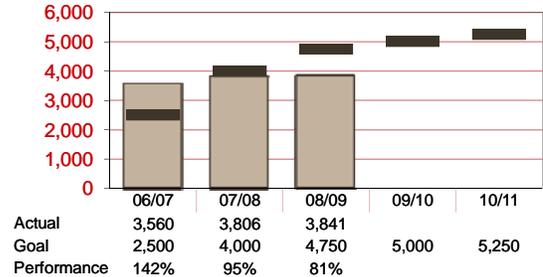
Total Advancement Investment



Number of Individual Donors



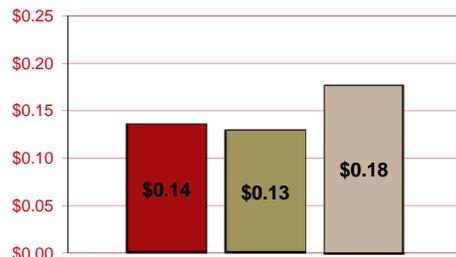
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

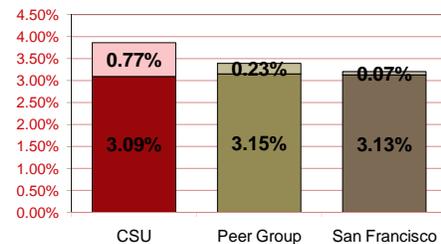
Cost Benefit Analysis

Cost to Raise a Dollar

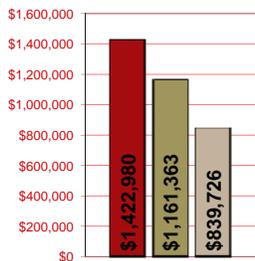


Investment as a Percentage of State General Fund

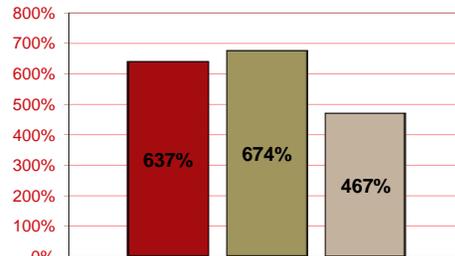
Total Advancement Expenditures



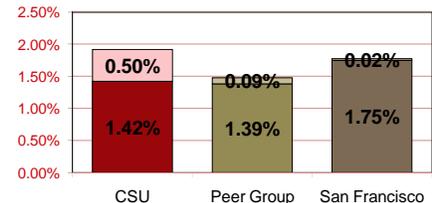
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



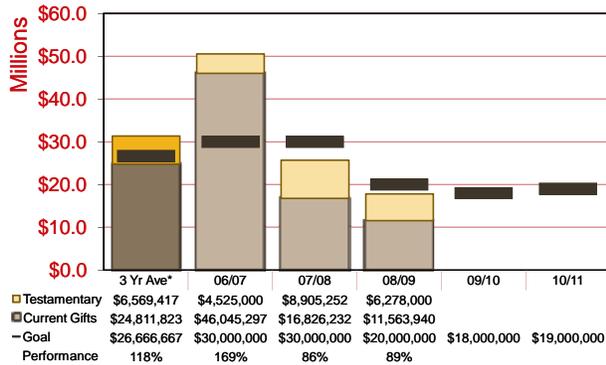
ENVIRONMENTAL SCAN / COMMENTS

Progress toward building pride, recognition, and revenue successfully continues at SF State. Notable alumni, faculty and administrators continue to have national visibility and are featured in major news media to discuss important issues to SF State, the CSU, Higher Education and California. Continued advocacy work secured significant federal appropriations to enhance various programs at SF State. Our fundraising and advocacy efforts also resulted in enhanced communication with alumni, parents, and friends of SF State who not only make a financial contribution but also have demonstrated a willingness to advocate on behalf of higher education and the CSU. In FY 08/09, our development trends continued upwards as the number of alumni and individual donors continued to increase. However, with reduced personnel and furlough days, and a still-recovering economy, the expectations are for a decline in fundraising dollars for FY 09/10. Our FY09/10 fundraising goal of \$12.9M reflects this challenge, but it still meets our commitment of raising 10% of our general fund budget.

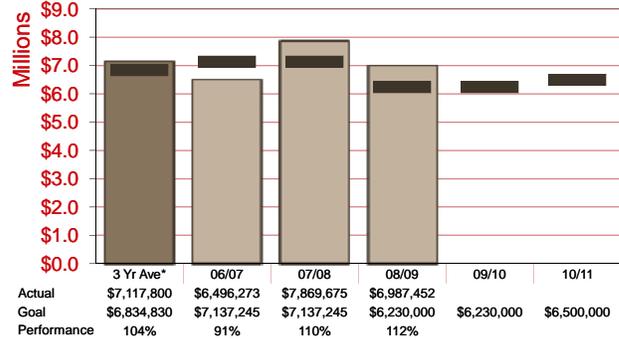
GOAL MATRIX DASHBOARD

Actual Goal

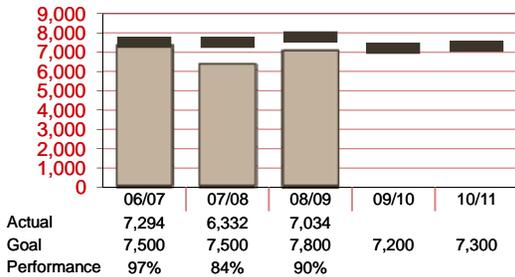
Gift Commitments



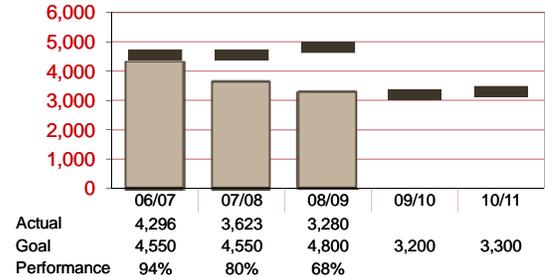
Total Advancement Investment



Number of Individual Donors



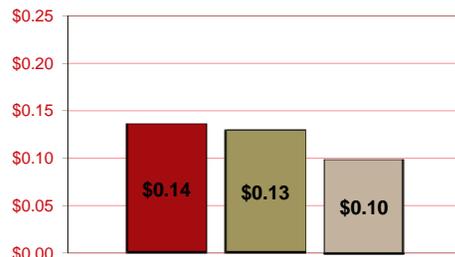
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

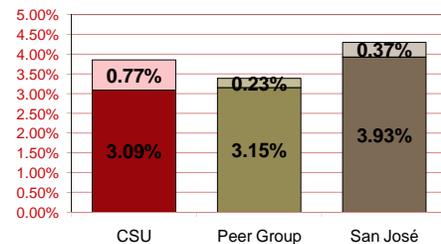
Cost Benefit Analysis

Cost to Raise a Dollar

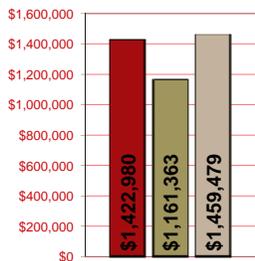


Investment as a Percentage of State General Fund

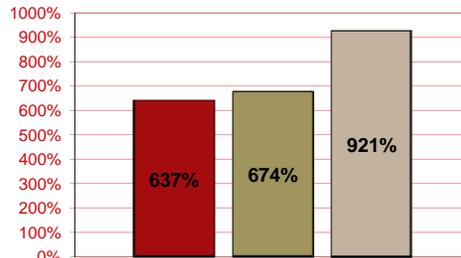
Total Advancement Expenditures



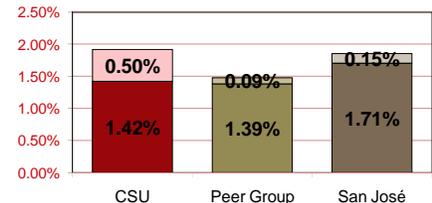
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



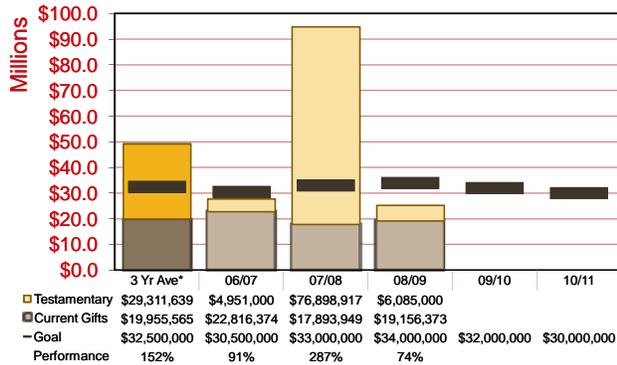
ENVIRONMENTAL SCAN / COMMENTS

Since its founding in 1857, San José State University has been recognized for effectively training the workforce in Silicon Valley and throughout California. SJSU is comprised of over 30,000 students, 3,200 faculty and staff members, and 134 degree programs on a 154-acre downtown campus anchoring the nation's 10th largest city, San José. As the oldest campus in the California State University system, SJSU continues to build on its historic legacy, providing more than 7,536 well-prepared graduates last year. Under the leadership of President Whitmore and his senior cabinet, the comprehensive campus-wide strategic planning process has entered its final year before the public launch. The Advancement Division played an integral role in this process, and over the past year, has made progress towards the goals articulated in the 2008-09 advancement plan. This progress is detailed more fully below. The Tower Foundation was pleased to add three new board members to its board of directors during the past fiscal year. They include Cindy Kenyon-Lazares, a 1976 college of business graduate who co-founded Shilling & Kenyon, one of the top regional accounting firms in Silicon Valley; Brad Zaro, a 1974 and 1981 college of science graduate who was the founder and CEO of Climimetrics Research Associates, a biological consulting firm which tests drugs in clinical trials; and Irene Baba, our first SJSU student representative. The campus continues to prioritize one-time funding to support some personnel for the campaign.

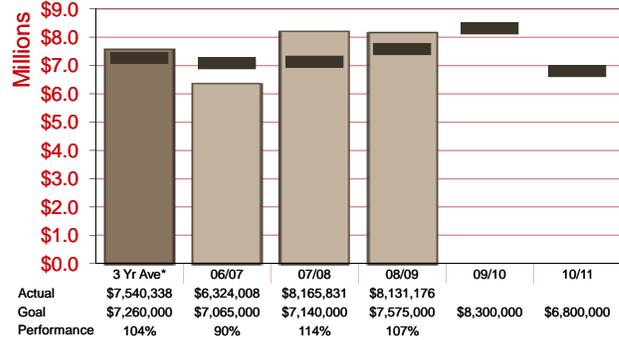
GOAL MATRIX DASHBOARD

Actual Goal

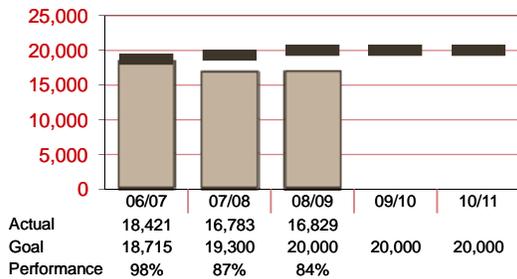
Gift Commitments



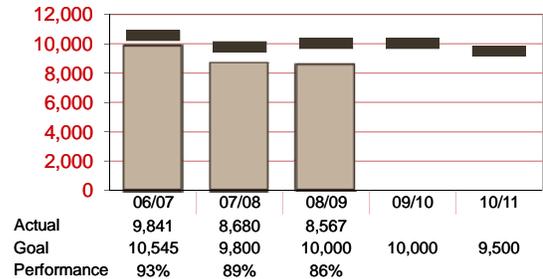
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

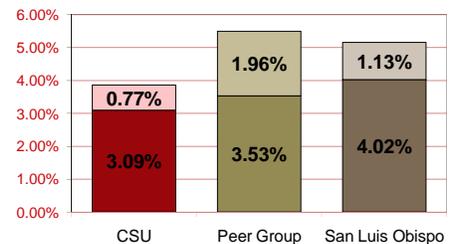
Cost Benefit Analysis

Cost to Raise a Dollar

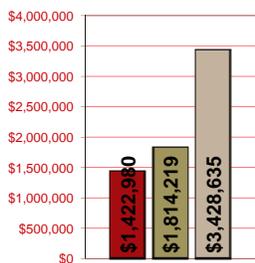


Investment as a Percentage of State General Fund

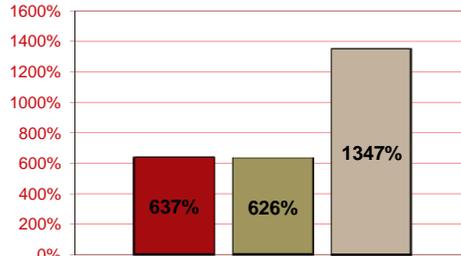
Total Advancement Expenditures



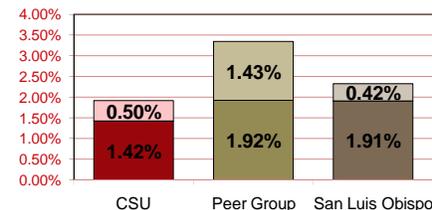
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



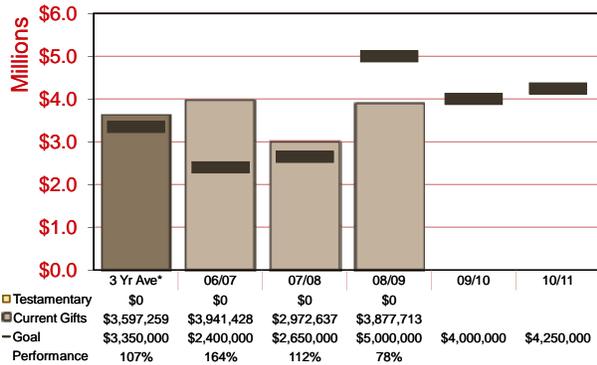
ENVIRONMENTAL SCAN / COMMENTS

Three significant factors have affected Cal Poly's Advancement plans: 1) Completion of a new Strategic Plan. This plan, which was completed over the last 12 months, identifies three key visions for Cal Poly: a. To be the nation's premier comprehensive polytechnic university; b. To be a nationally recognized innovative institution; c. To help California meet future challenges in a global context. This vision, with its underlying values and metrics, removes a barrier to campaign planning and provides a sturdy cornerstone for the development of campaign priorities. 2) Leadership transition. Long-time Cal Poly President Warren Baker recently announced that he will retire when a successor assumes the presidency. This announcement has triggered the usual campus anxiety surrounding transitions. The leadership team includes a terrifically able – but temporary – Provost, so we will be mindful that this interregnum does not cause delay in important campaign-related activities. This transition calls into question whether we should launch the quiet phase of our planned campaign now scheduled July 2010. 3) Budget cuts. Reduced state funds allocated to Advancement, plus reductions in expected "campaign resources" generated by the recently approved gift fee and endowment fee increase, left the Division with considerably less capacity than anticipated entering 2009. To meet the challenge, we focused on our "core business," developed more robust metrics to measure our work and reviewed work processes to look for new efficiencies.

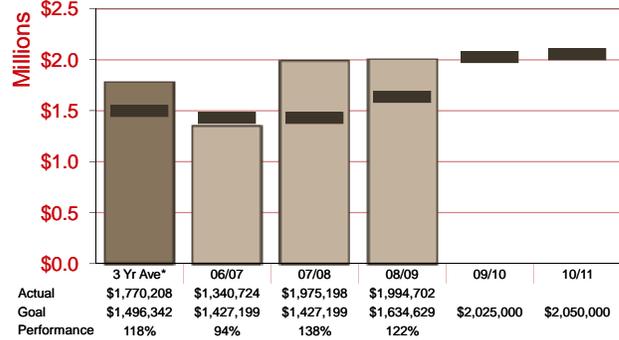
GOAL MATRIX DASHBOARD

Actual Goal

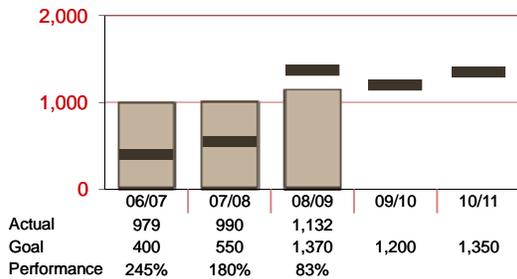
Gift Commitments



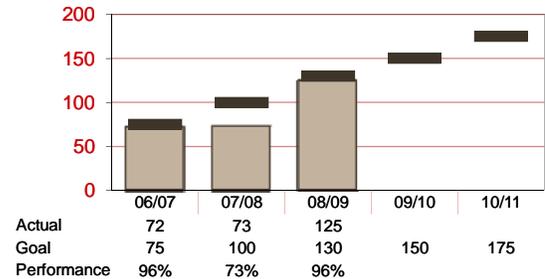
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

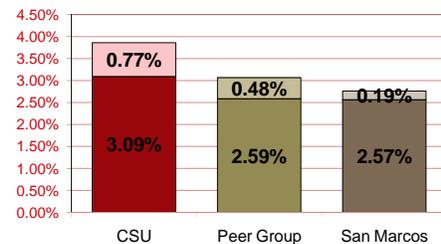
Cost Benefit Analysis

Cost to Raise a Dollar

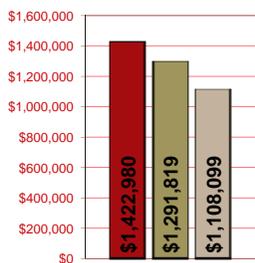


Investment as a Percentage of State General Fund

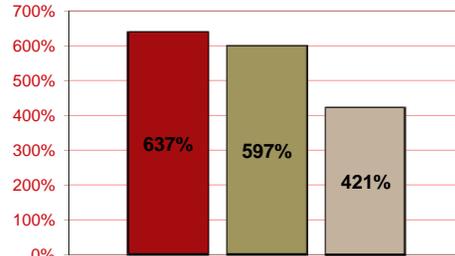
Total Advancement Expenditures



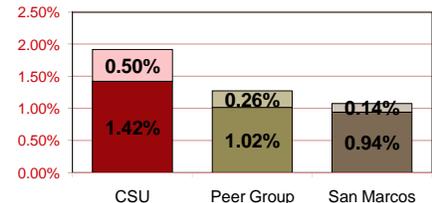
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



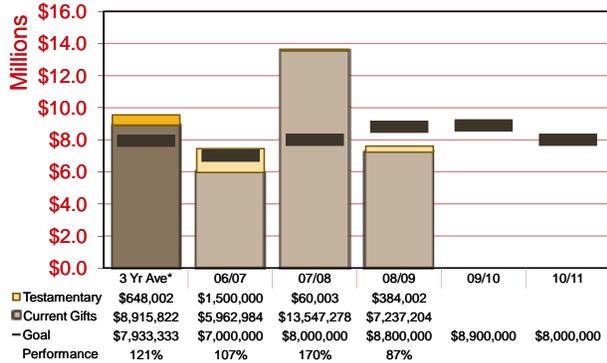
ENVIRONMENTAL SCAN / COMMENTS

With leadership and organizational changes from 2008 in place, University Advancement continued with its progress and next steps in establishing a philanthropic foundation, planning for our 20th Anniversary celebration, and planning for a comprehensive fundraising campaign. Although well-publicized state budget reductions, an unprecedented economic downturn, and charitable giving decreases seemingly own all aspects of the media, Cal State San Marcos remains positive, hopeful, and focused on the future. Consistent with the previous year's plans, we continued with organizational changes and staffing additions to emphasize the development aspect of advancement, with communications, advocacy, special events, and advancement services all designed to support development in concert. We have now fully implemented our web redesign, developed a new logo, developed a suite of development and fundraising brochures, redesigned our donor database, and strengthened our relationships with the community and with various college-based advisory councils. As we realistically and optimistically prepare for the future in light of the budgetary, economic, and charitable giving environment, we believe it is necessary to adjust our 2009-10 fundraising goal to \$4 million. While this was not our intention or hope, we believe 2009-10 will serve as a foundation for the future and that our 20th Anniversary in 2010 will be a launching pad for the campus' first-ever multi-year, comprehensive fundraising campaign. We believe that the strategic investment of non-state sources of revenue in University Advancement will position the campus well as we celebrate successes of the past and prepare for successes in the future.

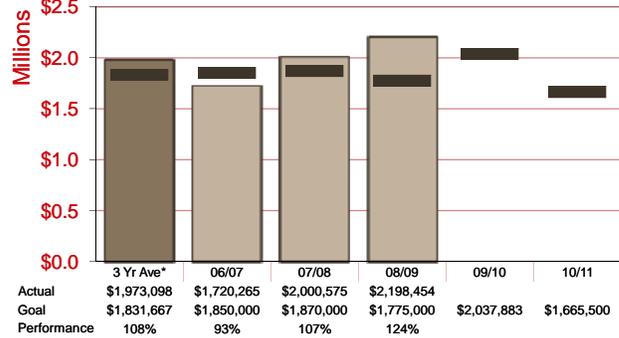
GOAL MATRIX DASHBOARD

Actual Goal

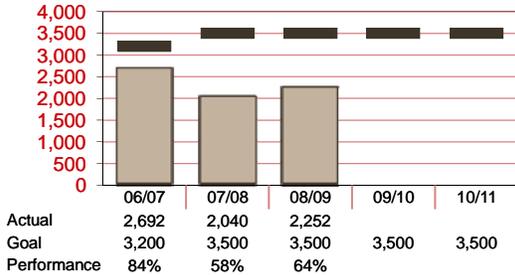
Gift Commitments



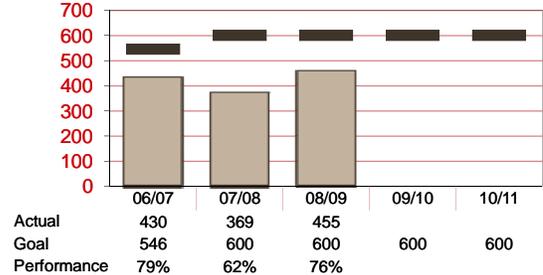
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

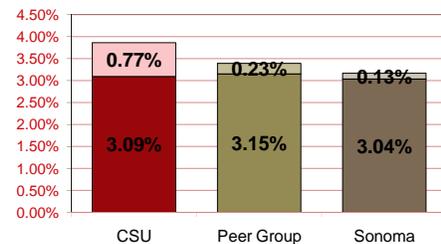
Cost Benefit Analysis

Cost to Raise a Dollar

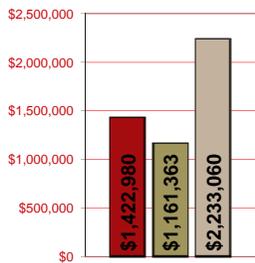


Investment as a Percentage of State General Fund

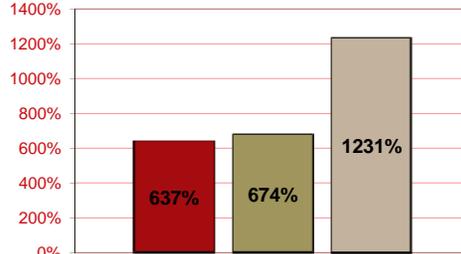
Total Advancement Expenditures



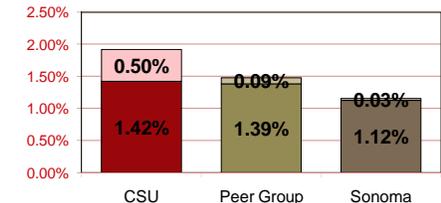
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



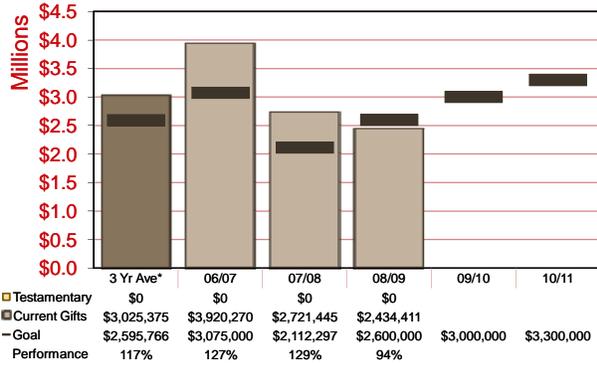
ENVIRONMENTAL SCAN / COMMENTS

Sonoma State University's Advancement function is divided between two divisions: University Affairs and Development. University Development includes major gifts, annual giving, advancement services, alumni relations and the Alumni Association. It has ten full-time and one part-time staff. The Office of University Affairs includes communications, marketing, media relations, special events, website design and management, government affairs and community relations and has a staff of six. Much of the first half of the fiscal year has been spent addressing media and faculty concerns about loans to individuals in the community backed by first trust deeds. This program began in 1997 primarily to support charitable remainder trusts. No new loan agreements have been executed since 2004, however one of the three outstanding loans at the beginning of the fiscal year went into default due to the sharp downturn in real estate investment due to the economy. There has been an inordinate amount of attention focused on this. Concerns required strategic responses to address each new issue as it emerged, trying to correct mistaken information and alleviate the concerns of the faculty, public and some donors. Despite the economic downturn we are pleased that \$8.3 million was raised, just shy of our \$8.8 million goal. Yet, the effect of the economy was strongly felt with approximately \$8 million in prior years' commitments written off this past year. These included Green Music Center as well as academic commitments. The largest GMC write off was a \$1.89 million pledge that was converted to an estate gift. Over \$5.5 million for the School of Business and Economics was written off from one donor.

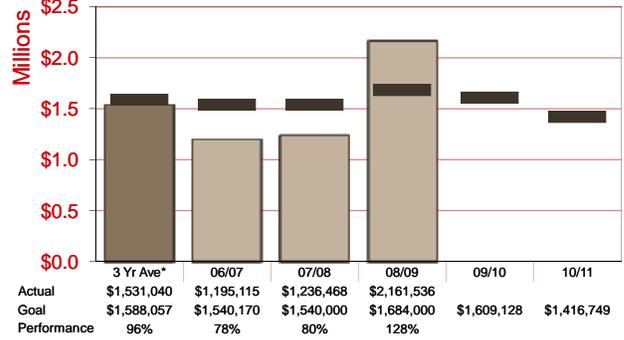
GOAL MATRIX DASHBOARD

Actual Goal

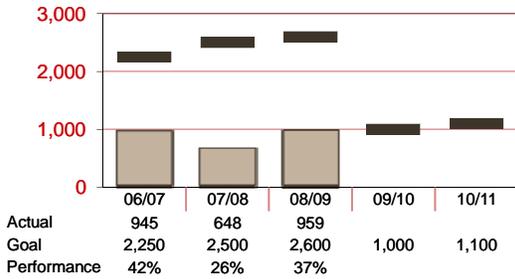
Gift Commitments



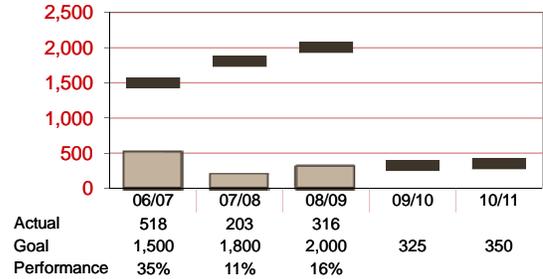
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

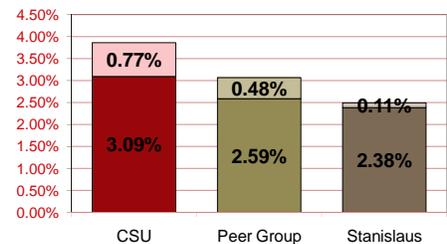
CSU Average
Peer Group Average
Stanislaus Average

Cost to Raise a Dollar

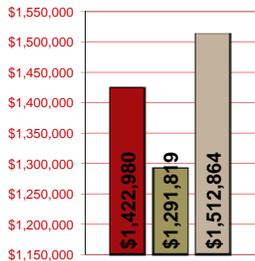


Investment as a Percentage of State General Fund

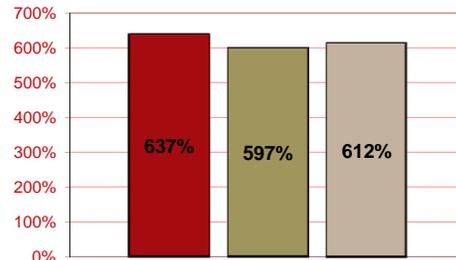
Total Advancement Expenditures



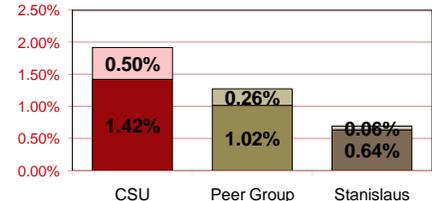
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

In an unprecedented time of statewide fiscal uncertainty that presents further challenges in fundraising for California State University, Stanislaus, it is empowering to have a Vice President for University Advancement firmly in place along with a capable and talented Advancement team to progress the University's mission. Previous plans spoke of department restructurings and needed hirings, but it is with great joy that the department is making strides toward operating at full staff, thanks to the hiring of a Manager of Advancement Services, two Directors of Development, an Alumni Affairs Director, and an Assistant Vice President for Communications & Public Affairs, among others over the past three years. In University Advancement's recent efforts to build a culture of philanthropy on campus, within the region, and among potential donors, University Advancement has been successful in its efforts to increase alumni engagement, develop a University branding plan, expand and innovate in our efforts to increase private support, and launch celebrations and events leading up to the 50th Anniversary of the University.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Council for Advancement and Support of Education Awards

Presentation By

Garrett P. Ashley
Vice Chancellor
University Relations and Advancement

Summary

This information item acknowledges California State University recipients of the 2009 Council for Advancement and Support of Education (CASE) Awards. The awards were given by CASE District VII, which encompasses Arizona, California, Guam, Hawaii, Nevada and Utah.

Background

Each year, CASE honors superior achievement in the field of university advancement. At this year's CASE District VII Conference, eight CSU campuses and the Chancellor's Office were recognized for outstanding communications and best practices in advancement.

California State University, Chico

- Silver in Excellence in Designs, Illustrations: "*Sapp Hall Illustration*"
- Gold in Campaign Fundraising: "*Gateway Science Museum Legacy Paving Stones*"

California State University, Fullerton

- Silver in Collaborative Fundraising: "*Vision 50: Board Re-Engagement*"
- Gold in Alumni Relations Collaborative Programs: "*Cal State Fullerton Gradfest 2009*"
- Gold in Student Recruitment Publications Package: "*A Real Education: CSUF Student Recruitment Campaign*"
- Gold in Video Fundraising: "*Just Peanuts a Day*"

California State University, Fresno

- Silver in Stewardship Fundraising: "*Fresno State Endowment Reporting*"
- Bronze in Internal Audience Periodicals: "*University Journal*"
- Bronze in Special Events: "*Campaign for Fresno State Launch*"
- Silver in Video Fundraising: "*Campaign for Fresno State*"

Inst. Adv.
Agenda Item 3
March 16-17, 2010
Page 2 of 2

Humboldt State University

- Gold in General Interest Magazine with 30-75,000 Circulation: "*Humboldt Magazine*"
- Silver in Web Sites: "*Meet Humboldt Web Site*"

California State University, Northridge

- Silver in Individual Student Recruitment Piece: *The Tseng College "Humanities Program Brochure"*

California Polytechnic State University, San Luis Obispo

- Bronze in Collaborative Fundraising: "*Partnering with Annual Fund*"

San José State University

- Gold in Special Events: "*Beach Blanket Babylon*"

California State University, Stanislaus

- Silver in Student Recruitment Publications Package: "*Reasons Campaign*"

Office of the Chancellor

- Gold in Individual In-House Multi-Page Publication: "*Preparing for CSU Counselor Tabs*"
- Silver in Special Events: "*CSU and AT&T Road to College Bus Tour*"
- Bronze in Special Programs Publication Package: "*Access to Excellence*"