

## **AGENDA**

### **COMMITTEE ON INSTITUTIONAL ADVANCEMENT**

**Meeting: 1:30 p.m., Tuesday, January 22, 2013**  
**Glenn S. Dumke Auditorium**

Roberta Achtenberg, Chair  
Kenneth Fong, Vice Chair  
Bernadette Cheyne  
Rebecca D. Eisen  
Debra S. Farar  
Margaret Fortune  
Peter G. Mehas  
Hugo N. Morales  
Jillian Ruddell

#### **Consent Items**

Approval of minutes of meeting of November 13, 2012

#### **Discussion Items**

1. Approval of the 2011-2012 Annual Report on Philanthropic Support to the California State University, *Action*

**MINUTES OF THE MEETING OF  
COMMITTEE ON INSTITUTIONAL ADVANCEMENT  
Office of the Chancellor  
Glenn S. Dumke Auditorium  
401 Golden Shore  
Long Beach, California**

**November 13, 2012**

**Members Present**

Roberta Achtenberg, Chair  
Kenneth Fong, Vice Chair  
Edmund G. Brown, Jr., Governor  
Bernadette Cheyne  
Debra S. Farar  
Bob Linscheid, Chair of the Board  
Peter G. Mehas  
Hugo Morales  
Charles B. Reed, Chancellor  
Jillian Ruddell

Chair Achtenberg called the meeting to order.

**Approval of Minutes**

The minutes of September 18, 2012 were approved by consent.

**Naming of a Facility – California State University, Fresno**

Mr. Garrett P. Ashley, vice chancellor university relations and advancement provided background information. The proposed naming recognizes The Jordan family's recent gift of \$29.4 million includes support for the construction of new lab space. This item will consider naming the new research building at the Jordan College of Agriculture Sciences and Technology as the Jordan Research Center.

President Welty referred to this as a transformational gift that will provide research space for faculty and students, allowing them to focus on real problems in the agricultural area.

**RESOLVED**, by the Board of Trustees of the California State University, that the new research building in the Jordan College of Agricultural Sciences and Technology at CSU Fresno be named the Jordan Research Center. **(RIA 11-12-10)**

**Naming of a Facility – California State University, Fresno**

Mr. Garrett P. Ashley provided background information. Foster Farms is a family-owned company with a 70-year legacy of poultry farming in California. Founded in 1939 by Max and Verda Foster, they started operations on an 80-acre farm near Modesto, California.

President Welty noted the exceptional contributions of Foster Farms which supports this naming proposal. The state-of-the-art educational facility is an important addition to the Jordan College of Agricultural Sciences and Technology that will allow students to perform in-depth research, participate in hands-on learning and gain skills in one of the leading agricultural industries.

Chancellor Reed acknowledged members of the Foster family and thanked them for their support of CSU students for many years. He also presented them with a framed resolution acknowledging them for their ongoing generosity.

**RESOLVED**, by the Board of Trustees of the California State University, that the Poultry Education Facility in the Jordan College of Agricultural Sciences and Technology at CSU Fresno be named the Foster Farms Poultry Education and Research Facility. (RIA 11-12-09)

Trustee Achtenberg adjourned the meeting.

## **COMMITTEE ON INSTITUTIONAL ADVANCEMENT**

### **Approval of the 2011-2012 Annual Report on Philanthropic Support to the California State University**

#### **Presentation By**

Garrett P. Ashley  
Vice Chancellor  
University Relations and Advancement

Lori A. Redfearn  
Assistant Vice Chancellor  
University Advancement

#### **Summary**

This item presents information on philanthropic support received by the 23-campus California State University (CSU) system from July 1, 2011 to June 30, 2012. Section 89720 of the Education Code requires that an annual gift report be submitted to the California Joint Legislative Budget Committee and the California Department of Finance.

The report is attached as a PDF document and additional campus highlights will be available for viewing on the system website at [www.calstate.edu/ua/philanthropic](http://www.calstate.edu/ua/philanthropic).

#### **Overview**

The California State University amassed \$297 million in gift commitments in 2011-2012. This fundraising success was achieved despite an economy that continues to struggle. Adjusting for an extraordinary pledge of \$42 million from the Kellogg Foundation to Cal Poly Pomona in the previous year, overall giving to the university was relatively level. The gift commitments were comprised of new gifts, pledges and testamentary provisions recorded during the period.

Charitable gift receipts totaled over \$240 million, the same amount acquired last year. Gift receipts, a combination of new gifts and pledge payments, represent resources that have been received and currently invested in the CSU's students, faculty and programs.

Donors continued to invest in student achievement and program innovation with over \$143 million in current support:

- \$16.1 million for student scholarships
- \$43.1 million for academic enrichment
- \$7.8 million for applied research
- \$1.8 million for faculty support
- \$1.4 million for library resources
- \$15.0 million for athletics
- \$29.6 million for public service programs
- \$2.1 million for facility improvements
- \$26.6 million for additional university priorities

The impact of philanthropy was also evident in upgraded campus facilities. The Joan and Sanford Weill Hall at the Donald and Maureen Green Music Center at Sonoma State University made its debut with world class acoustics and the Donald P. Shiley Biotechnology Center at San Diego State University provides students with state-of-the-art laboratories. Donors contributed \$20.8 million for building projects. Capital support also included over \$45.5 million in endowments and 64 irrevocable deferred gifts valued at \$22.3 million.

Of all charitable gifts received, 97 percent were designated to specific interests identified by the donor. Only \$7.7 million received was unrestricted and available to be directed to the university's most pressing needs.

**RESOLVED**, by the Board of Trustees of the California State University, that the Board adopts the *2011-2012 Annual Report of Philanthropic Support to the California State University* for submission to the California Joint Legislative Budget Committee and the California Department of Finance.



2011/2012  
**PHILANTHROPIC**  
ANNUAL REPORT



# TABLE OF CONTENTS

---

5	Message from the Chancellor
7	Overview of Philanthropic Support
8	Benchmarking Performance
9	Endowment
11	Individuals
13	Organizations
14	Chancellor Charles B. Reed's Tenure
17	System Highlights
18	Board of Trustee Recognitions
19	Definition of Terms
22	Appendix



# A MESSAGE FROM THE CHANCELLOR

---

The California State University was founded on a mission to provide California's students access to a high-quality education. Our predecessors understood that an educated population would make California one of the most successful economies in the world.

Now, more than a half-century later, the CSU has achieved extraordinary things. Our university system has become a national leader in providing affordable, accessible and high quality education to hundreds of thousands of students. We award approximately 99,000 degrees each year, and we have granted nearly 2.6 million degrees since 1961.

As I wrap up my final year as chancellor, I am proud to look back and remember all that we have built during my time at the university. We have formed alliances with the major industry groups in California. We have strengthened our collaborations with community groups to increase our outreach to underserved populations. We have forged incredible partnerships with our donors, who have enabled us to have tremendous success in the most challenging of economic times.



Yet in spite of these triumphs, our progress has been threatened due to California's massive fiscal crisis. As our state policymakers have turned away from viewing higher education as a key long-term economic investment, the promise of California's Master Plan has begun to slip away. And as a result of deep and ongoing state budget cuts, our vital university system is now in a position where its ability to fulfill its mission to serve California's students has been compromised.

So what lies ahead for the California State University? The answer lies with you, our supporters and our greatest advocates. Your continued support is an investment that will pay dividends well into the future because you are helping to develop the future engineers, artists, nurses and scientists who will lead California. Your advocacy on behalf of the CSU also sends an important message to state leaders that our state university is important, worthy of ongoing support and a key investment in California's future.

My deepest appreciation goes to all of those who have taken the time and made the commitment to help us fulfill our critical mission of educating California's students: our community supporters, foundation members and of course faculty, staff and students. It is my hope that this university system can and will continue on its path to greatness, thanks to the unwavering loyalty of the greater California State University family.

With kind regards,

Sincerely,

A handwritten signature in black ink that reads "Charles B. Reed". The signature is fluid and cursive, with the first name "Charles" and last name "Reed" clearly legible.

Charles B. Reed



# THE BERNARD OSHER FOUNDATION KEEPS BENEFITING THE CSU



**Both Bernard A. Osher, Founder and Treasurer of the Bernard Osher Foundation, and Barbro Osher, Chairman of the Board, were recognized by the CSU Board of Trustees for their support of higher education with honorary degrees of Doctor of Humane Letters.**

The Bernard Osher Foundation has contributed more than \$150 million in gifts to member institutions of California's three higher education systems: the California State University, the University of California and the California Community Colleges. This year, 17 CSU campuses received \$500,000 each to establish a scholarship endowment as part of the ongoing Osher initiative benefiting students transferring to the CSU from a California community college. These grants represent the second phase of the initiative.

"Once the Foundation began its endowed scholarship program for California's community colleges, we became ever more aware of the challenges facing students who wanted to continue their education and earn a baccalaureate degree," noted Mary Bitterman, Bernard Osher Foundation president. The timing of this support aligns with the CSU's priority initiative with community colleges to develop more than 450 associate degrees for transfer that guarantee admission to the CSU and expedite progress to a baccalaureate degree.

# OVERVIEW OF PHILANTHROPIC SUPPORT

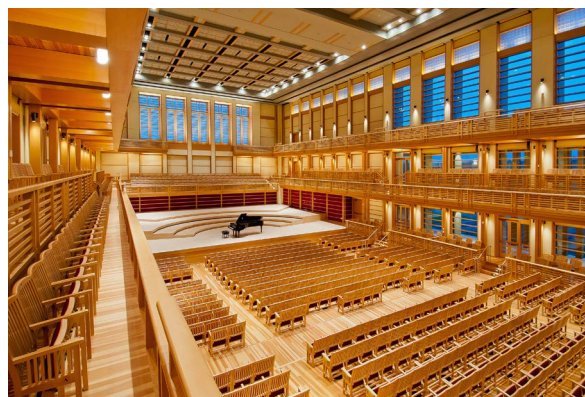
---

The California State University amassed \$297 million in gift commitments in 2011-2012. This fundraising success was achieved despite an economy that continues to struggle. Adjusting for an extraordinary pledge of \$42 million from the W.K. Kellogg Foundation to Cal Poly Pomona in the previous year, overall giving to the university was relatively level. The gift commitments were comprised of new gifts, pledges and testamentary provisions recorded during the period.

Charitable gift receipts totaled over \$240 million, reaching the same amount acquired last year. Gift receipts, a combination of new gifts and pledge payments, represent resources that have been received and currently invested in the CSU's students, faculty and programs.

Donors continued to invest in student achievement and program innovation with over \$143 million in current support:

- \$16.1 million for student scholarships
- \$43.1 million for academic enrichment
- \$7.8 million for applied research
- \$1.8 million for faculty support
- \$1.4 million for library resources
- \$15.0 million for athletics
- \$29.6 million for public service programs
- \$2.1 million for facility improvements
- \$26.6 million for additional university priorities



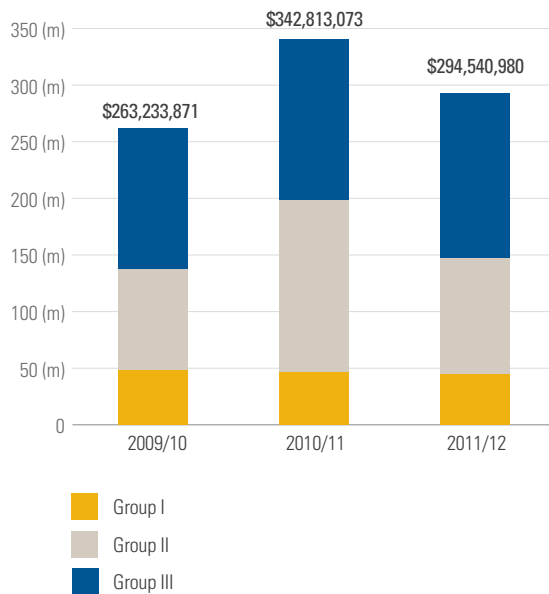
Joan and Sanford I. Weill Hall

The impact of philanthropy was also evident in upgraded campus facilities. The Joan and Sanford I. Weill Hall at the Donald and Maureen Green Music Center at Sonoma State University made its debut with world class acoustics and the Donald P. Shiley Biotechnology Center at San Diego State University provides students with state-of-the-art laboratories. Donors contributed \$20.8 million for building projects. Capital support also included over \$45.5 million in endowments and 64 irrevocable deferred gifts valued at \$22.3 million.

Of all charitable gifts received, 97 percent were designated to specific interests identified by the donor. Only \$7.7 million received was unrestricted and available to be directed to the university's most pressing needs.

# BENCHMARKING PERFORMANCE

## Three-Year History of Charitable Gift Commitments by Peer Group\*



\*Does not include the Chancellor's Office.

The factors for determining peer groups include the number of full time professional fundraisers, the number of individual donors, and the endowment market value. These factors have been determined as the leading indicators for fundraising success.

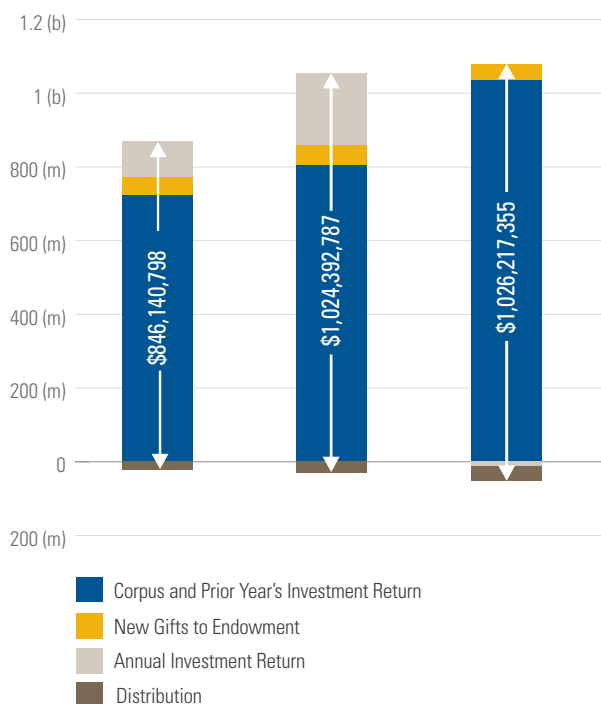
## Charitable Gift Commitments as a Percentage of the State General Fund Allocation

	2009/2010	2010/2011	2011/2012
Gift Commitments*	\$265,200,484	\$344,667,504	\$297,010,687
State General Fund	\$2,166,062,017	\$2,433,901,014	\$1,936,822,538
Total Gift Commitments as a Percentage of State General Fund Allocation	12%	14%	15%
Group I Average	8%	7%	7%
Group II Average	10%	15%	13%
Group III Average	23%	23%	32%

\*Includes gift commitments to the Chancellor's Office.

# ENDOWMENT

## Endowment Market Value



The total market value rounded off above the \$1 billion mark for the second year in a row. Overall investment returns were down slightly, trailing market benchmarks.

In 2011-2012, donors contributed \$45.6 million in new gifts toward endowments. Over a three-year period, \$150 million in new endowment gifts has been added to endowments throughout the CSU. Collectively, CSU institutions distributed nearly \$42 million from endowment in support of student scholarships, faculty research and academic programs.

After two years of investment recovery, endowment investments lost an average of 1.2 percent in 2011-2012. Peer group and systemwide investment returns are presented as dollar-weighted averages.

## Endowment Investment Performance

Investment Pool Asset Range	# CSU	CSU Average Investment Return
>\$100 M to ≤ \$500 M	3	-0.7%
>\$50 M to ≤ \$100 M	4	-0.9%
>\$25 M to ≤ \$50 M	5	-2.5%
≤\$25 M	12	-1.7%

2011/2012 CSU Median = -1.34%

2011/2012 Industry Benchmark: Russell 3000 65% and Barclay's Aggregate Bond Index 35% = 3.74%



# ENTREPRENEURIAL THINKING AT SAN DIEGO STATE UNIVERSITY



**Longtime San Diego State University donors Larry and Madeline Petersen decided to bequeath \$2 million of their estate to the Entrepreneur-in-Residence program.**

Mr. Petersen, Founder and President of LP Marketing and an alumnus, believes he learned the brand of innovative thinking that “stays with you for life” while a student at SDSU. The Peterson’s generous bequest will generate new opportunities for the center to expand and develop links with each of SDSU’s seven colleges — in short, to teach every student to think like an entrepreneur.



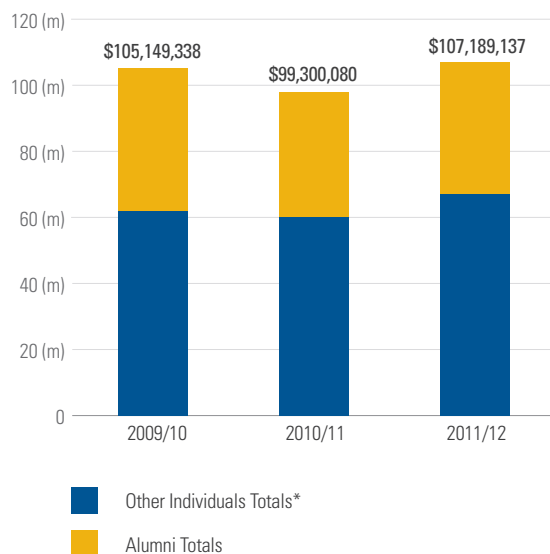
# INDIVIDUALS



Gifts from individuals include giving from alumni, parents, faculty, staff, students and friends of the university. In 2011-2012, gift receipts from individuals increased \$7.9 million, or 8 percent, to \$107 million. Thirteen percent of all gifts from individuals was attributed to eight gifts of more than \$1 million at four campuses (Fullerton, San Diego, San Francisco, and Sonoma).

The number of donors is a key indicator of success in attracting philanthropic support to the university. Continuing with a steady growth trend over recent years, the number of individuals giving to the CSU reached 224,194.

## Individual Giving



\* Includes gifts from parents, faculty, staff, students and friends of the university.

In 2011-2012, alumni donors made up 33 percent of individual donors and contributed \$40 million, or 37 percent of giving from individuals. Alumni additionally supported the university with nearly \$1.4 million in membership dues.



# CLINICAL TEACHER PREPARATION



## **The California State University received several significant donations for the *Clinical Teacher Preparation in California* project.**

Donations included gifts of \$350,000 from the S.D. Bechtel, Jr. Foundation, \$52,500 from The David and Lucile Packard Foundation, and over \$530,000 from The James Irvine Foundation. Funds from these foundations support the two-year project, which initiates a range of innovative clinical approaches for preparing future teachers and seeks to significantly improve both the preparation of novice teachers and the learning of all students in a broad range of settings, thereby contributing to closing achievement gaps. The project focuses on establishing collaborative partnerships for preparing new teachers that involve the CSU, other universities, school districts, and schools.

# ORGANIZATIONS

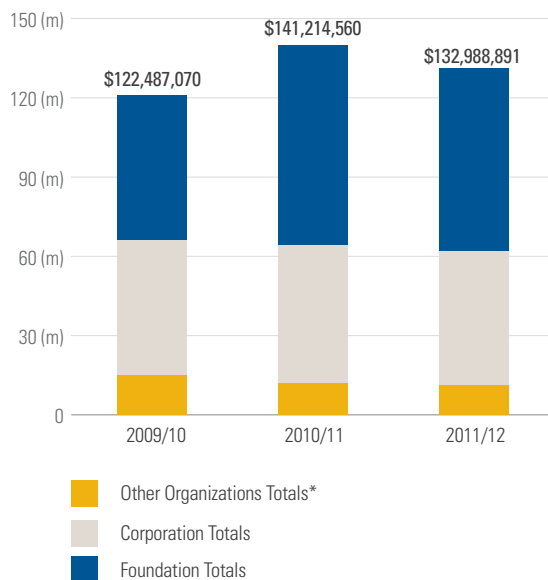


Gifts from organizations include giving from corporations, foundations, and other organizations, such as the United Way. In 2011-2012, gift receipts from organizations decreased \$8 million, or 6 percent, to \$133 million.

This year, donations from corporations held relatively steady at \$52 million, which included \$4.4 million in company products. Corporations also support educational priorities by matching contributions from their employees. The CSU received 3,234 matching gifts to enhance the value of individual contributions by over \$1.5 million.

Foundation contributions decreased 8 percent from prior year dropping to \$69.7 million. The aggregate value of foundation gifts equaled nearly one third of all charitable gift receipts in 2011-2012. With 360 contributions, family foundations contributed \$26 million explaining some of the shift from individual giving. Thirteen gifts of \$1 million or more were received by ten universities, including East Bay, Fullerton, Long Beach, Monterey Bay, Northridge, Pomona, San Diego, San José, San Luis Obispo, and Sonoma.

## Organization's Giving



\* Includes gifts from all organizations not defined as a Corporation or Foundation.

# CHANCELLOR CHARLES B. REED'S TENURE



Under Chancellor Charles B. Reed's nearly 15 year leadership, the California State University's endowment increased 200 percent from \$339 million to \$1.02 billion. Subsequently, endowment dollars per full-time equivalent student more than doubled from \$1,263 to \$2,845.

Chancellor Reed oversaw almost \$3.6 billion in gift receipts to the CSU—an average of \$240 million per year. Of this, nearly \$200 million was raised for student scholarships, over \$691 million for academic enrichment, and \$113 million for research. Chancellor Reed and the CSU Board of Trustees recognized over 140 significant leadership gifts to the university that resulted in the naming of academic programs or facilities. Notable gifts throughout the years have included a \$29.4 million gift to the College of Agricultural Sciences and Technology at CSU Fresno, a \$42 million donation to Cal Poly Pomona's comprehensive campaign, and a \$60 million bequest to the Architecture Department at Cal Poly San Luis Obispo.

After his retirement, Chancellor Reed's philanthropic legacy lives on with the Chancellor Charles B. Reed Endowed Scholarship, which recognizes an exemplary Hearst/CSU Trustees' recipient. The California State University Foundation Board of Governors honored his commitment to students by naming this honored recipient as the Chancellor Charles B. Reed Scholar.





Above: Chancellor Reed, second from the left, and the Chancellor Charles B. Reed Scholar, Anthony Green, from Cal Poly Pomona pose at the 2012 September Board of Trustees meeting.

Right: During the 2007 May Board of Trustees meeting, Chancellor Reed presents donor Connie L. Lurie with a naming resolution recognizing her \$10 million gift commitment to the Connie L. Lurie College of Education, at San José State University.





## 2012-2013 William R. Hearst/CSU Trustees' Award for Outstanding Achievement honorees attending the awards ceremony at the September 2012 CSU Board of Trustees meeting:

Front row: Oscar Perez, CSU Fresno; Dannisha Denise Battle, Humboldt State University; Tessy Pumacchua, CSU San Bernardino; Corie Lee Loiselle, CSU Northridge; Diem Hoang, CSU Fullerton; Loan Thi Kim Nguyen, CSU East Bay; Erin Enguero, San José State University; Chloe Keller, CSU Channel Islands; Asja D. Hall, CSU Dominguez Hills

Back row: Marilyn Thomas, San Francisco State University; Anthony Green, Cal Poly Pomona; Shaniece Williams, CSU Bakersfield; Toni Gonzalez, CSU Los Angeles; Erin Bell, CSU Stanislaus; Serena Do, CSU Long Beach; Beatriz Alcazar, Sonoma State University; Dominica M. Ranieri, CSU San Marcos; José F. Hernández, CSU Monterey Bay; Brieana Higley-Anderson, Cal Poly San Luis Obispo; Katrina Currie, CSU Sacramento; Maija Glasier-Lawson, CSU Chico; Stevan L. Edgecombe, California Maritime Academy

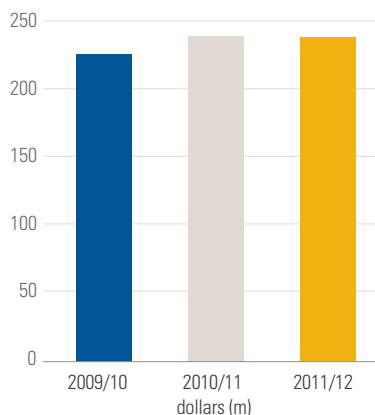
Not Pictured: Cassandra Cook, San Diego State University



## CHARITABLE GIFT RECEIPTS

New Gifts	\$181,227,480
Pledge Payments	\$58,950,547
<b>2011/12 TOTAL</b>	<b>\$240,178,028</b>

## CHARITABLE GIFTS: A 3-YEAR HISTORY

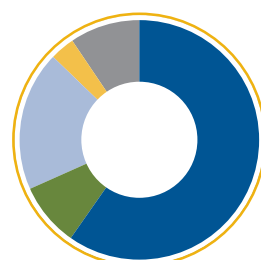


## CHARITABLE GIFTS BY SOURCE OF GIFT



Alumni	16.20%
Parents	1.45%
Other Individuals	23.63%
Foundations	31.61%
Corporations	22.03%
Other Organizations	5.07%

## CHARITABLE GIFTS BY GIFT DISBURSEMENT



Current Programs	59.83%
Campus Improvements	8.67%
Endowment	18.98%
Unrestricted	3.20%
Other	9.32%

# SYSTEM HIGHLIGHTS

- The CSU Foundation and CSU Long Beach received several large donations for the *Clinical Teacher Preparation in California* project. Donations to the institutions include gifts of \$300,000 and \$50,000 from the S.D. Bechtel, Jr. Foundation, \$27,500 and \$25,000 from The David and Lucile Packard Foundation, and \$300,000 and \$234,260 from The James Irvine Foundation. The two-year project, which began in September 2011, develops, evaluates, and begins scaling up an exemplary beginning teacher induction and support program with a STEM focus. It establishes a ground-breaking initiative in clinical preparation of teachers and focuses on establishing collaborative partnerships for preparing new teachers that involve universities, school districts, and schools.
- Two Osher philanthropies launched an initiative aimed to help California's community college students thrive academically. A total of \$10.5 million (\$8 million from The Bernard Osher Foundation and \$2.5 million from The Bernard and Barbro Foundation) is being evenly distributed among 21 institutions and is expected to generate approximately \$525,000 in scholarships for transfer students annually. These grants represent the second phase of The Osher Initiative for California Community College Students. The first scholarships will be awarded in the fall of 2013. The 16 CSU campuses are: CSU Channel Islands, CSU Dominguez Hills, CSU Fresno, CSU Fullerton, CSU Los Angeles, CSU Monterey Bay, CSU Northridge, CSU San Marcos, CSU Stanislaus, Humboldt State, San José State, Sonoma State, Cal Poly Pomona, Cal Poly San Luis Obispo, CSU Bakersfield and San Diego State.
- The Walter S. Johnson Foundation continued its support of the *Give Students a Compass* program with a \$100,000 gift, bringing the foundation's total giving to \$227,000 to the CSU Foundation. In its second phase, *Give Students a Compass* is supporting up to nine pilot sites around the state, selected to test new approaches to general education and transfer that could one day inform an improved statewide curriculum. All pilot sites involve both a California State University campus and the nearby community colleges serving many of the same students. Pilot projects seek ways to embed a greater number of high-impact practices into the GE transfer curriculum, improving student success in ways that are feasible, scalable and educationally effective.

## Gift Commitments 2011/12

New Gifts	\$181,227,480
New Pledges	\$51,753,622
Testamentary Commitments	\$61,651,616
Native American and Local Government Contributions	\$2,377,969
<b>TOTAL</b>	<b>\$297,010,687</b>



# BOARD OF TRUSTEES RECOGNITION

The CSU Board of Trustees recognized leadership gifts to the university by naming the following academic programs or facilities in 2011-2012:

- Recognizing a \$2 million gift, California State University, Fresno named the Meyers Family Sports Medicine Center to honor Marvin Meyers and his family. The sports medicine facility will feature more than 10,000 square feet of state-of-the-art amenities and equipment for Bulldog student-athletes. This project will allow for on-site physician examination and diagnosis, world class rehabilitation equipment, and ample office and meeting space to support the Fresno State sports medicine staff. The construction of the Meyers Family Sports Medicine Center will greatly enhance the overall athletics infrastructure and, more importantly, will greatly enhance the daily student-athlete experience.
- The Dairy Science building in the College of Agriculture, Food and Environmental Sciences at California Polytechnic State University, San Luis Obispo is now recognized as the Leprino Foods Dairy Innovation Institute. The Dairy Science building is a one-story structure comprised of dairy science laboratories, a conference room, processing plant and associated facilities totaling 18,000 square feet. The naming of the facility recognizes the \$5 million commitment from Leprino Foods Company of Denver, the world's largest producer of mozzarella cheese. This gift will allow Cal Poly San Luis Obispo's College of Agriculture, Food and Environmental Sciences to enhance the Dairy Science Department by creating an endowed chair in dairy foods who will serve as program director of the new Master's of Professional Studies in Dairy Foods.



# DEFINITION OF TERMS

---

## Charitable Gift Commitments

The data represents current year performance in developing philanthropic support for the institution. In addition to recognizing new gifts generated to support the institution, this measure acknowledges the important work achieved in securing on-going commitments through multi-year pledges and support promised through testamentary provisions in wills, trusts, and beneficiary designations. Testamentary provisions are not capitalized on the university's financial statements. These numbers will not reconcile to the annual audited financial statements that use accounting standards.

## Charitable Gift Receipts

Charitable gift receipts, also known as voluntary support, represents all gift income received in the form of cash, securities, in-kind contributions, irrevocable future commitments, and private charitable grants. For the purposes of this report, gifts are counted at face value. These national gift-reporting standards are defined by the Council for Advancement and Support of Education and the National Association of College and Business Officers. The Council for Aid to Education utilizes these standards in the annual Voluntary Support of Education survey. These numbers will not reconcile to the annual audited financial statements that use accounting standards.

## Endowment Market Value

The endowment market value includes assets held by both the university and its auxiliaries in all of the following categories:

### True endowment

Funds provided to the institution, the principal of which is not expendable by the institution under the terms of the agreement that created the fund.

### Term endowment

Similar to true endowment except that all or part of the funds may be expended after a stated period or upon the occurrence of a certain event as stated in the terms governing the funds.

### Quasi-endowment

Funds functioning as endowment such as surplus funds that have been added to the endowment fund, the principal of which may be spent at the discretion of the governing board.

## Group I

Universities categorized within Group I generally have less than 5,000 individual donors, less than 10 full-time professional fundraisers, and less than \$25 million in endowment market value. These advancement programs are building infrastructure and are striving toward raising gift commitments that are equivalent to 10 percent of the state general fund allocation.

---

## Group II

Universities categorized within Group II generally have between 5,000 and 10,000 individual donors, between 10 and 20 full-time professional fundraisers, and between \$25 million and \$50 million in endowment market value. These advancement programs are maturing and are expected to raise gift commitments that are equivalent to 10 percent to 15 percent of the state general fund allocation.

## Group III

Universities categorized within Group III generally have over 10,000 individual donors, over 20 full-time professional fundraisers, and over \$50 million in endowment market value. These more mature advancement programs have developed successful annual fund, major gift and planned giving operations complemented by strong alumni and communication programs. These programs are expected to raise gift commitments that are greater than 15 percent of the state general fund allocation.

## Pledges

Gift commitments paid in installments over a period of time, not to exceed five years. Pledges must be documented and are counted at face value

## Purpose of Gift

Refers to the donor's expressed intention for the use of the gift.

### Unrestricted

Gifts given to the institution without any restriction, regardless of any subsequent designation by the institution.

### Restricted

Gifts that have been restricted to support academic divisions, athletics, faculty compensation, research, public service, library operations, physical plant maintenance, student financial aid, or other restricted purposes.

### Property, Buildings, and Equipment (Campus Improvement)

- o Outright gifts of real and personal property for the use of the institution;
- o Gifts made for the purpose of purchasing buildings, other facilities, equipment, and land for the institution;
- o Gifts restricted for construction or major renovation of buildings and other facilities; and
- o Gifts made for retirement of indebtedness.

### Endowment

Funds to be retained and invested for income-producing purposes.

### Loan Funds

Outright gifts restricted by donors to be available for loans to students, faculty and staff.

---

## Deferred Gifts

Irrevocable commitments such as charitable gift annuities, charitable remainder trusts (including those administered outside the institution), gifts to pooled income funds, and remainder interests in property.

## Source of Gift

Sources of gifts are defined as those entities (individuals or organizations) that transmit the gift or grant to the institution.

### Alumni

Former undergraduate or graduate students who have earned some credit toward one of the degrees, certificates or diplomas offered by the institution for whom the university has a reasonable means of contacting. It is within the discretion of each university to limit alumni status to individuals who have obtained a degree and/or credential.

### Parents

These are individuals, other than alumni, who are the parents, guardians or grandparents of current or former students at the institution. An affiliation as an alumnus takes precedence over that of a parent for the purpose of this report.

### Other Individuals

This includes all other persons, including governing board members, who are not classified as either alumni or parent.

### Foundations

Personal/family foundations and other foundations and trusts that are private tax-exempt entities operated exclusively for charitable purposes. It does not include company-sponsored foundations.

### Corporations

This category includes corporations, businesses, partnerships, and cooperatives that have been organized for profit-making purposes, including corporations owned by individuals and families and other closely held companies. This category also includes company-sponsored foundations as well as industry trade associations.

### Other Organizations

Organizations not reported elsewhere, including religious and community organizations, fundraising consortia, and any other nongovernmental agencies.

## Testamentary Commitments

This category includes new estate provisions made in a will, revocable trust or beneficiary designation for which the institution has documentation. These provisions are counted at face value.

# PHILANTHROPIC PRODUCTIVITY

2011/2012 Fiscal Year

Chart I

	2009/2010 Total Gift Commitments	2010/2011 Total Gift Commitments	2011/2012 Total Gift Commitments	Three Year Average	2009/2010 Total Gift Receipts	2010/2011 Total Gift Receipts	2011/2012 Total Gift Receipts	Three Year Average
<b>GROUP I</b>								
Bakersfield	\$4,768,964	\$4,427,718	\$2,645,739	\$3,947,474	\$3,989,984	\$3,793,851	\$2,918,869	\$3,567,568
Channel Islands	\$2,920,661	\$1,933,365	\$2,014,940	\$2,289,655	\$1,645,105	\$2,749,650	\$2,648,451	\$2,347,735
Dominguez Hills	\$2,655,893	\$3,086,913	\$4,122,003	\$3,288,270	\$2,730,897	\$3,223,491	\$3,274,284	\$3,076,224
East Bay	\$5,091,539	\$6,089,800	\$5,192,515	\$5,457,951	\$3,792,620	\$6,088,580	\$3,079,080	\$4,320,093
Humboldt	\$7,245,821	\$11,561,333	\$7,535,171	\$8,780,775	\$5,921,402	\$8,880,809	\$5,709,064	\$6,837,092
Los Angeles	\$10,525,846	\$5,560,964	\$5,985,996	\$7,357,602	\$5,517,797	\$3,226,094	\$3,141,720	\$3,961,870
Maritime Academy	\$1,093,858	\$1,918,837	\$1,596,985	\$1,536,560	\$1,722,858	\$2,403,370	\$1,990,331	\$2,038,853
Monterey Bay	\$3,565,397	\$4,657,111	\$5,768,245	\$4,663,584	\$3,692,736	\$4,191,128	\$6,113,039	\$4,665,634
San Bernardino	\$5,043,977	\$2,928,520	\$4,031,363	\$4,001,287	\$4,499,859	\$2,841,305	\$3,133,509	\$3,491,558
San Marcos	\$3,093,646	\$2,775,288	\$4,213,983	\$3,360,972	\$3,987,777	\$2,228,741	\$2,282,904	\$2,833,141
Stanislaus	\$2,675,268	\$1,956,505	\$2,358,933	\$2,330,235	\$2,241,782	\$1,532,415	\$1,882,501	\$1,885,566
<b>PEER GROUP I TOTAL</b>	<b>\$48,680,870</b>	<b>\$46,896,354</b>	<b>\$45,465,873</b>	<b>\$47,014,366</b>	<b>\$39,742,817</b>	<b>\$41,159,434</b>	<b>\$36,173,752</b>	<b>\$39,025,334</b>
<b>GROUP II</b>								
Chico	\$7,114,192	\$6,644,590	\$7,564,497	\$7,107,760	\$6,423,622	\$6,276,275	\$4,299,497	\$5,666,465
Fullerton	\$10,629,964	\$8,486,669	\$7,294,986	\$8,803,873	\$11,654,888	\$11,121,402	\$9,930,554	\$10,902,281
Northridge	\$13,384,946	\$10,742,822	\$11,399,521	\$11,842,430	\$12,529,565	\$9,065,563	\$8,975,525	\$10,190,218
Pomona	\$9,168,427	\$58,443,191	\$10,744,565	\$26,118,728	\$5,909,203	\$16,504,641	\$16,435,369	\$12,949,738
Sacramento	\$9,869,219	\$14,251,867	\$11,162,488	\$11,761,191	\$10,626,083	\$7,057,477	\$7,803,312	\$8,495,624
San Francisco	\$16,179,665	\$14,285,633	\$17,016,911	\$15,827,403	\$12,976,643	\$8,633,010	\$9,755,271	\$10,454,975
San José	\$20,404,957	\$25,691,237	\$24,873,168	\$23,656,454	\$17,445,119	\$20,448,082	\$14,259,028	\$17,384,076
Sonoma	\$3,513,931	\$14,042,820	\$12,384,760	\$9,980,504	\$3,268,524	\$7,041,342	\$14,125,513	\$8,145,126
<b>PEER GROUP II TOTAL</b>	<b>\$90,265,301</b>	<b>\$152,588,829</b>	<b>\$102,440,896</b>	<b>\$115,098,342</b>	<b>\$80,833,647</b>	<b>\$86,147,792</b>	<b>\$85,584,069</b>	<b>\$84,188,503</b>
<b>GROUP III</b>								
Fresno	\$15,350,698	\$15,705,657	\$24,672,230	\$18,576,195	\$19,211,324	\$14,111,751	\$13,222,664	\$15,515,246
Long Beach	\$28,945,371	\$26,232,778	\$27,736,945	\$27,638,365	\$12,874,199	\$20,042,216	\$18,132,857	\$17,016,424
San Diego	\$60,871,388	\$71,202,713	\$67,052,356	\$66,375,486	\$54,740,126	\$59,147,550	\$66,823,751	\$60,237,142
San Luis Obispo	\$19,120,243	\$30,186,742	\$27,172,680	\$25,493,222	\$18,247,682	\$17,553,261	\$18,471,478	\$18,090,807
<b>PEER GROUP III TOTAL</b>	<b>\$124,287,700</b>	<b>\$143,327,890</b>	<b>\$146,634,211</b>	<b>\$138,083,267</b>	<b>\$105,073,331</b>	<b>\$110,854,778</b>	<b>\$116,650,750</b>	<b>\$110,859,620</b>
Chancellor's Office	\$1,966,613	\$1,854,431	\$2,469,707	\$2,096,917	\$1,986,613	\$2,352,556	\$1,769,457	\$2,036,209
<b>SYSTEMWIDE TOTAL</b>	<b>\$265,200,484</b>	<b>\$344,667,504</b>	<b>\$297,010,687</b>	<b>\$302,292,892</b>	<b>\$227,636,408</b>	<b>\$240,514,560</b>	<b>\$240,178,028</b>	<b>\$236,109,665</b>

Note 1: Gift Commitments include new gifts, new pledges and testamentary commitments. Gift Receipts reflect assets received by the University in the form of new gifts and pledge payments.

# CHARITABLE GIFT COMMITMENTS

2011/2012 Fiscal Year Chart II

	New Charitable Gifts	New Pledges	Testamentary Commitments	Native American & Local Government Contributions	Total Gift Commitments	2011/2012 General Fund	Gift Commitments as a Percent of the General Fund
<b>GROUP I</b>							
Bakersfield	\$2,409,938	\$235,801	\$0	\$0	\$2,645,739	\$48,741,489	5%
Channel Islands	\$1,464,784	\$523,384	\$0	\$26,772	\$2,014,940	\$44,118,320	5%
Dominguez Hills	\$2,571,747	\$1,426,416	\$100,000	\$23,840	\$4,122,003	\$59,766,882	7%
East Bay	\$2,848,577	\$2,151,938	\$192,000	\$0	\$5,192,515	\$64,021,941	8%
Humboldt	\$3,992,163	\$3,212,981	\$268,640	\$61,387	\$7,535,171	\$59,408,350	13%
Los Angeles	\$2,236,360	\$1,184,636	\$2,565,000	\$0	\$5,985,996	\$96,874,129	6%
Maritime Academy	\$1,152,864	\$19,350	\$424,771	\$0	\$1,596,985	\$21,107,751	8%
Monterey Bay	\$5,242,429	\$525,816	\$0	\$0	\$5,768,245	\$51,339,423	11%
San Bernardino	\$2,698,222	\$842,532	\$200,000	\$290,609	\$4,031,363	\$75,776,878	5%
San Marcos	\$2,109,904	\$1,514,295	\$0	\$589,784	\$4,213,983	\$51,833,482	8%
Stanislaus	\$1,513,607	\$326,073	\$500,000	\$19,253	\$2,358,933	\$46,552,297	5%
<b>PEER GROUP I TOTAL</b>	<b>\$28,240,595</b>	<b>\$11,963,222</b>	<b>\$4,250,411</b>	<b>\$1,011,645</b>	<b>\$45,465,873</b>	<b>\$619,540,942</b>	<b>7%</b>
<b>GROUP II</b>							
Chico	\$4,299,497	\$0	\$3,265,000	\$0	\$7,564,497	\$81,330,222	9%
Fullerton	\$6,021,516	\$1,273,470	\$0	\$0	\$7,294,986	\$116,085,961	6%
Northridge	\$5,928,709	\$562,810	\$4,908,002	\$0	\$11,399,521	\$131,345,346	9%
Pomona	\$5,844,065	\$3,400,500	\$1,500,000	\$0	\$10,744,565	\$96,644,062	11%
Sacramento	\$7,311,165	\$771,323	\$3,080,000	\$0	\$11,162,488	\$107,426,677	10%
San Francisco	\$5,763,439	\$4,154,561	\$7,098,911	\$0	\$17,016,911	\$111,787,439	15%
San José	\$8,531,525	\$5,200,977	\$11,140,666	\$0	\$24,873,168	\$101,113,122	25%
Sonoma	\$8,122,299	\$1,776,569	\$2,484,500	\$1,392	\$12,384,760	\$46,311,423	27%
<b>PEER GROUP II TOTAL</b>	<b>\$51,822,215</b>	<b>\$17,140,210</b>	<b>\$33,477,079</b>	<b>\$1,392</b>	<b>\$102,440,896</b>	<b>\$792,044,252</b>	<b>13%</b>
<b>GROUP III</b>							
Fresno	\$10,270,173	\$8,648,500	\$4,400,000	\$1,353,557	\$24,672,230	\$105,923,822	23%
Long Beach	\$12,448,100	\$7,669,859	\$7,618,986	\$0	\$27,736,945	\$131,395,036	21%
San Diego	\$62,372,907	\$3,962,934	\$705,140	\$11,375	\$67,052,356	\$133,941,246	50%
San Luis Obispo	\$14,422,783	\$1,549,897	\$11,200,000	\$0	\$27,172,680	\$89,543,438	30%
<b>PEER GROUP III TOTAL</b>	<b>\$99,513,963</b>	<b>\$21,831,190</b>	<b>\$23,924,126</b>	<b>\$1,364,932</b>	<b>\$146,634,211</b>	<b>\$460,803,542</b>	<b>32%</b>
Chancellor's Office	\$1,650,707	\$819,000	\$0	\$0	\$2,469,707	\$64,433,802	4%
<b>SYSTEMWIDE TOTAL</b>	<b>\$181,227,480</b>	<b>\$51,753,622</b>	<b>\$61,651,616</b>	<b>\$2,377,969</b>	<b>\$297,010,687</b>	<b>\$1,936,822,538</b>	<b>15%</b>

Note 1: Group I campuses generally have less than 5,000 individual donors, less than 10 full-time professional fundraisers, and less than \$25 million in endowment market value. Group II campuses generally have between 5,000 and 10,000 individual donors, between 10 and 20 full-time professional fundraisers, and between \$25 million and \$50 million in endowment market value. Group III campuses generally have over 10,000 individual donors, over 20 full-time professional fundraisers, and over \$50 million in endowment market value.



## GIFT RECEIPTS BY SOURCE

2011/2012 Fiscal Year Chart III

	Individuals			Organizations			Gift Receipts Total	Total Number Individual Donors
	Alumni	Parents	Other Individuals	Foundations	Corporations	Other Organizations		
<b>GROUP I</b>								
Bakersfield	\$73,354	\$3,050	\$287,983	\$612,754	\$1,779,219	\$162,509	\$2,918,869	785
Channel Islands	\$6,098	\$15,331	\$678,000	\$953,925	\$961,701	\$33,396	\$2,648,451	701
Dominguez Hills	\$175,153	\$100	\$224,065	\$722,752	\$2,104,631	\$47,583	\$3,274,284	1,509
East Bay	\$342,549	\$11,050	\$285,507	\$1,810,299	\$605,706	\$23,969	\$3,079,080	1,529
Humboldt	\$797,989	\$349,831	\$1,188,404	\$876,578	\$1,734,356	\$761,906	\$5,709,064	7,972
Los Angeles	\$326,949	\$820	\$470,879	\$835,443	\$660,585	\$847,044	\$3,141,720	3,309
Maritime Academy	\$514,109	\$38,834	\$174,203	\$102,467	\$393,572	\$767,146	\$1,990,331	523
Monterey Bay	\$30,954	\$8,605	\$2,514,639	\$2,702,988	\$759,013	\$96,840	\$6,113,039	5,702
San Bernardino	\$282,827	\$32,782	\$1,109,553	\$476,422	\$1,080,669	\$151,256	\$3,133,509	2,812
San Marcos	\$37,308	\$35,125	\$446,207	\$883,352	\$803,807	\$77,105	\$2,282,904	1,199
Stanislaus	\$79,550	\$570	\$366,252	\$342,537	\$983,746	\$109,846	\$1,882,501	1,717
<b>PEER GROUP I TOTAL</b>	<b>\$2,666,840</b>	<b>\$496,098</b>	<b>\$7,745,692</b>	<b>\$10,319,517</b>	<b>\$11,867,005</b>	<b>\$3,078,600</b>	<b>\$36,173,752</b>	<b>27,758</b>
<b>GROUP II</b>								
Chico	\$1,042,245	\$153,781	\$1,007,774	\$412,231	\$1,443,573	\$239,893	\$4,299,497	14,075
Fullerton	\$2,627,210	\$136,613	\$1,101,100	\$2,274,036	\$3,210,104	\$581,491	\$9,930,554	6,479
Northridge	\$1,124,154	\$154,954	\$1,217,442	\$3,885,438	\$2,440,868	\$152,669	\$8,975,525	6,283
Pomona	\$2,600,720	\$42,163	\$1,795,899	\$8,943,743	\$939,472	\$2,113,372	\$16,435,369	4,851
Sacramento	\$553,338	\$1,850	\$4,898,461	\$1,203,392	\$844,505	\$301,766	\$7,803,312	32,335
San Francisco	\$2,517,182	\$105,165	\$1,343,608	\$2,807,373	\$2,431,647	\$550,296	\$9,755,271	6,940
San José	\$2,912,673	\$39,335	\$2,067,095	\$6,513,597	\$2,599,059	\$127,269	\$14,259,028	12,496
Sonoma	\$209,345	\$58,535	\$7,294,442	\$5,978,816	\$491,777	\$92,598	\$14,125,513	2,103
<b>PEER GROUP II TOTAL</b>	<b>\$13,586,867</b>	<b>\$692,396</b>	<b>\$20,725,821</b>	<b>\$32,018,626</b>	<b>\$14,401,005</b>	<b>\$4,159,354</b>	<b>\$85,584,069</b>	<b>85,562</b>
<b>GROUP III</b>								
Fresno	\$3,296,700	\$87,436	\$2,221,774	\$3,980,972	\$3,505,074	\$130,708	\$13,222,664	10,187
Long Beach	\$2,571,617	\$708,779	\$6,692,859	\$3,275,142	\$3,972,186	\$912,274	\$18,132,857	24,589
San Diego	\$14,414,107	\$579,468	\$24,334,891	\$15,418,509	\$9,823,430	\$2,253,346	\$66,823,751	62,169
San Luis Obispo	\$3,650,132	\$1,310,998	\$1,361,424	\$3,612,947	\$7,524,117	\$1,011,860	\$18,471,478	13,904
<b>PEER GROUP III TOTAL</b>	<b>\$23,932,556</b>	<b>\$2,686,681</b>	<b>\$34,610,948</b>	<b>\$26,287,570</b>	<b>\$24,824,807</b>	<b>\$4,308,188</b>	<b>\$116,650,750</b>	<b>110,849</b>
Chancellor's Office	\$0	\$0	\$45,238	\$1,114,403	\$594,620	\$15,196	\$1,769,457	25
<b>SYSTEMWIDE TOTAL</b>	<b>\$40,186,263</b>	<b>\$3,875,175</b>	<b>\$63,127,699</b>	<b>\$69,740,116</b>	<b>\$51,687,437</b>	<b>\$11,561,338</b>	<b>\$240,178,028</b>	<b>224,194</b>

Note 1: Number of Individual Donors includes alumni, parents, faculty, staff, students, and friends of the University.

# GIFT RECEIPTS BY PURPOSE

2011/2012 Fiscal Year Chart IV

	Current Programs		Capital Purposes				Deferred Gifts	Gift Receipts Total
	Unrestricted	Restricted	Campus Improvements: Property, Buildings and Equipment	Unrestricted	Restricted	Loan Funds		
<b>GROUP I</b>								
Bakersfield	\$36,760	\$2,525,861	\$163,687	\$0	\$192,561	\$0	\$0	\$2,918,869
Channel Islands	\$235,896	\$2,121,344	\$250,000	\$0	\$41,211	\$0	\$0	\$2,648,451
Dominguez Hills	\$1,028,005	\$1,848,867	\$924	\$0	\$386,488	\$0	\$10,000	\$3,274,284
East Bay	\$102,438	\$1,798,619	\$0	\$0	\$1,178,023	\$0	\$0	\$3,079,080
Humboldt	\$342,761	\$4,705,956	\$23,000	\$0	\$632,347	\$0	\$5,000	\$5,709,064
Los Angeles	\$268,945	\$2,358,495	\$225,450	\$0	\$288,830	\$0	\$0	\$3,141,720
Maritime Academy	\$560,477	\$875,187	\$338,586	\$0	\$191,081	\$0	\$25,000	\$1,990,331
Monterey Bay	\$193,660	\$3,392,915	\$43,852	\$0	\$1,157,612	\$0	\$1,325,000	\$6,113,039
San Bernardino	\$39,203	\$2,425,439	\$419,018	\$0	\$249,849	\$0	\$0	\$3,133,509
San Marcos	\$65,187	\$1,462,588	\$792	\$0	\$754,337	\$0	\$0	\$2,282,904
Stanislaus	\$35,804	\$1,510,151	\$0	\$0	\$336,446	\$100	\$0	\$1,882,501
<b>PEER GROUP I TOTAL</b>	<b>\$2,909,136</b>	<b>\$25,025,422</b>	<b>\$1,465,309</b>	<b>\$0</b>	<b>\$5,408,785</b>	<b>\$100</b>	<b>\$1,365,000</b>	<b>\$36,173,752</b>
<b>GROUP II</b>								
Chico	\$417,403	\$1,670,908	\$0	\$111,580	\$2,099,606	\$0	\$0	\$4,299,497
Fullerton	\$94,389	\$6,194,763	\$486,186	\$0	\$3,000,646	\$0	\$154,570	\$9,930,554
Northridge	\$1,039,120	\$5,345,647	\$872,537	\$0	\$1,708,221	\$0	\$10,000	\$8,975,525
Pomona	\$161,717	\$5,152,606	\$1,984,134	\$0	\$8,461,912	\$0	\$675,000	\$16,435,369
Sacramento	\$144,486	\$6,824,551	\$160,937	\$0	\$653,338	\$0	\$20,000	\$7,803,312
San Francisco	\$392,330	\$5,972,658	\$2,084,125	\$0	\$1,281,158	\$0	\$25,000	\$9,755,271
San José	\$363,867	\$8,028,950	\$26,332	\$0	\$5,246,655	\$0	\$593,224	\$14,259,028
Sonoma	\$68,329	\$1,979,443	\$9,108,134	\$0	\$2,914,607	\$0	\$55,000	\$14,125,513
<b>PEER GROUP II TOTAL</b>	<b>\$2,681,641</b>	<b>\$41,169,526</b>	<b>\$14,722,385</b>	<b>\$111,580</b>	<b>\$25,366,143</b>	<b>\$0</b>	<b>\$1,532,794</b>	<b>\$85,584,069</b>
<b>GROUP III</b>								
Fresno	\$184,052	\$10,111,001	\$629,806	\$0	\$2,272,805	\$0	\$25,000	\$13,222,664
Long Beach	\$827,793	\$11,084,686	\$666,150	\$0	\$3,108,361	\$0	\$2,445,867	\$18,132,857
San Diego	\$60,500	\$45,072,958	\$0	\$0	\$4,897,865	\$0	\$16,792,428	\$66,823,751
San Luis Obispo	\$892,310	\$9,657,466	\$3,349,755	\$0	\$4,358,559	\$0	\$213,388	\$18,471,478
<b>PEER GROUP III TOTAL</b>	<b>\$1,964,655</b>	<b>\$75,926,111</b>	<b>\$4,645,711</b>	<b>\$0</b>	<b>\$14,637,590</b>	<b>\$0</b>	<b>\$19,476,683</b>	<b>\$116,650,750</b>
Chancellor's Office	\$135,784	\$1,576,673	\$0	\$0	\$57,000	\$0	\$0	\$1,769,457
<b>SYSTEMWIDE TOTAL</b>	<b>\$7,691,216</b>	<b>\$143,697,732</b>	<b>\$20,833,405</b>	<b>\$111,580</b>	<b>\$45,469,518</b>	<b>\$100</b>	<b>\$22,374,477</b>	<b>\$240,178,028</b>

# CHARITABLE GIFT COMPARISONS

2011/2012 Fiscal Year Chart V

	2009/2010	2010/2011	2011/2012
<b>SOURCE OF SUPPORT</b>			
<b>ORGANIZATIONS</b>			
Alumni	\$43,128,862	\$38,970,711	\$40,186,263
Parents	\$3,440,584	\$3,490,399	\$3,875,175
Other Individuals	\$58,579,892	\$56,838,970	\$63,127,699
<b>INDIVIDUALS TOTAL</b>	<b>\$105,149,338</b>	<b>\$99,300,080</b>	<b>\$107,189,137</b>
Foundations	\$55,709,160	\$76,022,095	\$69,740,116
Corporations	\$51,466,351	\$52,992,403	\$51,687,437
Other Organizations	\$15,311,559	\$12,200,062	\$11,561,338
<b>ORGANIZATIONS TOTAL</b>	<b>\$122,487,070</b>	<b>\$141,214,560</b>	<b>\$132,988,891</b>
<b>SOURCE OF SUPPORT TOTAL</b>	<b>\$227,636,408</b>	<b>\$240,514,560</b>	<b>\$240,178,028</b>
<b>GIFT PURPOSES</b>			
<b>CURRENT OPERATIONS</b>			
Unrestricted	\$5,875,655	\$5,930,555	\$7,691,216
Restricted	\$140,683,076	\$145,690,566	\$143,697,732
<b>CURRENT OPERATIONS TOTAL</b>	<b>\$146,558,731</b>	<b>\$151,621,122</b>	<b>\$151,388,947</b>
<b>CAPITAL PURPOSES</b>			
Property, Buildings and Equipment	\$19,423,930	\$21,468,513	\$20,833,405
Endowment: Unrestricted	\$213,809	\$2,647,159	\$111,580
Endowment: Restricted	\$49,406,744	\$51,877,669	\$45,469,518
Loan Funds	\$645	\$3,100	\$100
<b>CAPITAL PURPOSES TOTAL</b>	<b>\$69,045,128</b>	<b>\$75,996,441</b>	<b>\$66,414,603</b>
Deferred Gifts	\$12,032,549	\$12,896,996	\$22,374,477
<b>GIFT PURPOSES TOTAL</b>	<b>\$227,636,408</b>	<b>\$240,514,560</b>	<b>\$240,178,028</b>

	2009/2010 Market Value	2010/2011 Market Value	2011/2012 Market Value	2010/2011 to 2011/2012 Comparison		2009/2010 Investment Return Rate	2010/2011 Investment Return Rate	2011/2012 Investment Return Rate	Three Year Average	2011/2012 Gifts to Endowment	2011/2012 Endowment Distribution
				Amount	Percentage						
<b>GROUP I</b>											
Bakersfield	\$14,542,510	\$17,887,341	\$17,961,094	\$73,753	0.41%	13.16%	22.42%	0.00%	11.86%	\$192,561	\$233,008
Channel Islands	\$7,770,469	\$9,890,089	\$9,226,137	-\$663,952	-6.71%	13.90%	22.70%	-3.90%	10.90%	\$41,211	\$299,745
Dominguez Hills	\$7,871,105	\$9,051,950	\$10,159,219	\$1,107,269	12.23%	14.80%	17.22%	2.58%	11.53%	\$386,488	\$235,376
East Bay	\$8,518,478	\$10,022,562	\$10,368,835	\$346,273	3.45%	12.41%	20.32%	-1.94%	10.26%	\$1,178,023	\$355,537
Humboldt	\$18,512,477	\$22,006,713	\$22,269,786	\$263,073	1.20%	9.00%	16.00%	0.10%	8.37%	\$632,347	\$823,234
Los Angeles	\$15,664,827	\$19,240,160	\$18,559,176	-\$680,984	-3.54%	12.80%	22.50%	-3.60%	10.57%	\$288,830	\$645,616
Maritime Academy	\$2,268,000	\$3,288,731	\$3,720,281	\$431,550	13.12%	18.60%	14.68%	-2.90%	10.13%	\$191,081	\$86,961
Monterey Bay	\$9,554,374	\$13,022,219	\$14,019,682	\$997,463	7.66%	17.70%	22.70%	-1.30%	13.03%	\$1,157,612	\$433,104
San Bernardino	\$16,426,507	\$19,681,260	\$19,170,823	-\$510,437	-2.59%	15.40%	20.10%	-3.40%	10.70%	\$249,849	\$595,857
San Marcos	\$14,610,064	\$17,921,290	\$17,262,634	-\$658,656	-3.68%	14.20%	25.40%	-3.00%	12.20%	\$754,337	\$540,372
Stanislaus	\$8,873,009	\$10,518,102	\$9,232,436	-\$1,285,666	-12.22%	-1.00%	8.53%	-1.92%	1.87%	\$336,446	\$1,540,577
<b>PEER GROUP I TOTAL</b>	<b>\$124,611,820</b>	<b>\$152,530,417</b>	<b>\$151,950,103</b>	<b>-\$580,314</b>	<b>-0.38%</b>	<b>12.45%</b>	<b>20.03%</b>	<b>-1.70%</b>	<b>10.26%</b>	<b>\$5,408,785</b>	<b>\$5,789,387</b>
<b>GROUP II</b>											
Chico	\$38,957,678	\$43,021,055	\$42,174,342	-\$846,713	-1.97%	9.70%	16.80%	-0.80%	8.57%	\$2,211,186	\$1,941,315
Fullerton	\$23,987,020	\$32,346,565	\$34,276,674	\$1,930,109	5.97%	13.44%	20.45%	-4.17%	9.91%	\$3,000,646	\$961,747
Northridge	\$54,881,873	\$68,103,000	\$63,639,683	-\$4,463,317	-6.55%	12.00%	21.90%	-2.78%	10.37%	\$1,708,221	\$5,858,095
Pomona	\$32,698,955	\$49,983,520	\$55,579,506	\$5,595,986	11.20%	15.63%	23.96%	-1.38%	12.74%	\$8,461,912	\$2,411,642
Sacramento	\$25,539,959	\$28,820,010	\$28,316,872	-\$503,138	-1.75%	7.70%	13.00%	-1.00%	6.57%	\$653,338	\$759,319
San Francisco	\$49,018,563	\$48,953,667	\$51,203,719	\$2,250,052	4.6%	9.66%	7.74%	2.17%	6.52%	\$1,281,158	\$1,271,007
San José	\$55,110,262	\$73,099,988	\$74,813,247	\$1,713,259	2.34%	15.50%	22.82%	-1.23%	12.36%	\$5,246,655	\$1,920,115
Sonoma	\$27,974,087	\$34,221,426	\$35,018,336	\$796,910	2.33%	9.30%	21.00%	-4.00%	8.77%	\$2,914,607	\$1,036,002
<b>PEER GROUP II TOTAL</b>	<b>\$308,168,397</b>	<b>\$378,549,231</b>	<b>\$385,022,379</b>	<b>\$6,473,148</b>	<b>1.71%</b>	<b>11.86%</b>	<b>19.06%</b>	<b>-1.51%</b>	<b>9.80%</b>	<b>\$25,477,723</b>	<b>\$16,159,242</b>
<b>GROUP III</b>											
Fresno	\$111,566,395	\$127,292,712	\$129,447,827	\$2,155,115	1.69%	12.04%	17.81%	-0.63%	9.74%	\$2,272,805	\$5,512,235
Long Beach	\$36,563,866	\$46,269,017	\$44,084,299	-\$2,184,718	-4.72%	15.10%	22.80%	-2.40%	11.83%	\$3,108,361	\$3,078,201
San Diego	\$109,401,000	\$135,191,000	\$136,408,000	\$1,217,000	0.90%	16.22%	22.44%	-1.20%	12.49%	\$4,897,865	\$3,968,700
San Luis Obispo	\$146,772,634	\$173,419,476	\$168,371,557	-\$5,047,919	-2.91%	15.50%	23.30%	-0.20%	12.87%	\$4,358,559	\$6,894,111
<b>PEER GROUP III TOTAL</b>	<b>\$404,303,895</b>	<b>\$482,172,205</b>	<b>\$478,311,683</b>	<b>-\$3,860,522</b>	<b>-0.80%</b>	<b>14.70%</b>	<b>21.56%</b>	<b>-0.80%</b>	<b>11.82%</b>	<b>\$14,637,590</b>	<b>\$19,453,247</b>
Chancellor's Office	\$9,056,686	\$11,140,934	\$10,933,190	-\$207,744	-1.86%	14.94%	18.64%	-0.95%	10.88%	\$57,000	\$290,340
<b>SYSTEMWIDE TOTAL</b>	<b>\$846,140,798</b>	<b>\$1,024,392,787</b>	<b>\$1,026,217,355</b>	<b>\$1,824,568</b>	<b>0.18%</b>	<b>13.34%</b>	<b>20.38%</b>	<b>-1.20%</b>	<b>10.84%</b>	<b>\$45,581,098</b>	<b>\$41,692,216</b>

Note 1: Investment returns are reported as net of investment fees.

Note 2: Peer Group and Systemwide investment returns are presented as dollar-weighted averages.

## ALUMNI

## 2011/2012 Fiscal Year Chart VII

	Number of Addressable Alumni	Alumni Association Members			Membership Dues Collected	Alumni Solicited	Alumni Donors	Total Alumni Contributions
		Annual	Lifetime	Total				
<b>GROUP I</b>								
Bakersfield	37,644	37,415	228	37,643	\$3,500	5,565	259	\$73,354
Channel Islands	5,000	1,145	95	1,240	\$6,195	4,972	29	\$6,098
Dominguez Hills	77,437	0	3,786	3,786	\$0	72,113	1,080	\$175,153
East Bay	95,873	2,144	1,425	3,569	\$19,710	90,005	1,090	\$342,549
Humboldt	48,658	916	2,739	3,655	\$20,491	41,662	3,810	\$797,989
Los Angeles	126,142	5,645	1,663	7,308	\$75,836	43,338	2,709	\$326,949
Maritime Academy	4,397	0	4,397	4,397	\$0	3,971	307	\$514,109
Monterey Bay	6,924	0	1,689	1,689	\$3,600	6,902	106	\$30,954
San Bernardino	61,533	3,215	750	3,965	\$20,185	47,718	963	\$282,827
San Marcos	27,493	1,120	214	1,334	\$30,700	25,798	181	\$37,308
Stanislaus	49,999	0	0	0	\$0	23,934	705	\$79,550
<b>PEER GROUP I Total</b>	<b>541,100</b>	<b>51,600</b>	<b>16,986</b>	<b>68,586</b>	<b>\$180,217</b>	<b>365,978</b>	<b>11,239</b>	<b>\$2,666,840</b>
<b>GROUP II</b>								
Chico	135,554	1,594	784	2,378	\$68,666	102,226	7,199	\$1,042,245
Fullerton	207,330	5,064	2,339	7,403	\$135,781	196,857	3,608	\$2,627,210
Northridge	282,954	10,894	1,327	12,221	\$83,909	171,315	3,204	\$1,124,154
Pomona	115,006	1,368	2,044	3,412	\$23,435	87,651	3,484	\$2,600,720
Sacramento	193,744	3,408	2,686	6,094	\$135,315	147,200	3,748	\$553,338
San Francisco	261,210	0	5,953	5,953	\$52,903	43,467	3,951	\$2,517,182
San José	194,878	6,480	5,411	11,891	\$210,150	184,871	4,144	\$2,912,673
Sonoma	59,941	216	1,279	1,495	\$14,450	16,998	392	\$209,345
<b>PEER GROUP II Total</b>	<b>1,450,617</b>	<b>29,024</b>	<b>21,823</b>	<b>50,847</b>	<b>\$724,609</b>	<b>950,585</b>	<b>29,730</b>	<b>\$13,586,867</b>
<b>GROUP III</b>								
Fresno	195,031	2,410	3,840	6,250	\$26,325	135,953	6,087	\$3,296,700
Long Beach	252,130	37,221	769	37,990	\$63,703	158,031	8,463	\$2,571,617
San Diego	268,020	1,900	6,457	8,357	\$375,000	108,761	10,858	\$14,414,107
San Luis Obispo	150,426	215	10,008	10,223	\$280	36,091	7,413	\$3,650,132
<b>PEER GROUP III Total</b>	<b>865,607</b>	<b>41,746</b>	<b>21,074</b>	<b>62,820</b>	<b>\$465,308</b>	<b>438,836</b>	<b>32,821</b>	<b>\$23,932,556</b>
<b>SYSTEMWIDE Total</b>	<b>2,857,324</b>	<b>122,370</b>	<b>59,883</b>	<b>182,253</b>	<b>\$1,370,134</b>	<b>1,755,399</b>	<b>73,790</b>	<b>\$40,186,263</b>

Note 1: Alumni associations have discontinued a dues paying program at the following campuses: Bakersfield, Dominguez Hills, Maritime Academy, San Luis Obispo, and Stanislaus.