

AGENDA

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Meeting: 4:15 p.m., Tuesday, March 13, 2007
Glenn S. Dumke Auditorium

Carol R. Chandler, Chair
Craig R. Smith, Vice Chair
Jeffrey L. Bleich
Debra S. Farar
Kenneth Fong
Raymond W. Holdsworth
Andrew LaFlamme
A. Robert Linscheid
Lou Monville
Craig R. Smith
Glen O. Toney
Kyriakos Tsakopoulos

Consent Item

Approval of Meeting Minutes of January 23, 2007

Discussion Items

1. Naming of an Academic Entity – San José State University, *Action*
2. Naming of a Facility – California State University, Fresno, *Action*
3. Measuring Advancement, *Information*

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

January 23, 2007

Members Present

Carol R. Chandler, Chair
Craig R. Smith, Vice Chair
Roberta Achtenberg, Chair of the Board
Jeffrey L. Bleich
Debra S. Farar
Ray Holdsworth
Andrew LaFlamme
A. Robert Linscheid
Lou Monville
Charles B. Reed, Chancellor
Craig R. Smith
Glen O. Toney

Approval of Minutes

The minutes of November 14, 2006 were approved.

Donor Commendation – Humboldt State University

Trustee Chandler asked Mr. Richard West, executive vice chancellor and chief financial officer, to present the request to commend Kenneth L. Fisher for his support of Humboldt State University.

Mr. West stated that the commendation recognizes Mr. Fisher for his support of the Kenneth L. Fisher Chair in Redwood Forest Ecology, the first endowed chair at Humboldt State University, and expresses appreciation to Mr. Fisher for his exemplary leadership and generosity to Humboldt State University. Mr. West commented that Mr. Fisher graduated from Humboldt State University in 1972 and is founder of Fisher Investments, where he is the chief executive officer and chief investment officer. Mr. Fisher's endowed gift of approximately \$3.6 million will provide about \$90,000 annually to support research in redwood ecology in perpetuity.

Dr. Rollin C. Richmond, President, Humboldt State University, noted that the campus was very fortunate to bring together the synergistic components to create this endowed chair, the first of its kind in the country devoted to the study of Forest Ecology. With the help of Professor Sillett and Mr. Fisher, and his \$35 billion global money management firm, President Richmond

acknowledged Mr. Fisher's capacity, interest, and willingness to invest in his alma mater for the sake of taking forest ecology to new proverbial heights. Mr. Fisher will soon be recognized as a "Distinguished Alumnus of Humboldt State University" for his achievements. President Richmond concluded by saying that Humboldt State University appreciates and eagerly anticipates the discoveries the Fisher Chair will accomplish and appreciates what it represents with its cutting edge research.

The committee recommended approval of the proposed resolution (RIA 01-07-01).

Chancellor Reed noted that the California State University is extremely grateful for all of Mr. Fisher's support and appreciates everything he does for the university. Mr. Fisher thanked the board and explained that since childhood he has been in love with redwoods and this experience was too great to pass by. Humboldt is in the right place to study redwoods and the campus lends its way perfectly to do the research. He said that it is a fun thing for him to be able to be a part of this and he is very appreciative.

Dr. Reed, presented Mr. Fisher with a token of the university's gratitude in recognition of his visionary leadership and support of Humboldt State University's students, faculty, and future.

Naming of an Academic Entity – California State University, Fresno

Trustee Chandler asked Mr. West to present the request to name the Real Estate Center in the Craig School of Business at the California State University, Fresno as the Arnold and Dianne Gazarian Real Estate Center.

Mr. West stated that the naming recognizes a \$1.5 million commitment by Arnold and Diane Gazarian to provide operating funds for the Real Estate Center in the Craig School of Business. Dr. Gazarian graduated from the University of California, Berkeley and the University of California, San Francisco where he received his DDS. Mrs. Gazarian is the only child of the late Isabel and Haig Berberian of Modesto, whom the Haig and Isabel Berberian Endowed Chair in Armenian Studies at California State University, Fresno is named.

Dr. John Welty, President, CSU Fresno, acknowledged the Gazarians as longtime friends of the university and residents of the community. He noted that real estate issues are extremely important to the central valley and this gift will help keep it in the spotlight. Unfortunately, the Gazarians were not present for the meeting, but President Welty will express to them the appreciation of the university and the Board of Trustees.

The committee recommended approval of the proposed resolution (RIA 01-07-02).

Approval of the 2005-2006 Annual Report on External Resources

Trustee Chandler explained the next item was the 2005-2006 Annual Report on External Support. As required by the Education Code, the report is submitted to the California Postsecondary Education Commission, the Joint Legislative Budget Committee, and the California Department of Finance. She called attention to the report distributed earlier and asked Mr. West to continue with presentation of the item.

Before the report, Mr. West introduced Ms. Theresa Mendoza who joined the advancement team as Senior Advisor for Campus Advancement Programs. Prior to this appointment, she successfully served as Vice President for University Advancement at San Diego State University for the past nine years developing an outstanding program. In this new role, she will be responsible for providing expanded services to campus Presidents and Vice Presidents in the areas of leadership development, campaign readiness, volunteer management, and multi-campus funding opportunities. Ms. Mendoza commented that it is an honor and pleasure to serve the CSU in this role. She sees the campus opportunities as extraordinary ones and will work to tailor programs appropriate to each campus's progress.

Mr. West asked Ms. Lori Redfearn, assistant vice chancellor of advancement services, to present the External Resources Report data. Utilizing a PowerPoint presentation, Ms. Redfearn provided a comprehensive overview of the challenges, successes, and overall status of the university's external support activities during the 2005-2006 year.

Ms. Redfearn noted that some of the CSU campuses had their best fundraising year ever. Others were challenged in their efforts mostly due to leadership transitions and budget constraints. Overall, the university raised \$1.3 billion in private support with nearly \$286 million from gift commitments. Gift commitments were comparable to 12 percent of the state general fund allocation. The number of individual donors has increased by approximately ten thousand individuals each year for the past three years.

Efforts to improve endowment management are going well. The endowment taskforce has recommended that the Chancellor's Office seek an enterprise service agreement to provide endowment investment management services. The enterprise contract will provide smaller endowments under management with access to broader asset diversification and lower investment management fees.

There was a brief discussion about the condition of alumni giving compared to other universities and a question about the CSU's investment into the fundraising program. These topics will be covered in greater detail at the March committee meeting.

The committee recommended approval of the proposed resolution (RIA 01-07-03).

Advancement Update

Mr. West reported that each year the Council for Advancement and Support of Education (CASE) honors superior achievement in the field of university advancement. He noted that as in prior years, the CSU made an impressive showing with a number of awardees from several CSU campuses. He encouraged the Trustees to refer to the list of awardees in their agenda materials.

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

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Naming of an Academic Entity – San José State University

Presentation by:

Richard P. West
Executive Vice Chancellor and
Chief Financial Officer

Summary

This item will consider naming the College of Engineering at San José State University as the Charles W. Davidson College of Engineering.

This proposal, submitted by San José State University, meets the criteria and other conditions specified in the Board of Trustees Policy on Naming California State University Academic Entities, including approval by the system review panel and the executive committee of the campus Academic Senate.

Background

The proposed naming recognizes the \$15 million gift commitment by Mr. Charles W. Davidson to San José State University's College of Engineering. The gift will establish endowed professorships and strategic initiatives in the areas of student and faculty development, leading edge technology, innovation and globalization.

Mr. Davidson earned a B.S. degree in Civil Engineering from San José State University in 1957. He has a long history of engagement with the University. Most recently, he served as the first Chair of the Tower Foundation. His leadership and dedication to community service have earned him several awards. Mr. Davidson was the 2004 recipient of the Tower Award, the highest honor given to supporters of San José State University and the recipient of the College of Engineering Distinguished Alumni Award in 1991.

Mr. Davidson is the founder of five companies: DKB Homes, one of the largest residential real estate developers in California; L & D Construction; DKD Property Management; Davidson Homes; and the Charles W. Davidson Company. According to Mr. Davidson, "one's responsibility to others is very simple: live by the Golden Rule." As a child of the Depression Era, his proudest achievement was building 5,000 subsidized housing units at a time when it was not popular to do so.

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While his businesses are a vital part of the area economy, Mr. Davidson is also a role model in giving back to the community. His foundation, created in 1992, supports the arts, higher education and human services. His dedication to San José State University goes well beyond the establishment of endowed scholarships and professorships. He is a Spartan to the core and has rarely missed a football game since 1952.

Recommended Action

The following resolution is recommended for approval:

RESOLVED, By the Board of Trustees of the California State University, that the College of Engineering at San José State University be named the Charles W. Davidson College of Engineering.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Naming of a Facility – California State University, Fresno

Presentation By:

Richard P. West
Executive Vice Chancellor and
Chief Financial Officer

Summary

This item will consider naming the tower of the Henry Madden Library at California State University, Fresno as the Table Mountain Rancheria Tower.

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

Background

The proposed naming recognizes the \$10 million gift commitment by the Chukchansi/Mono people of Table Mountain Rancheria to California State University, Fresno's Henry Madden Library. The gift is the largest single cash gift to Fresno State in its history.

The proposed addition to the Madden Library is not only intended to remedy space deficiencies, but more importantly, allow for the integration of library services in a way that is more responsive to the needs of students and faculty. Furthermore, the project creates the ability to introduce state of the art information technology systems, and rethink the collections and overall role of the library within the larger framework of the campus. As modes of teaching and scholarly research continue to change, new demands have been placed on library functions and services. This project affords the opportunity to create a major resource with a superb collection, facilities and technology infrastructure required to maintain the Madden Library as the epitome of academic excellence not only for the campus but for the entire region as well.

For thousands of years, Native American people have made their homes near the San Joaquin River at "Shish Liu," the Chukchansi and Gashowu word for the Table Mountain area, drawn by the awesome salmon migration that used to occur before the building of the Friant Dam. Throughout the economic changes that passed through time, the Chukchansi/Mono people of

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Table Mountain Rancheria have maintained a strong heritage and dedication to the land through traditional food, language and cultural practices.

The members of Table Mountain Rancheria feel blessed by the strong familial ties of their tribal community and their ability to contribute to the improvement of the Central Valley. The tribe places great value in education and actively encourages its youth to pursue college. The support of the Henry Madden Library project at Fresno State is a natural extension of those values.

Recommended Action

The following resolution is recommended for approval:

RESOLVED, By the Board of Trustees of the California State University, that the tower of the Henry Madden Library at California State University, Fresno be named the Table Mountain Rancheria Tower.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Measuring Advancement

Presentation By

Lori A. Redfearn
Assistant Vice Chancellor
Advancement Services

Theresa Mendoza
Senior Advisor
Campus Advancement Programs

Summary

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

Background

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

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

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

CSU Advancement Classification Model

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

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

Group II campuses typically have ten to twenty full-time professional fundraisers, 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 professional fundraisers, 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	2003/04	2004/05	2005/06	Three Year Average
<i>Group I</i>				
Bakersfield	2%	11%	13%	9%
Channel Islands	6%	7%	19%	11%
Dominguez Hills	4%	4%	2%	3%
East Bay	4%	14%	4%	8%
Humboldt	9%	7%	7%	8%
Los Angeles	6%	4%	4%	5%
Maritime Academy	14%	4%	7%	9%
Monterey Bay	18%	7%	5%	10%
San Bernardino	5%	6%	18%	10%
San Marcos	4%	13%	9%	9%
Stanislaus	4%	5%	4%	5%
<i>Group I Average</i>	7%	8%	8%	8%

<i>Group II</i>				
Chico	6%	4%	9%	7%
Fullerton	6%	7%	10%	8%
Northridge	16%	10%	12%	13%
Pomona	4%	8%	5%	6%
Sacramento	5%	5%	11%	7%
San Francisco	13%	15%	6%	12%
San Jose	8%	18%	18%	15%
Sonoma	26%	21%	17%	22%
<i>Group II Average</i>	11%	11%	11%	11%

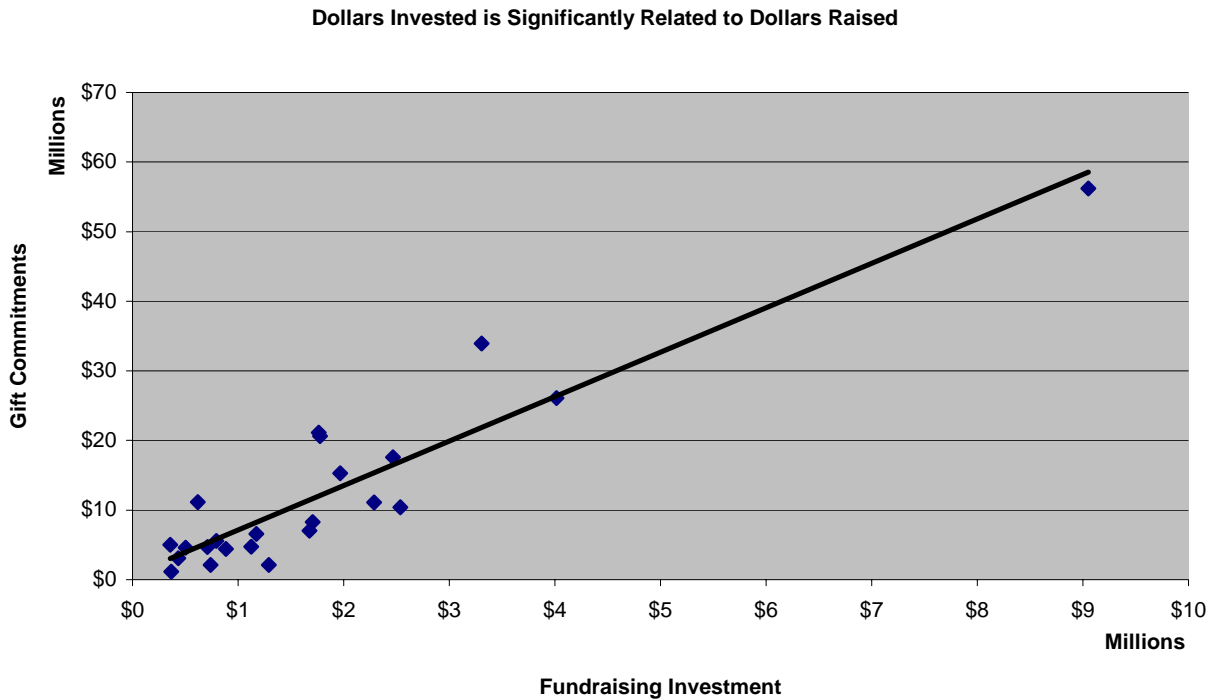
<i>Group III</i>				
Fresno	14%	10%	17%	14%
Long Beach	19%	15%	11%	15%
San Diego	34%	32%	25%	31%
San Luis Obispo	27%	32%	23%	28%
<i>Group III Average</i>	24%	23%	19%	22%
<i>System Average</i>	11%	12%	12%	12%

Investments in Advancement

State general fund and other investments in advancement administration, fundraising, alumni relations, public affairs and communications reached \$86 million in 2005/06 compared to \$79 million in 2004/05.

State general fund and other investments in fundraising increased 10 percent reaching \$44 million in 2005-06 compared to \$40 million in 2004/05. For 2005/06, the net return on fundraising investment in relation to gift commitments of nearly \$286 million was 548%. In 2005/06, the California State University system spent 16 cents to raise a dollar. The median campus cost to raise a dollar was 14 cents. The target range for the cost to raise a dollar is 10 to 20 cents.

The chart below compares the three-year average of gift commitments compared to the three-year average of fundraising investments. With a 92 percent positive correlation between investments in fundraising and resulting gift commitments, the trendline below is a good indicator for understanding the investment necessary to reach fundraising goals.



Goal Matrix

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

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

GOAL MATRIX

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

Actual	Actual	Goal	Goal
04/05	05/06	06/07	07/08

PERFORMANCE INDICATORS

New Gifts	\$ 1,997,292	\$ 4,725,903		
New Pledges	\$ 225,738	\$ 2,137,204		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ 3,400,000	\$ -		
Total Gift Commitments	\$ 5,623,030	\$ 6,863,107	\$8,500,000	\$9,300,000

Charitable Gift Receipts (Gifts and Pledge Payments)

\$ 2,209,129 \$ 5,004,578

Percent of Total for Current Operations	73%	45%
Percent of Total for Endowment	12%	51%
Percent of Total for Campus Improvements	8%	2%
Percent of Total as Planned/Deferred	0%	0%
Percent of Total as Unrestricted	7%	2%

Endowment Market Value	\$ 7,293,000	\$ 10,318,028
Endowment Distribution	\$ 241,307	\$ 369,099

Number of Individual Donors	2,373	2,101	2,795	2,920
Number of Alumni Donors	1,228	1,150	1,475	1,700
Number of Addressable Alumni	22,522	23,047	24,750	25,750
Number of Annual and Life Alumni Paid Memberships	1,236	1,272	1,450	1,600

INVESTMENT INDICATORS

State General Fund **\$ 51,035,500 \$ 54,567,280 \$ 56,204,298 \$ 57,890,427**

Advancement Investment - Sources of Funds

State General Fund	\$604,657	\$685,362	\$707,346	\$ 664,175
Other Sources	\$347,009	\$436,472	\$644,974	\$ 600,000
Total	\$ 951,666	\$ 1,121,834	\$ 1,352,320	\$ 1,264,175

Advancement Investment - Uses of Funds

Fundraising				
State General Fund	\$ 157,550	\$ 199,340		
Other Sources	\$ 277,262	\$ 356,042		
Fundraising Subtotal	\$ 434,812	\$ 555,382		

Alumni Relations

State General Fund	\$ 142,241	\$ 165,535
Other Sources	\$ 20,997	\$ 37,925
Alumni Relations Subtotal	\$ 163,238	\$ 203,460

Public/Community Relations

State General Fund	\$ 160,281	\$ 185,389
Other Sources	\$ 10,646	\$ 11,657
Public/Community Relations Subtotal	\$ 170,927	\$ 197,046

Administration

State General Fund	\$ 144,585	\$ 135,098
Other Sources	\$ 38,104	\$ 30,848
Adminstration Subtotal	\$ 182,689	\$ 165,946

Fundraising Staff FTE (Professional)	3.30	2.85	5.55
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	11%	13%	15%	15.9%
Endowment Market Value as a % of State General Fund	14%	19%		
Net Return on State General Fund Fundraising Investment	3469%	3343%		
State General Fund Fundraising Investment as a % of State General Fund	0.31%	0.37%		
State General Fund Advancement Investment as a % of State General Fund	1.18%	1.26%		
Total Fundraising Investment as a % of State General Fund	0.85%	1.02%		
Total Advancement Investment as a % of State General Fund	1.86%	2.06%		

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

GOAL MATRIX

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

	Actual 04/05	Actual 05/06	Goal 06/07	Goal 07/08
PERFORMANCE INDICATORS				
New Gifts	\$ 1,742,366	\$ 2,346,867		
New Pledges	\$ 59,536	\$ 3,341,721		
Indian and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ -	\$ -		
Total Gift Commitments	\$ 1,801,902	\$ 5,688,588	5,000,000	5,750,000
Charitable Gift Receipts (Gifts and Pledge Payments)				
	\$ 1,961,572	\$ 2,765,296		
Percent of Total for Current Operations	32%	61%		
Percent of Total for Endowment	9%	4%		
Percent of Total for Campus Improvements	38%	19%		
Percent of Total as Planned/Deferred	0%	0%		
Percent of Total as Unrestricted	21%	17%		
Endowment Market Value	\$ 7,648,602	\$ 10,032,000		
Endowment Distribution	\$ 233,677	\$ 341,000		
Number of Individual Donors	498	782	900	1,035
Number of Alumni Donors	105	1,150	1,200	1,500
Number of Addressable Alumni	551	1,307	1,800	2,200
Number of Annual and Life Alumni Paid Memberships	398	293	350	425
INVESTMENT INDICATORS				
State General Fund	\$ 27,288,800	\$ 29,884,210	\$ 30,780,736	\$ 31,704,158
Advancement Investment - Sources of Funds				
State General Fund	\$ 1,186,120	\$ 1,340,428	\$ 1,514,684	\$ 1,711,600
Other Sources	\$ 151,236	\$ 336,170	\$ 400,000	\$ 500,000
Total	\$ 1,337,356	\$ 1,676,598	\$ 1,914,684	\$ 2,211,600
Advancement Investment - Uses of Funds				
Fundraising				
State General Fund	\$ 403,902	\$ 461,454		
Other Sources	\$ 37,809	\$ 84,042		
Fundraising Subtotal	\$ 441,711	\$ 545,496		
Alumni Relations				
State General Fund	\$ 107,287	\$ 144,705		
Other Sources	\$ 37,809	\$ 84,042		
Alumni Relations Subtotal	\$ 145,096	\$ 228,747		
Public/Community Relations				
State General Fund	\$ 402,393	\$ 465,580		
Other Sources	\$ 37,809	\$ 84,042		
Public/Community Relations Subtotal	\$ 440,202	\$ 549,622		
Administration				
State General Fund	\$ 272,538	\$ 268,689		
Other Sources	\$ 37,809	\$ 84,042		
Administration Subtotal	\$ 310,347	\$ 352,731		
Fundraising Staff FTE (Professional)	2.75	3.2	2.75	4.5
COMPARISONS				
Total Philanthropic Productivity as a % of State General Fund	7%	19%	16%	18%
Endowment Market Value as a % of State General Fund	28%	34%		
Net Return on State General Fund Fundraising Investment	346%	1133%		
State General Fund Fundraising Investment as a % of State General Fund	1.48%	1.54%		
State General Fund Advancement Investment as a % of State General Fund	4.35%	4.49%		
Total Fundraising Investment as a % of State General Fund	1.62%	1.83%		
Total Advancement Investment as a % of State General Fund	4.90%	5.61%		

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

GOAL MATRIX

Campus Name: **California State University, Chico**
Group Classification: **2**

Actual	Actual	Goal	Goal
04/05	05/06	06/07	07/08

PERFORMANCE INDICATORS

New Gifts	\$ 3,940,081	\$ 8,561,401		
New Pledges	\$ -	\$ 405,000		
Testamentary Commitments (Revocable Bequests)	\$ -	\$ 227,000		
Native American and Local Government Contributions	\$ 2,410	\$ -		
Total Gift Commitments	\$ 3,940,081	\$ 9,193,401	\$7,500,000	\$8,500,000

Charitable Gift Receipts (New Gifts and Pledge Payments)

	\$ 3,937,671	\$ 8,561,401		
Percent of Total for Current Operations	47%	13%		
Percent of Total for Endowment	53%	28%		
Percent of Total for Campus Improvements	0%	0%		
Percent of Total as Planned/Deferred	0%	55%		
Percent of Total as Unrestricted	0.1%	4.1%		

Endowment Market Value	\$ 29,579,432	\$ 30,840,000		
Endowment Distribution	\$ 1,159,391	\$ 1,161,000		

Number of Individual Donors	9,944	14,410	12,000	13,000
Number of Alumni Donors	6,100	5,894	7,381	6,600
Number of Addressable Alumni	116,133	115,239	120,000	120,000
Number of Annual and Life Alumni Paid Memberships	3,537	3,648	5,175	4,000

INVESTMENT INDICATORS

State General Fund	\$ 100,091,800	\$ 107,406,300	\$ 110,628,489	\$ 113,947,344
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Advancement Investment - Sources of Funds

State General Fund	\$ 1,861,603	\$ 2,643,857	\$ 3,100,000	\$ 2,900,000
Other Sources	\$ 949,288	\$ 462,559	\$ 950,000	\$ 1,000,000
Total	\$ 2,810,891	\$ 3,106,416	\$ 4,050,000	\$ 3,900,000

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 543,659	\$ 1,181,391		
Other Sources	\$ 469,733	\$ 132,021		
Fundraising Subtotal	\$ 1,013,391	\$ 1,313,412		

Alumni Relations

State General Fund	\$ 290,505	\$ 452,692		
Other Sources	\$ 155,504	\$ 199,447		
Alumni Relations Subtotal	\$ 446,009	\$ 652,139		

Public/Community Relations (excluding Governmental Relations)

State General Fund	\$ 373,938	\$ 579,841		
Other Sources	\$ 57,721	\$ 54,857		
Public/Community Relations Subtotal	\$ 431,659	\$ 634,698		

Administration

State General Fund	\$ 653,501	\$ 429,933		
Other Sources	\$ 266,331	\$ 76,234		
Administration Subtotal	\$ 919,833	\$ 506,167		

Fundraising Staff FTE (Professional)	5.57	7.67	10	12
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	4%	9%	7%	7%
Endowment Market Value as a % of State General Fund	30%	29%		

Net Return on State General Fund Fundraising Investment	625%	678%		
State General Fund Fundraising Investment as a % of State General Fund	0.54%	1.10%		
State General Fund Advancement Investment as a % of State General Fund	1.86%	2.46%		

Total Fundraising Investment as a % of State General Fund	1.01%	1.22%		
Total Advancement Investment as a % of State General Fund	2.81%	2.89%		

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

GOAL MATRIX

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

Actual	Actual	Goal	Goal
04/05	05/06	06/07	07/08

PERFORMANCE INDICATORS

New Gifts	\$ 1,397,683	\$ 1,236,028		
New Pledges	\$ 1,113,965	\$ 11,065		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ -	\$ -		
Total Gift Commitments	\$ 2,511,648	\$ 1,247,093	\$ 2,769,092	\$ 1,250,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 2,447,721	\$ 2,317,276		
Percent of Total for Current Operations	45%	53%		
Percent of Total for Endowment	1%	0%		
Percent of Total for Campus Improvements	43%	44%		
Percent of Total as Planned/Deferred	0%	0%		
Percent of Total as Unrestricted	11%	0%		
Endowment Market Value	\$ 5,060,371	\$ 5,959,629		
Endowment Distribution	\$ 291,815	\$ 266,830		
Number of Individual Donors	385	704	841	1,000
Number of Alumni Donors	189	329	208	300
Number of Addressable Alumni	61,466	57,586	67,766	68,000
Number of Annual and Life Alumni Paid Memberships	703	1,131	775	1,000

INVESTMENT INDICATORS

State General Fund **\$ 62,098,700** **\$ 66,973,470** **\$ 67,925,336** **\$ 67,925,336**

Advancement Investment - Sources of Funds

State General Fund	\$2,028,306	\$1,904,124	\$1,142,884	
Other Sources	\$45,000		\$80,000	
Total	\$2,073,306	\$1,904,124	\$1,222,884	\$1,252,884

Advancement Investment - Uses of Funds

Fundraising				
State General Fund	\$ 646,353	\$ 762,664		
Other Sources	\$ 45,000			
Fundraising Subtotal	\$ 691,353	\$ 762,664		
Alumni Relations				
State General Fund	\$ 165,547	\$ 158,228		
Other Sources				
Alumni Relations Subtotal	\$ 165,547	\$ 158,228		
Public/Community Relations				
State General Fund	\$ 137,328	\$ 535,364		
Other Sources				
Public/Community Relations Subtotal	\$ 137,328	\$ 535,364		
Administration				
State General Fund	\$ 1,079,078	\$ 447,868		
Other Sources				
Administration Subtotal	\$ 1,079,078	\$ 447,868		

Fundraising Staff FTE (Professional) 4.8 5.3 1.9 3.0

COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	4%	2%	4%	2%
Endowment Market Value as a % of State General Fund	8%	9%		
Net Return on State General Fund Fundraising Investment	289%	64%		
State General Fund Fundraising Investment as a % of State General Fund	1.04%	1.14%		
State General Fund Advancement Investment as a % of State General Fund	3.27%	2.84%		
Total Fundraising Investment as a % of State General Fund	1.11%	1.14%		
Total Advancement Investment as a % of State General Fund	3.34%	2.84%		

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

GOAL MATRIX

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

Actual Actual Goal
04/05 05/06 06/07

Goal
07/08

PERFORMANCE INDICATORS

New Gifts	\$ 2,966,470	\$ 1,913,428		
New Pledges	\$ 5,239,102	\$ 448,050		
Testamentary Commitments	\$ 2,550,000	\$ 869,000		
Native American and Local Government Contributions	\$ -	\$ -		
Total Gift Commitments	\$ 10,755,572	\$ 3,230,478	\$ 3,500,000	\$ 3,700,000

Charitable Gift Receipts (New Gifts and Pledge Payments)

	\$ 4,760,454	\$ 5,160,699		
Percent of Total for Current Operations	47%	32.06%		
Percent of Total for Endowment	1%	3.69%		
Percent of Total for Campus Improvements	50%	62.43%		
Percent of Total as Planned/Deferred	0%	0.00%		
Percent of Total as Unrestricted	2%	1.82%		

Endowment Market Value	\$ 5,658,617	\$ 6,132,606		
Endowment Distribution	\$ 243,613	\$ 195,438		

Number of Individual Donors	1,830	1,865	2,200	2,650
Number of Alumni Donors	1,322	1,261	1,500	1,700
Number of Addressable Alumni	74,306	73,130	75,000	80,000
Number of Annual and Life Alumni Paid Memberships	2,716	2,604	2,700	2,800

INVESTMENT INDICATORS

State General Fund	\$ 75,988,500	\$ 81,269,700	\$ 83,707,791	\$ 87,056,103
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Advancement Investment - Sources of Funds

State General Fund	\$ 1,260,470	\$1,625,111	\$ 1,705,000	\$ 1,810,000
Other Sources	\$ 143,155	\$127,997	\$ 195,000	\$ 200,000
Total	\$ 1,403,625	\$ 1,753,108	\$ 1,900,000	\$ 2,010,000

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 661,375	\$ 870,359		
Other Sources	\$ 54,674	\$ 33,521		
Fundraising Subtotal	\$ 716,049	\$ 903,880		

Alumni Relations

State General Fund	\$ 271,443	\$ 401,731		
Other Sources	\$ 63,490	\$ 71,783		
Alumni Relations Subtotal	\$ 334,933	\$ 473,514		

Public/Community Relations

State General Fund	\$ 200,361	\$ 204,637		
Other Sources	\$ -	\$ -		
Public/Community Relations Subtotal	\$ 200,361	\$ 204,637		

Administration

State General Fund	\$ 127,292	\$ 148,384		
Other Sources	\$ 24,990	\$ 22,693		
Administration Subtotal	\$ 152,282	\$ 171,077		

Fundraising Staff FTE (Professional)	5.02	6.61	8.61	9.61
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	14%	4%	4%	4%
Endowment Market Value as a % of State General Fund	7%	8%		

Net Return on State General Fund Fundraising Investment	1526%	271%		
State General Fund Fundraising Investment as a % of State General Fund	0.87%	1.07%		
State General Fund Advancement Investment as a % of State General Fund	1.66%	2.00%	2.04%	2.08%

Total Fundraising Investment as a % of State General Fund	0.94%	1.11%		
Total Advancement Investment as a % of State General Fund	1.85%	2.16%	2.27%	2.31%

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

GOAL MATRIX

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

Actual	Actual	Goal	Goal
04/05	05/06	06/07	07/08

PERFORMANCE INDICATORS

New Gifts	\$ 13,151,900	\$ 13,427,200		
New Pledges		\$ 6,635,729		
Native American and Local Government Contributions	\$ 300	\$ -		
Testamentary Commitments	-	\$ 1,960,000		
Total Gift Commitments	\$ 13,152,200	\$ 22,022,929	\$ 23,000,000	\$ 27,600,000

Charitable Gift Receipts (New Gifts and Pledge Payments)

	\$ 15,621,000	\$ 14,699,500
Percent of Total for Current Operations	59%	72%
Percent of Total for Endowment	24%	19%
Percent of Total for Campus Improvements	9%	8%
Percent of Total as Planned/Deferred	7%	0%
Percent of Total as Unrestricted	1%	1%

Endowment Market Value	\$ 94,485,000	\$ 100,344,726
Endowment Distribution	\$ 4,851,657	\$ 5,194,775

Number of Individual Donors	7,703	7,097	7,452	7,824
Number of Alumni Donors	3,665	2,853	2,996	3,145
Number of Addressable Alumni	141,647	160,059	168,062	176,465
Number of Annual and Life Alumni Paid Memberships	6,263	6,822	7,163	7,521

INVESTMENT INDICATORS

State General Fund **\$ 125,375,100** **\$ 133,028,700** **\$ 127,574,111** **\$ 132,677,075**

Advancement Investment - Sources of Funds

State General Fund	\$ 2,990,523	\$ 3,382,792	\$ 3,575,682	\$ 3,708,709
Other Sources	\$ 2,476,757	\$ 2,488,488	\$ 3,630,566	\$ 3,841,310
Total	\$ 5,467,280	\$ 5,871,280	\$ 7,206,248	\$ 7,550,019

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 1,257,036	\$ 1,581,623
Other Sources	\$ 1,656,411	\$ 1,565,504
Fundraising Subtotal	\$ 2,913,447	\$ 3,147,127

Alumni Relations

State General Fund	\$ 479,399	\$ 510,992
Other Sources	\$ 227,388	\$ 247,247
Alumni Relations Subtotal	\$ 706,787	\$ 758,239

Public/Community Relations

State General Fund	\$ 724,910	\$ 793,796
Other Sources	\$ 155,005	\$ 168,847
Public/Community Relations Subtotal	\$ 879,915	\$ 962,643

Administration

State General Fund	\$ 413,093	\$ 496,381
Other Sources	\$ 465,358	\$ 506,890
Administration Subtotal	\$ 878,451	\$ 1,003,271

Fundraising Staff FTE (Professional)	16.2	20.3	22.3	22.3
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	10%	17%	18%	21%
Endowment Market Value as a % of State General Fund	75%	75%		
Net Return on State General Fund Fundraising Investment	946%	1292%		
State General Fund Fundraising Investment as a % of State General Fund	1.00%	1.19%		
State General Fund Advancement Investment as a % of State General Fund	2.39%	2.54%		
Total Fundraising Investment as a % of State General Fund	2.32%	2.37%		
Total Advancement Investment as a % of State General Fund	4.36%	4.41%		

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

GOAL MATRIX

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

Actual	Actual	Goal	Goal
04/05	05/06	06/07	07/08

PERFORMANCE INDICATORS

New Gifts	\$ 6,421,409	\$ 8,190,991		
New Pledges	\$ 2,796,786	\$ 3,025,802		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ -	\$ 3,500,000		
Total Gift Commitments	\$ 9,218,195	\$ 14,716,793	\$12,000,000	\$14,000,000

Charitable Gift Receipts (New Gifts and Pledge Payments)

	\$ 7,514,544	\$ 9,011,721
Percent of Total for Current Operations	57%	55%
Percent of Total for Endowment	13%	31%
Percent of Total for Campus Improvements	25%	10%
Percent of Total as Planned/Deferred	2%	2%
Percent of Total as Unrestricted	3%	2%

Endowment Market Value	\$ 9,828,444	\$ 13,377,000
Endowment Distribution	\$ 200,752	\$ 235,920

Number of Individual Donors	7,360	7,008	8,500	8,500
Number of Alumni Donors	4,925	4,681	5,600	5,600
Number of Addressable Alumni	127,163	149,467	135,000	157,238
Number of Annual and Life Alumni Paid Memberships	5,828	4,775	7,100	6,100

INVESTMENT INDICATORS

State General Fund	\$ 140,743,400	\$ 149,312,220	\$ 153,791,587	\$ 158,405,334
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Advancement Investment - Sources of Funds

State General Fund	\$ 6,002,013	\$ 6,399,457	\$6,387,755	\$7,044,190
Other Sources	\$ 112,024	\$ 50,700	\$106,274	\$0
Total	\$ 6,114,037	\$ 6,450,157	\$ 6,494,029	\$ 7,044,190

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 2,041,804	\$ 2,230,999
Other Sources	\$ 38,512	
Fundraising Subtotal	\$ 2,080,316	\$ 2,230,999

Alumni Relations

State General Fund	\$ 743,595	\$ 717,232
Other Sources	\$ -	
Alumni Relations Subtotal	\$ 743,595	\$ 717,232

Public/Community Relations

State General Fund	\$ 2,010,906	\$ 2,299,724
Other Sources		
Public/Community Relations Subtotal	\$ 2,010,906	\$ 2,299,724

Administration

State General Fund	\$ 1,133,931	\$ 1,151,502
Other Sources	\$ 73,512	\$ 50,700
Administration Subtotal	\$ 1,207,443	\$ 1,202,202

Fundraising Staff FTE (Professional)	15.43	17.08	18	19
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	6.55%	9.86%	7.80%	8.84%
Endowment Market Value as a % of State General Fund	6.98%	8.96%		
Net Return on State General Fund Fundraising Investment	120%	195%		
State General Fund Fundraising Investment as a % of State General Fund	1.45%	1.49%		
State General Fund Advancement Investment as a % of State General Fund	4.26%	4.29%		
Total Fundraising Investment as a % of State General Fund	1.48%	1.49%		
Total Advancement Investment as a % of State General Fund	4.34%	4.32%		

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

GOAL MATRIX

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

	Actual 04/05	Actual 05/06	Goal 06/07	Goal 07/08
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PERFORMANCE INDICATORS

New Gifts	\$ 3,916,898	\$ 4,614,521		
New Pledges	\$ 623,351	\$ 207,604		
Native American and Local Government Contributions	\$ 4,690	\$ 81,498		
Testamentary Commitments (Revocable Bequests)	0	0		
Total Gift Commitments	\$ 4,544,939	\$ 4,903,623	\$4,200,000	\$4,500,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 4,343,720	\$ 4,614,521		
Percent of Total for Current Operations	69%	76.85%		
Percent of Total for Endowment	28%	21.77%		
Percent of Total for Campus Improvements	0%	0.01%		
Percent of Total as Planned/Deferred	0%	0.00%		
Percent of Total as Unrestricted	3%	1.37%		

Endowment Market Value	\$ 12,663,531	\$ 16,083,418		
Endowment Distribution	\$ 270,261	\$ 270,859		

Number of Individual Donors	4,353	4,024	3,675	3,859
Number of Alumni Donors	1,982	1,976	2,205	2,315
Number of Addressable Alumni	43,592	44,568	48,060	50,463
Number of Annual and Life Alumni Paid Memberships	3,520	3,511	4,106	4,311

INVESTMENT INDICATORS

State General Fund

	\$ 63,111,006	\$ 68,755,676	\$ 70,818,346	\$ 72,942,897
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Advancement Investment - Sources of Funds

State General Fund	\$ 553,446	\$ 646,669	\$633,845	\$665,537
Other Sources	\$ 112,988	\$ 123,723	\$115,360	\$121,128
Total	\$ 666,434	\$ 770,392	\$749,205	\$786,665

Advancement Investment - Uses of Funds

Fundraising				
State General Fund	\$ 238,765	\$ 322,815		
Other Sources	\$ 25,938	\$ 48,062		
Fundraising Subtotal	\$ 264,703	\$ 370,877		
Alumni Relations				
State General Fund	\$ 87,250	\$ 174,359		
Other Sources	\$ 87,050	\$ 75,661		
Alumni Relations Subtotal	\$ 174,300	\$ 250,020		
Public/Community Relations				
State General Fund	\$ 108,972	\$ 132,179		
Other Sources	\$ -	\$ -		
Public/Community Relations Subtotal	\$ 108,972	\$ 132,179		
Administration				
State General Fund	\$ 118,459	\$ 17,316		
Other Sources	\$ -	\$ -		
Administration Subtotal	\$ 118,459	\$ 17,316		

Fundraising Staff FTE (Professional)	2.13	1.85	3	4
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	7%	7%	6%	6%
Endowment Market Value as a % of State General Fund	20%	23%		
Net Return on State General Fund Fundraising Investment	1804%	1419%		
State General Fund Fundraising Investment as a % of State General Fund	0.38%	0.47%		
State General Fund Advancement Investment as a % of State General Fund	0.88%	0.94%		
Total Fundraising Investment as a % of State General Fund	0.42%	0.54%		
Total Advancement Investment as a % of State General Fund	1.06%	1.12%		

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

GOAL MATRIX

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

	Actual 04/05	Actual 05/06	Goal 06/07	Goal 07/08
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PERFORMANCE INDICATORS

New Gifts	\$ 17,503,472	\$ 12,251,913		
New Pledges	\$ 2,445,000	\$ 1,249,812		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ 5,079,763	\$ 6,695,492		
Total Gift Commitments	\$ 25,028,235	\$ 20,197,217	\$27,000,000	\$28,900,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 18,169,097	\$ 12,677,413		
Percent of Total for Current Operations	60%	69%		
Percent of Total for Endowment	6%	13%		
Percent of Total for Campus Improvements	10%	7%		
Percent of Total as Planned/Deferred	18%	2%		
Percent of Total as Unrestricted	6%	8%		

Endowment Market Value	\$ 27,880,580	\$ 31,512,977		
Endowment Distribution	\$ 622,323	\$ 1,338,771		

Number of Individual Donors	17,988	31,857	19,500	32,000
Number of Alumni Donors	12,393	11,059	13,500	12,200
Number of Addressable Alumni	195,392	199,858	205,000	210,000
Number of Annual and Life Alumni Paid Memberships	29,270	30,528	32,000	33,400

INVESTMENT INDICATORS

State General Fund **\$ 165,823,900** **\$ 177,735,040** **\$ 190,215,840** **\$ 197,824,473**

Advancement Investment - Sources of Funds

State General Fund	4,661,418	4,799,329	5,790,184	7,040,111
Other Sources	1,961,560	1,985,679	1,985,679	1,985,679
Total	6,622,978	6,785,008	7,775,863	9,025,790

Advancement Investment - Uses of Funds

Fundraising				
State General Fund	2,431,372	2,526,872		
Other Sources	1,274,834	1,344,349		
Fundraising Subtotal	\$ 3,706,206	\$ 3,871,221		

Alumni Relations

State General Fund	428,499	460,035		
Other Sources	518,447	494,424		
Alumni Relations Subtotal	\$ 946,946	\$ 954,459		

Public/Community Relations

State General Fund	1,671,194	1,657,911		
Other Sources	168,278	135,726		
Public/Community Relations Subtotal	\$ 1,839,472	\$ 1,793,637		

Administration

State General Fund	130,354	154,511		
Other Sources		11,180		
Administration Subtotal	\$ 130,354	\$ 165,691		

Fundraising Staff FTE (Professional)	23.43	24.64	36.14	44.64
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	15.09%	11.36%	14.19%	14.61%
Endowment Market Value as a % of State General Fund	16.81%	17.73%		

Net Return on State General Fund Fundraising Investment	929%	699%		
State General Fund Fundraising Investment as a % of State General Fund	1.47%	1.42%		
State General Fund Advancement Investment as a % of State General Fund	2.81%	2.70%		

Total Fundraising Investment as a % of State General Fund	2.24%	2.18%		
Total Advancement Investment as a % of State General Fund	3.99%	3.82%		

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

GOAL MATRIX

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

Actual	Actual	Goal	Goal
04/05	05/06	06/07	07/08

PERFORMANCE INDICATORS

New Gifts	\$ 3,098,043	\$ 3,412,180		
New Pledges	\$ 733,179	\$ 718,036		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ 100,000	\$ -		
Total Gift Commitments	\$ 3,931,222	\$ 4,130,216	8,000,000	8,000,000

Charitable Gift Receipts (New Gifts and Pledge Payments)

	\$ 4,469,548	\$ 4,287,235
Percent of Total for Current Operations	80%	49%
Percent of Total for Endowment	8%	18%
Percent of Total for Campus Improvements	5%	26%
Percent of Total as Planned/Deferred	0%	0%
Percent of Total as Unrestricted	7%	7%

Endowment Market Value	\$ 10,836,406	\$ 15,613,315
Endowment Distribution	\$ 424,093	\$ 623,795

Number of Individual Donors	4,856	4,804	5,400	5,400
Number of Alumni Donors	3,879	3,754	4,200	4,200
Number of Addressable Alumni	107,426	105,206	117,000	120,000
Number of Annual and Life Alumni Paid Memberships	7,022	7,762	8,500	10,000

INVESTMENT INDICATORS

State General Fund	\$ 109,090,700	\$ 116,825,340	\$ 115,734,323	\$ 120,363,695
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Advancement Investment - Sources of Funds

State General Fund	\$ 2,216,746	\$ 2,524,510	\$2,381,800	\$2,414,113
Other Sources	\$ 643,540	\$ 537,782	\$333,118	\$656,199
Total	\$ 2,860,286	\$ 3,062,292	\$2,714,918	\$3,070,312

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 1,134,783	\$ 1,320,001
Other Sources	\$ 89,291	\$ 135,392
Fundraising Subtotal	\$ 1,224,074	\$ 1,455,393

Alumni Relations

State General Fund	\$ 227,517	\$ 324,386
Other Sources	\$ 425,958	\$ 351,861
Alumni Relations Subtotal	\$ 653,475	\$ 676,247

Public/Community Relations

State General Fund	\$ 441,318	\$ 472,353
Other Sources	\$ -	\$ 1,115
Public/Community Relations Subtotal	\$ 441,318	\$ 473,468

Administration

State General Fund	\$ 413,128	\$ 407,770
Other Sources	\$ 128,291	\$ 49,414
Administration Subtotal	\$ 541,419	\$ 457,184

Fundraising Staff FTE (Professional)	13.91	9.39	9.14	10
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	4%	4%	7%	7%
Endowment Market Value as a % of State General Fund	10%	13%		
Net Return on State General Fund Fundraising Investment	246%	213%		
State General Fund Fundraising Investment as a % of State General Fund	1.04%	1.13%		
State General Fund Advancement Investment as a % of State General Fund	2.03%	2.16%		
Total Fundraising Investment as a % of State General Fund	1.12%	1.25%		
Total Advancement Investment as a % of State General Fund	2.62%	2.62%		

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

GOAL MATRIX

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

Actual	Actual	Goal	Goal
04/05	05/06	06/07	07/08

PERFORMANCE INDICATORS

New Gifts	\$ 472,878	\$ 710,757		
New Pledges	\$ 12,500	\$ 23,000		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments (Revocable Bequests)	\$ -	\$ 325,000		
Total Gift Commitments	\$ 485,378	\$ 1,058,757	\$ 613,200	\$ 650,000

Charitable Gift Receipts (New Gifts and Pledge Payments)

	\$ 495,478	\$ 723,257		
Percent of Total for Current Operations	55%	34.39%		
Percent of Total for Endowment	5%	44.79%		
Percent of Total for Campus Improvements	4%	0.14%		
Percent of Total as Planned/Deferred	0%	5.54%		
Percent of Total as Unrestricted	36%	15.14%		

Endowment Market Value	\$ 1,594,189	\$ 1,730,404		
Endowment Distribution	\$ 29,590	\$ 51,000		

Number of Individual Donors	669	512	550	700
Number of Alumni Donors	358	276	290	480
Number of Addressable Alumni	3,543	3,501	3,325	3,450
Number of Annual and Life Alumni Paid Memberships	625	512	600	0

INVESTMENT INDICATORS

State General Fund	\$ 13,513,900	\$ 14,351,400	\$ 14,576,600	\$ 15,013,898
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Advancement Investment - Sources of Funds

State General Fund	\$ 438,143	\$ 441,591	\$ 400,000	\$ 400,000
Other Sources	\$ 640,371	\$ 85,023	\$ 600,000	\$ 650,000
Total	\$ 1,078,514	\$ 526,614	\$ 1,000,000	\$ 1,050,000

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 204,469	\$ 32,334		
Other Sources	\$ 305,360	\$ 68,468		
Fundraising Subtotal	\$ 509,829	\$ 100,802		

Alumni Relations

State General Fund	\$ 58,989	\$ 47,484		
Other Sources	\$ -	\$ -		
Alumni Relations Subtotal	\$ 58,989	\$ 47,484		

Public/Community Relations (excluding Governmental Relations)

State General Fund	\$ 234,934	\$ 172,066		
Other Sources	\$ -	\$ -		
Public/Community Relations Subtotal	\$ 234,934	\$ 172,066		

Administration

State General Fund	\$ 159,440	\$ 189,707		
Other Sources	\$ 446,870	\$ 16,555		
Administration Subtotal	\$ 606,310	\$ 206,262		

Fundraising Staff FTE (Professional)	2.00	1.00	1.00	1.5
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	4%	7%	4%	4%
Endowment Market Value as a % of State General Fund	12%	12%		
Net Return on State General Fund Fundraising Investment	137%	3174%		
State General Fund Fundraising Investment as a % of State General Fund	1.51%	0.23%		
State General Fund Advancement Investment as a % of State General Fund	3.24%	3.08%		
Total Fundraising Investment as a % of State General Fund	3.77%	0.70%		
Total Advancement Investment as a % of State General Fund	7.98%	3.67%		

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

GOAL MATRIX

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

Actual	Actual	Goal	Goal
04/05	05/06	06/07	07/08

PERFORMANCE INDICATORS

New Gifts	\$ 2,769,233	\$ 2,364,059		
New Pledges	\$ 220,197	\$ 88,142		
Native American and Local Government Contributions		\$ -		
Testamentary Commitments	\$ -	\$ -		
Total Gift Commitments	\$ 2,989,430	\$ 2,452,201	\$ 5,650,000	\$ 6,215,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 6,312,822	\$ 3,242,857		
Percent of Total for Current Operations	21%	57%		
Percent of Total for Endowment	11%	14%		
Percent of Total for Campus Improvements	67%	28%		
Percent of Total as Planned/Deferred	0%	0%		
Percent of Total as Unrestricted	1%	1%		

Endowment Market Value	\$ 3,240,222	\$ 3,832,510		
Endowment Distribution	\$ 38,860	\$ 29,302		

Number of Individual Donors	3,818	3,928	4,140	4,554
Number of Alumni Donors	53	67	100	110
Number of Addressable Alumni	2,618	3,445	3,698	3,938
Number of Annual and Life Alumni Paid Memberships	751	899	1,000	1,075

INVESTMENT INDICATORS

State General Fund **\$ 43,933,700** **\$ 46,617,600** **\$ 48,016,128** **\$ 49,456,612**

Advancement Investment - Sources of Funds

State General Fund	\$ 1,631,867	\$ 1,976,044	\$ 1,715,000	\$ 2,000,000
Other Sources	\$ 288,089	\$ 338,457	\$ 330,000	\$ 350,000
Total	\$ 1,919,956	\$ 2,314,501	\$ 2,045,000	\$ 2,350,000

Advancement Investment - Uses of Funds

Fundraising				
State General Fund	\$ 632,365	\$ 757,534		
Other Sources	\$ 194,210	\$ 266,749		
Fundraising Subtotal	\$ 826,575	\$ 1,024,283		
Alumni Relations				
State General Fund	\$ 124,958	\$ 181,704		
Other Sources	\$ 15,793	\$ 15,050		
Alumni Relations Subtotal	\$ 140,751	\$ 196,754		
Public/Community Relations				
State General Fund	\$ 452,608	\$ 545,883		
Other Sources	\$ 49,055	\$ 45,565		
Public/Community Relations Subtotal	\$ 501,663	\$ 591,448		
Administration				
State General Fund	\$ 421,936	\$ 490,923		
Other Sources	\$ 29,031	\$ 11,093		
Administration Subtotal	\$ 450,967	\$ 502,016		

Fundraising Staff FTE (Professional)	5.07	6.32	6.5	7.5
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	7%	5%	12%	13%
Endowment Market Value as a % of State General Fund	7%	8%		
Net Return on State General Fund Fundraising Investment	373%	224%		
State General Fund Fundraising Investment as a % of State General Fund	1.44%	1.62%		
State General Fund Advancement Investment as a % of State General Fund	3.71%	4.24%		
Total Fundraising Investment as a % of State General Fund	1.88%	2.20%		
Total Advancement Investment as a % of State General Fund	4.37%	4.96%		

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

GOAL MATRIX

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

	Actual 04/05	Actual 05/06	Goal 06/07	Goal 07/08
PERFORMANCE INDICATORS				
New Gifts	\$ 12,609,382	\$ 10,133,643		
New Pledges	\$ 3,450,274	\$ 1,985,335		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ 50,000	\$ 7,802,500		
Total Gift Commitments	\$ 16,109,656	\$ 19,921,478	\$ 19,500,000	\$ 21,000,000
Charitable Gift Receipts (Gifts and Pledge Payments)	\$ 15,338,959	\$ 20,611,819		
Percent of Total for Current Operations	35%	56%		
Percent of Total for Endowment	60%	18%		
Percent of Total for Campus Improvements	4%	9%		
Percent of Total as Planned/Deferred	0%	16%		
Percent of Total as Unrestricted	1%	1%		
Endowment Market Value	\$ 47,364,888	\$ 52,663,000		
Endowment Distribution	\$ 874,437	\$ 1,520,000		
Number of Individual Donors	8,697	7,900	9,000	9,000
Number of Alumni Donors	3,010	2,956	4,000	4,000
Number of Addressable Alumni	169,807	184,626	185,000	189,000
Number of Annual and Life Alumni Paid Memberships	5,467	3,909	4,700	5,100
INVESTMENT INDICATORS				
State General Fund	\$ 155,968,500	\$ 165,297,980	\$ 170,256,919	\$ 175,364,627
Advancement Investment - Sources of Funds				
State General Fund	\$ 3,707,600	\$ 4,368,887	\$ 4,000,000	\$ 4,200,000
Other Sources	\$ 613,862	\$ 588,022	\$ 700,000	\$ 800,000
Total	\$ 4,321,462	\$ 4,956,909	\$ 4,700,000	\$ 5,000,000
Advancement Investment - Uses of Funds				
Fundraising				
State General Fund	\$ 1,612,665	\$ 1,871,090		
Other Sources	\$ 125,915	\$ 50,730		
Fundraising Subtotal	\$ 1,738,580	\$ 1,921,820		
Alumni Relations				
State General Fund	\$ 454,465	\$ 454,962		
Other Sources	\$ 423,753	\$ 411,521		
Alumni Relations Subtotal	\$ 878,218	\$ 866,483		
Public/Community Relations				
State General Fund	\$ 1,189,934	\$ 1,577,506		
Other Sources	\$ 36,473	\$ 11,812		
Public/Community Relations Subtotal	\$ 1,226,407	\$ 1,589,318		
Administration				
State General Fund	\$ 450,535	\$ 465,329		
Other Sources	\$ 27,722	\$ 113,959		
Administration Subtotal	\$ 478,257	\$ 579,288		
Fundraising Staff FTE (Professional)	13.4	15	17	18
COMPARISONS				
Total Philanthropic Productivity as a % of State General Fund	10.33%	12.05%	11.45%	11.98%
Endowment Market Value as a % of State General Fund				
Net Return on State General Fund Fundraising Investment	899%	965%		
State General Fund Fundraising Investment as a % of State General Fund	1.03%	1.13%		
State General Fund Advancement Investment as a % of State General Fund	2.38%	2.64%		
Total Fundraising Investment as a % of State General Fund	1.11%	1.16%		
Total Advancement Investment as a % of State General Fund	2.77%	3.00%		

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

GOAL MATRIX

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

Actual	Actual	Goal	Goal
04/05	05/06	06/07	07/08

PERFORMANCE INDICATORS

New Gifts	\$ 7,917,392	\$ 5,914,296		
New Pledges	\$ 2,254,826	\$ 525,000		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ 1,411,000	\$ -		
Total Gift Commitments	\$ 11,583,218	\$ 6,439,296	24,862,279	25,000,000

Charitable Gift Receipts (New Gifts and Pledge Payments)

	\$ 9,810,855	\$ 6,359,796		
Percent of Total for Current Operations	50%	59.36%		
Percent of Total for Endowment	50%	34.31%		
Percent of Total for Campus Improvements	2%	1.68%		
Percent of Total as Planned/Deferred		0.00%		
Percent of Total as Unrestricted	5%	4.65%		
Endowment Market Value	\$ 23,606,561	\$ 27,403,799		
Endowment Distribution	\$ 968,948	\$ 290,967		
Number of Individual Donors	2,038	1,789	1,967	2,065
Number of Alumni Donors	5,634	4,534	4,987	5,236
Number of Addressable Alumni	95,494	100,706	103,109	106,309
Number of Annual and Life Alumni Paid Memberships	3,354	3,188	3,220	3,352

INVESTMENT INDICATORS

State General Fund **\$ 120,544,300** **\$ 129,173,000** **\$ 133,048,190** **\$ 137,039,636**

Advancement Investment - Sources of Funds

State General Fund	\$ 2,887,183	\$ 3,170,885	4,143,703	4,558,073
Other Sources	\$ 434,291	\$ 523,803	465,000	511,500
Total	\$ 3,321,474	\$ 3,694,688	\$ 4,608,703	\$ 5,069,573

Advancement Investment - Uses of Fund

Fundraising

State General Fund	\$ 1,391,112	\$ 1,718,145		
Other Sources	\$ 222,344	\$ 288,909		
Fundraising Subtotal	\$ 1,613,456	\$ 2,007,054		

Alumni Relations

State General Fund	\$ 312,657	\$ 312,748		
Other Sources	\$ 31,900	\$ 16,164		
Alumni Relations Subtotal	\$ 344,557	\$ 328,912		

Public/Community Relations

State General Fund	\$ 590,864	\$ 615,658		
Other Sources	\$ 154,255	\$ 147,355		
Public/Community Relations Subtotal	\$ 745,119	\$ 763,013		

Administration

State General Fund	\$ 592,550	\$ 524,334		
Other Sources	\$ 25,792	\$ 71,375		
Administration Subtotal	\$ 618,342	\$ 595,709		

Fundraising Staff FTE (Professional)	15.70	18.70	20.7	24.7
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	10%	5%	19%	18%
Endowment Market Value as a % of State General Fund	20%	21%		
Net Return on SGF Fundraising Investment	733%	275%		
State General Fund Fundraising Investment as a % of State General Fund	1.15%	1.33%		
State General Fund Advancement Investment as a % of State General Fund	2.40%	2.45%		
Total Fundraising Investment as a % of State General Fund	1.34%	1.55%		
Total Advancement Investment as a % of State General Fund	2.76%	2.86%		

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

GOAL MATRIX

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

Actual	Actual	Goal	Goal
04/05	05/06	06/07	07/08

PERFORMANCE INDICATORS

New Gifts	\$ 6,455,763	\$ 9,435,733		
New Pledges	\$ 707,500	\$ 5,559,164		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments (Revocable Bequests)	\$ 100,000	\$ 1,245,000		
Total Gift Commitments	\$ 7,263,263	\$ 16,239,897	14,538,460	14,600,000

Charitable Gift Receipts (New Gifts and Pledge Payments)

	\$ 6,480,763	\$ 9,638,233		
Percent of Total for Current Operations	76%	55.86%		
Percent of Total for Endowment	17%	17.83%		
Percent of Total for Campus Improvements	4%	24.74%		
Percent of Total as Planned/Deferred	1%	0.00%		
Percent of Total as Unrestricted	2%	1.58%		

Endowment Market Value	\$ 15,415,623	\$ 16,353,318		
Endowment Distribution	\$ 680,861	\$ 522,074		

Number of Individual Donors	27,785	29,511	29,000	29,500
Number of Alumni Donors	2,116	2,801	2,200	2,900
Number of Addressable Alumni	153,594	157,259	161,500	165,000
Number of Annual and Life Alumni Paid Memberships	4,532	4,751	5,000	5,100

INVESTMENT INDICATORS

State General Fund	\$ 137,791,500	\$ 148,849,500	\$ 153,314,985	\$ 157,914,435
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Advancement Investment - Sources of Funds

State General Fund	\$ 3,379,265	\$ 3,497,341	\$3,854,174.86	\$3,854,174.86
Other Sources	\$ 985,130	\$ 1,266,427	\$381,000.00	\$1,271,500.00
Total	\$ 4,364,395	\$ 4,763,768	\$4,235,174.86	\$5,125,674.86

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 1,395,291	\$ 1,794,302		
Other Sources	\$ 673,638	\$ 1,029,842		
Fundraising Subtotal	\$ 2,068,928	\$ 2,824,144		

Alumni Relations

State General Fund	\$ 714,240	\$ 553,301		
Other Sources	\$ 311,493	\$ 236,585		
Alumni Relations Subtotal	\$ 1,025,733	\$ 789,886		

Public/Community Relations (excluding Governmental Relations)

State General Fund	\$ 976,399	\$ 825,679		
Other Sources	\$ -	\$ -		
Public/Community Relations Subtotal	\$ 976,399	\$ 825,679		

Administration

State General Fund	\$ 293,335	\$ 324,059		
Other Sources	\$ -	\$ -		
Administration Subtotal	\$ 293,335	\$ 324,059		

Fundraising Staff FTE (Professional)	20.15	24.55	24	24
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	5%	11%	9%	9%
Endowment Market Value as a % of State General Fund	11%	11%		
Net Return on State General Fund Fundraising Investment	421%	805%		
State General Fund Fundraising Investment as a % of State General Fund	1.01%	1.21%		
State General Fund Advancement Investment as a % of State General Fund	2.45%	2.35%		
Total Fundraising Investment as a % of State General Fund	1.50%	1.90%		
Total Advancement Investment as a % of State General Fund	3.17%	3.20%		

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

Goal Matrix

Campus Name: SAN BERNARDINO	Actual	Actual	Goal	Goal
Group Classification: 2	04/05	05/06	06/07	07/08
PERFORMANCE INDICATORS				
New Gifts	\$ 2,231,827	\$ 4,945,692		
New Pledges	\$ 1,273,896	\$ 9,717,240		
Native American and Local Government Contributions	\$ 1,303,247	\$ 1,457,143		
Testamentary Commitments (Revocable Bequests)	\$ -	\$ -		
Total Gifts Commitments	<u>\$ 4,808,970</u>	<u>\$ 16,120,075</u>	\$ 9,850,000	\$ 11,100,000
Charitable Gift Receipts (Gifts and Pledge Payments)	<u>\$ 2,669,884</u>	<u>\$ 5,728,536</u>	n/a	n/a
Percent of Total for Current Operations	63%	40%		
Percent of Total for Endowment	19%	10%		
Percent of Total for Campus Improvements	17%	12%		
Percent of Total as Planned/Deferred	0%	38%		
Percent of Total as Unrestricted	1%	0%		
Endowment Market Value	\$ 10,288,284	\$ 11,143,074		
Endowment Distribution	\$ 302,000	\$ 311,600		
Number of Individual Donors	2,469	2,429	2,550	2,700
Number of Alumni Donors	1,517	1,290	1,400	1,500
Number of Addressable Alumni	52,131	53,070	54,500	57,000
Number of Annual and Life Alumni Paid Memberships	3,116	3,087	3,150	3,250
INVESTMENT INDICATORS				
State General Fund	<u>\$ 84,281,900</u>	<u>\$ 91,942,110</u>	<u>\$ 98,104,320</u>	<u>\$ 101,047,450</u>
Advancement Investment - Sources of Funds				
State General Fund	\$ 2,495,910	3,164,765	3,449,594	3,553,082
Other Sources	\$ 682,387	390,943	426,128	438,912
Total	<u>\$ 3,178,297</u>	<u>\$ 3,555,709</u>	<u>3,875,723</u>	<u>3,991,994</u>
Advancement Investment - Uses of Funds				
Fundraising				
State General Fund	\$ 1,248,607	\$ 1,314,868		
Other Sources	\$ 579,954	\$ 292,101		
Total	<u>\$ 1,828,561</u>	<u>\$ 1,606,969</u>		
Alumni Relations				
State General Fund	\$ 253,593	\$ 329,716		
Other Sources	\$ 93,978	\$ 32,568		
Total	<u>\$ 347,571</u>	<u>\$ 362,284</u>		
Public/Community Relations				
State General Fund	\$ 578,755	\$ 689,034		
Other Sources	\$ -	\$ 26,848		
Total	<u>\$ 578,755</u>	<u>\$ 715,882</u>		
Administration				
State General Fund	\$ 414,955	\$ 831,147		
Other Sources	\$ 8,455	\$ 39,427		
Total	<u>\$ 423,410</u>	<u>\$ 870,574</u>		
Fundraising Staff FTE (Professional)	12.26	10.81	10	10
INVESTMENT ANALYSIS				
Gift Commitments as a % of State General Fund	5.71%	17.53%	10.04%	10.98%
Endowment Market Value as a % of State General Fund	12.21%	12.12%		
Net Return on State General Fund Fundraising Investment	300%	1126%		
State General Fund Fundraising Investment as a % of State General Fund	1.48%	1.43%		
State General Fund Advancement Investment as a % of State General Fund	2.96%	3.44%		
Total Fundraising Investment as a % of State General Fund	2.17%	1.75%		
Total Advancement Investment as a % of State General Fund	3.77%	3.87%		

Note: Detail breakdowns are only available for prior years. Goals are represented as totals.

GOAL MATRIX

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

Actual	Actual	Goal	Goal
04/05	05/06	06/07	07/08

PERFORMANCE INDICATORS

New Gifts	\$ 39,742,688	\$ 41,395,777		
New Pledges	\$ 12,748,167	\$ 3,353,512		
Native American and Local Government Contributions	\$ 121,850	\$ 2,437,250		
Testamentary Commitments	\$ 4,790,000	\$ 607,808		
Total Gift Commitments	\$ 57,402,705	\$ 47,794,347	\$ 57,500,000	\$ 60,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 49,156,832	\$ 48,940,809		
Percent of Total for Current Operations	87%	71.83%		
Percent of Total for Endowment	8%	15.00%		
Percent of Total for Campus Improvements	0%	0.25%		
Percent of Total as Planned/Deferred	5%	12.81%		
Percent of Total as Unrestricted	0%	0.11%		

Endowment Market Value	\$ 99,628,917	\$ 97,988,000		
Endowment Distribution	\$ 4,433,277	\$ 3,723,000		

Number of Individual Donors	64,824	65,010	70,000	75,000
Number of Alumni Donors	7,203	7,392	8,000	9,000
Number of Addressable Alumni	186,139	186,397	195,000	200,000
Number of Annual and Life Alumni Paid Memberships	10,268	8,935	11,500	10,000

INVESTMENT INDICATORS

State General Fund	\$ 178,713,300	\$ 192,540,150	\$ 198,316,355	\$ 204,265,845
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Advancement Investment - Sources of Funds

State General Fund	\$ 5,828,342	\$ 6,937,656	650000	7250000
Other Sources	\$ 5,799,245	\$ 6,509,016	625000	6750000
Total	\$ 11,627,587	\$ 13,446,672	\$ 12,750,000	\$ 14,000,000

Advancement Investment - Uses of Funds

Fundraising				
State General Fund	\$ 3,563,539	\$ 4,501,737		
Other Sources	\$ 5,021,719	\$ 5,616,367		
Fundraising Subtotal	\$ 8,585,258	\$ 10,118,104		

Alumni Relations

State General Fund	\$ 587,257	\$ 717,436		
Other Sources	\$ 700,364	\$ 635,070		
Alumni Relations Subtotal	\$ 1,287,621	\$ 1,352,506		

Public/Community Relations

State General Fund	\$ 1,008,805	\$ 1,028,000		
Other Sources	\$ 2,578	\$ 111,884		
Public/Community Relations Subtotal	\$ 1,011,383	\$ 1,139,884		

Administration

State General Fund	\$ 668,741	\$ 690,483		
Other Sources	\$ 74,584	\$ 145,695		
Administration Subtotal	\$ 743,325	\$ 836,178		

Fundraising Staff FTE (Professional)	32.45	38.15	32.45	45
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	32%	25%	29%	29%
Endowment Market Value as a % of State General Fund	56%	51%		
Net Return on State General Fund Fundraising Investment	1511%	962%		
State General Fund Fundraising Investment as a % of State General Fund	1.99%	2.34%		
State General Fund Advancement Investment as a % of State General Fund	6.51%	6.98%		
Total Fundraising Investment as a % of State General Fund	4.80%	5.26%		
Total Advancement Investment as a % of State General Fund	6.51%	6.98%		

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

GOAL MATRIX

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

	Actual 04/05	Actual 05/06	Goal 06/07	Goal 07/08
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PERFORMANCE INDICATORS

New Gifts	\$ 11,459,001	\$ 4,139,666		
New Pledges	\$ 8,763,124	\$ 1,450,469		
Native American and Local Government Contributions.	\$ -	\$ -		
Testamentary Commitments	\$ -	\$ 2,790,000		
Total Gift Commitments	\$ 20,222,125	\$ 8,380,135	\$ 14,300,000	\$ 16,000,000

Charitable Gift Receipts (New Gifts and Pledge Payments)

	\$ 13,974,880	\$ 5,848,087		
Percent of Total for Current Operations	45%	82%		
Percent of Total for Endowment	47%	12%		
Percent of Total for Campus Improvements	2%	4%		
Percent of Total as Planned/Deferred	5%	0%		
Percent of Total as Unrestricted	1%	2%		

Endowment Market Value	\$ 31,340,913	\$ 31,543,490		
Endowment Distribution	\$ 2,238,366	\$ 397,701		

Number of Individual Donors	2,148	2,594	4,800	5,000
Number of Alumni Donors	1,031	1,150	2,500	2,800
Number of Addressable Alumni*	220,290	219,543	122,257	128,770
Number of Annual and Life Alumni Paid Memberships	3,911	3,401	2,356	3,350

INVESTMENT INDICATORS

State General Fund	\$ 133,046,400	\$ 143,302,700	\$ 147,601,781	\$ 152,029,834
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Advancement Investment - Sources of Funds

State General Fund	\$ 2,850,074	\$ 3,407,697	\$ 3,750,000	\$ 4,000,000
Other Sources	\$ 231,739	\$ 42,114	\$ 100,000	\$ 200,000
Total	\$ 3,081,813	\$ 3,449,811	\$ 3,850,000	\$ 4,200,000

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 1,841,958	\$ 1,976,059		
Other Sources	\$ 14,725	\$ 6,390		
Fundraising Subtotal	\$ 1,856,683	\$ 1,982,449		

Alumni Relations

State General Fund	\$ 124,129	\$ 324,577		
Other Sources	\$ 138,604	\$ 4,482		
Alumni Relations Subtotal	\$ 262,733	\$ 329,059		

Public/Community Relations

State General Fund	\$ 717,864	\$ 976,110		
Other Sources	\$ 78,410	\$ 31,242		
Public/Community Relations Subtotal	\$ 796,274	\$ 1,007,352		

Administration

State General Fund	\$ 166,123	\$ 130,951		
Other Sources				
Administration Subtotal	\$ 166,123	\$ 130,951		

Fundraising Staff FTE (Professional)	8.00	9.00	20.00	22.00
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	15%	6%	10%	11%
Endowment Market Value as a % of State General Fund	24%	22%		
Net Return on SGF Fundraising Investment	998%	324%		
State General Fund Fundraising Investment as a % of State General Fund	1.38%	1.38%		
State General Fund Advancement Investment as a % of State General Fund	2.14%	2.38%		
Total Fundraising Investment as a % of State General Fund	1.40%	1.38%		
Total Advancement as a % of State General Fund	2.32%	2.41%		

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

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

GOAL MATRIX

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

	Actual 04/05	Actual 05/06	Goal 06/07	Goal 07/08
PERFORMANCE INDICATORS				
New Gifts	\$ 10,490,354	\$ 12,962,498		
New Pledges	\$ 5,612,500	\$ 400,346		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ 9,150,000	\$ 13,000,000		
Total Gift Commitments	\$ 25,252,854	\$ 26,362,844	\$30,000,000	\$33,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 10,438,099	\$ 14,010,465
Percent of Total for Current Operations	71%	72.53%
Percent of Total for Endowment	3%	6.04%
Percent of Total for Campus Improvements	21%	12.81%
Percent of Total as Planned/Deferred	1%	0.71%
Percent of Total as Unrestricted	4%	7.91%

Endowment Market Value	\$ 35,126,000	\$ 39,157,000
Endowment Distribution	\$ 1,165,524	\$ 1,674,000

Number of Individual Donors	6,706	6,448	7,500	7,800
Number of Alumni Donors	4,054	4,065	4,550	4,800
Number of Addressable Alumni	147,398	196,010	150,000	190,000
Number of Annual and Life Alumni Paid Memberships	9,409	11,215	12,760	15,000

INVESTMENT INDICATORS

State General Fund	\$ 141,297,000	\$ 150,558,500	\$ 155,075,255	\$ 159,727,513
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Advancement Investment - Sources of Funds

State General Fund	\$ 4,692,254	\$ 5,050,718	\$6,334,254	\$6,300,000
Other Sources	\$ 322,853	\$ 463,000	\$802,991	\$1,780,000
Total	\$ 5,015,107	\$ 5,513,718	\$ 7,137,245	\$ 8,080,000

Advancement Investment - Uses of Funds

Fundraising				
State General Fund	\$ 1,621,683	\$ 1,935,122		
Other Sources	\$ 322,853	\$ 101,400		
Fundraising Subtotal	\$ 1,944,536	\$ 2,036,522		

Alumni Relations

State General Fund	\$ 473,157	\$ 470,282		
Other Sources	\$ 322,753	\$ 66,300		
Alumni Relations Subtotal	\$ 795,910	\$ 536,582		

Public/Community Relations

State General Fund	\$ 945,871	\$ 938,254		
Other Sources	\$ 7,800	\$ 7,800		
Public/Community Relations Subtotal	\$ 953,671	\$ 946,054		

Administration

State General Fund	\$ 1,651,543	\$ 1,707,060		
Other Sources	\$ 126,197	\$ 287,500		
Administration Subtotal	\$ 1,777,740	\$ 1,994,560		

Fundraising Staff FTE (Professional)	14.3	14.6	18.95	24
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	18%	18%	19%	21%
Endowment Market Value as a % of State General Fund	25%	26%		
Net Return on State General Fund Fundraising Investment	1457%	1262%		
State General Fund Fundraising Investment as a % of State General Fund	1.15%	1.29%		
State General Fund Advancement Investment as a % of State General Fund	3.32%	3.35%		
Total Fundraising Investment as a % of State General Fund	1.38%	1.35%		
Total Advancement Investment as a % of State General Fund	3.55%	3.66%		

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

GOAL MATRIX

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

Actual 04/05	Actual 05/06	Goal 06/07	Goal 07/08
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PERFORMANCE INDICATORS

New Gifts	\$ 14,499,107	\$ 18,562,455		
New Pledges	\$ 11,404,954	\$ 8,244,925		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments (Revocable Bequests)	\$ 13,020,863	\$ 3,506,453		
Total Gift Commitments	\$ 38,924,924	\$ 30,313,833	30,500,000	33,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)	\$ 24,696,440	\$ 23,414,840		
Percent of Total for Current Operations	33%	36%		
Percent of Total for Endowment	19%	40%		
Percent of Total for Campus Improvements	44%	16%		
Percent of Total as Planned/Deferred	1%	5%		
Percent of Total as Unrestricted	3%	3%		

Endowment Market Value	\$ 148,861,122	\$ 164,822,000		
Endowment Distribution	\$ 4,792,046	\$ 5,479,800		

Number of Individual Donors	17,989	17,728	18,715	19,300
Number of Alumni Donors	10,136	9,062	10,545	9,800
Number of Addressable Alumni	123,926	127,399	128,932	129,500
Number of Annual and Life Alumni Paid Memberships	12,100	12,847	12,588	12,750

INVESTMENT INDICATORS

State General Fund	\$ 120,737,300	\$ 129,995,900	\$ 133,895,777	\$ 140,000,000
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Advancement Investment - Sources of Funds

State General Fund	\$ 4,179,216	\$ 4,398,605	\$ 4,880,000	\$ 4,950,000
Other Sources	\$ 2,160,312	\$ 2,218,206	\$ 2,185,000	\$ 2,190,000
Total	\$ 6,339,528	\$ 6,616,811	\$ 7,065,000	\$ 7,140,000

Advancement Investment - Uses of Funds

Fundraising				
State General Fund	\$ 2,083,625	\$ 2,235,131		
Other Sources	\$ 1,083,957	\$ 1,132,986		
Fundraising Subtotal	\$ 3,167,581	\$ 3,368,117		

Alumni Relations				
State General Fund	\$ 648,577	\$ 681,703		
Other Sources	\$ 542,612	\$ 627,634		
Alumni Relations Subtotal	\$ 1,191,188	\$ 1,309,337		

Public/Community Relations				
State General Fund	\$ 996,578	\$ 1,042,565		
Other Sources	\$ 436,835	\$ 407,777		
Public/Community Relations Subtotal	\$ 1,433,413	\$ 1,450,342		

Administration				
State General Fund	\$ 450,437	\$ 439,206		
Other Sources	\$ 96,908	\$ 49,809		
Administration Subtotal	\$ 547,345	\$ 489,015		

Fundraising Staff FTE (Professional)	17.18	16.81	17	17
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COMPARISONS

Total Philanthropic Productivity as a % of SGF	32%	23%	23%	24%
Endowment Market Value as a % of State General Fund	123%	127%		
Net Return on SGF Fundraising Investment	1768%	1256%		
State General Fund Fundraising Investment as a % of State General Fund	1.73%	1.72%		
State General Fund Advancement Investment as a % of State General Fund	3.46%	3.38%		
Total Fundraising Investment as a % of State General Fund	2.62%	2.59%		
Total Advancement as a % of State General Fund	5.25%	5.09%		

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

GOAL MATRIX

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

	Actual 04/05	Actual 05/06	Goal 06/07	Goal 07/08
PERFORMANCE INDICATORS				
New Gifts	\$ 1,098,678	\$ 4,974,778	2,000,000	
New Pledges	\$ 5,717,400	\$ 30,000	400,000	
Native American and Local Government Contributions	\$ -	\$ -	-	
Testamentary Commitments	\$ -	\$ -	0	
Total Gift Commitments	\$ 6,816,078	\$ 5,004,778	\$ 2,400,000	\$ 2,650,000
Charitable Gift Receipts (Gifts and Pledge Payments)	\$ 1,723,107	\$ 5,513,920		
Percent of Total for Current Operations	90%	28.07%		
Percent of Total for Endowment	3%	27.71%		
Percent of Total for Campus Improvements	0%	42.82%		
Percent of Total as Planned/Deferred	0%	0.00%		
Percent of Total as Unrestricted	7%	1.41%		
Endowment Market Value	\$ 8,195,000	\$ 11,727,000		
Endowment Distribution	\$ 340,260	\$ 352,645		
Number of Individual Donors	582	411	400	550
Number of Alumni Donors	270	65	75	100
Number of Addressable Alumni	14,195	14,402	16,400	17,900
Number of Annual and Life Alumni Paid Memberships	643	798	750	825
INVESTMENT INDICATORS				
State General Fund	\$ 50,618,800	\$ 54,364,480	\$ 55,995,414	\$ 58,235,231
Advancement Investment - Sources of Funds				
State General Fund	\$ 1,278,348	\$ 1,374,624	1356199	1356199
Other Sources	\$ 298,543	\$ 60,126	71000	71000
Total	\$ 1,576,891	\$ 1,434,750	\$ 1,427,199	\$ 1,427,199
Advancement Investment - Uses of Funds				
Fundraising				
State General Fund	\$ 581,709	\$ 471,456		
Other Sources	\$ 296,206	\$ 42,314		
Fundraising Subtotal	\$ 877,915	\$ 513,770		
Alumni Relations				
State General Fund	\$ 131,249	\$ 208,041		
Other Sources	\$ -	\$ -		
Alumni Relations Subtotal	\$ 131,249	\$ 208,041		
Public/Community Relations				
State General Fund	\$ 168,422	\$ 179,742		
Other Sources	\$ 2,337	\$ 2,959		
Public/Community Relations Subtotal	\$ 170,759	\$ 182,701		
Administration				
State General Fund	\$ 396,969	\$ 515,385		
Other Sources	\$ -	\$ 14,853		
Administration Subtotal	\$ 396,969	\$ 530,238		
Fundraising Staff FTE (Professional)	7.7	4.1	4	4
COMPARISONS				
Total Philanthropic Productivity as a % of State General Fund	13%	9%	4%	5%
Endowment Market Value as a % of State General Fund	16%	22%		
Net Return on State General Fund Fundraising Investment	1072%	962%		
State General Fund Fundraising Investment as a % of State General Fund	1.15%	0.87%		
State General Fund Advancement Investment as a % of State General Fund	2.53%	2.53%		
Total Fundraising Investment as a % of State General Fund	1.73%	0.95%		
Total Advancement as a % of State General Fund	3.12%	2.64%		

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

GOAL MATRIX

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

	Actual 04/05	Actual 05/06	Goal* 06/07	Goal 07/08
PERFORMANCE INDICATORS				
New Gifts	\$ 5,052,752	\$ 3,725,496		
New Pledges	\$ 1,285,068	\$ 5,506,928		
Native American and Local Government Contributions	\$ 1,025,000	\$ -		
Testamentary Commitments	\$ 3,229,895	\$ 200,000		
Total Gift Commitments	\$ 10,592,715	\$ 9,432,424	\$ 7,000,000	\$ 8,000,000

Charitable Gift Receipts (Gifts and Pledge Payments)

	\$ 16,085,357	\$ 6,095,751		
Percent of Total for Current Operations	32%	66%		
Percent of Total for Endowment	11%	8%		
Percent of Total for Campus Improvements	56%	14%		
Percent of Total as Planned/Deferred	0%	12%		
Percent of Total as Unrestricted	1%	0%		

Endowment Market Value	\$ 27,516,572	\$ 31,284,000		
Endowment Distribution	\$ 305,000	\$ 884,125		

Number of Individual Donors	2,746	2,693	3,200	3,500
Number of Alumni Donors	468	382	546	600
Number of Addressable Alumni	38,812	38,932	40,612	41,000
Number of Annual and Life Alumni Paid Memberships	1,732	1,558	2,020	2,200

INVESTMENT INDICATORS

State General Fund	\$ 50,478,074	\$ 54,301,344	\$ 55,930,384	\$ 57,608,296
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Advancement Investment - Sources of Funds

State General Fund	\$ 1,636,927	\$ 1,746,632		
Other Sources	\$ 9,599	\$ 53,973		
Total	\$ 1,646,526	\$ 1,800,605	\$ 1,850,000	\$ 1,870,000

Advancement Investment - Uses of Funds

Fundraising				
State General Fund	\$ 504,266	\$ 771,855		
Other Sources	\$ -	\$ -		
Fundraising Subtotal	\$ 504,266	\$ 771,855		

Alumni Relations				
State General Fund	\$ 236,408	\$ 155,671		
Other Sources	\$ 2,591	\$ 43,784		
Alumni Relations Subtotal	\$ 238,999	\$ 199,455		

Public/Community Relations (excluding Governmental Relations)				
State General Fund	\$ 475,876	\$ 372,942		
Other Sources	\$ -	\$ -		
Public/Community Relations Subtotal	\$ 475,876	\$ 372,942		

Administration				
State General Fund	\$ 420,379	\$ 446,164		
Other Sources	\$ 7,007	\$ 10,189		
Administration Subtotal	\$ 427,386	\$ 456,353		

Fundraising Staff FTE (Professional)	4.28	2.88	5.25	6.00
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	21%	17%	13%	14%
Endowment Market Value as a % of State General Fund	55%	58%		
Net Return on State General Fund Fundraising Investment	2001%	1122%		
State General Fund Fundraising Investment as a % of State General Fund	1.00%	1.42%		
State General Fund Advancement Investment as a % of State General Fund	3.24%	3.22%		
Total Fundraising Investment as a % of State General Fund	1.00%	1.42%		
Total Advancement Investment as a % of State General Fund	3.26%	3.32%		

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

* The Total Gift Commitments for 05/06 includes two large gifts - cash & pledge - that significantly increased our bottom line and will be difficult to repeat. We have, however, increased our 06/07 goal by \$1M.

GOAL MATRIX

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

	Actual 04/05	Actual 05/06	Goal 06/07	Goal 07/08
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PERFORMANCE INDICATORS

New Gifts	\$ 2,392,601	\$ 1,860,056		
New Pledges	\$ 80,258	\$ 51,269		
Native American and Local Government Contributions	\$ -	\$ -		
Testamentary Commitments	\$ -	\$ -		
Total Gift Commitments	\$ 2,472,859	\$ 1,911,325	\$ 3,075,000	\$ 3,580,000

Charitable Gift Receipts (New Gifts and Pledge Payments)

	\$ 2,392,601	\$ 1,978,930
Percent of Total for Current Operations	81%	84.09%
Percent of Total for Endowment	10%	8.91%
Percent of Total for Campus Improvements	5%	3.38%
Percent of Total as Planned/Deferred	0%	0.00%
Percent of Total as Unrestricted	4%	3.62%

Endowment Market Value	\$ 7,680,284	\$ 7,837,282
Endowment Distribution	\$ 208,566	\$ 206,127

Number of Individual Donors	2,033	1,746	2,250	2,500
Number of Alumni Donors	1,244	1,196	1,500	1,800
Number of Addressable Alumni	36,954	35,944	41,522	43,000
Number of Annual and Life Alumni Paid Memberships	740	1,371	810	N/A

INVESTMENT INDICATORS

State General Fund **\$ 50,341,300** **\$ 53,683,980** **\$ 57,936,130** **\$ 59,674,214**

Advancement Investment - Sources of Funds

State General Fund	\$ 1,544,057	\$ 1,520,998	\$ 1,440,170	\$ 1,440,000
Other Sources	\$ 125,655	\$ 110,867	\$ 100,000	\$ 100,000
Total	\$ 1,669,712	\$ 1,631,865	\$ 1,540,170	\$ 1,540,000

Advancement Investment - Uses of Funds

Fundraising

State General Fund	\$ 742,825	\$ 590,943
Other Sources	\$ 66,683	\$ 63,821
Fundraising Subtotal	\$ 809,508	\$ 654,764

Alumni Relations

State General Fund	\$ 127,495	\$ 94,766
Other Sources	\$ -	\$ -
Alumni Relations Subtotal	\$ 127,495	\$ 94,766

Public/Community Relations (excluding Governmental Relations)

State General Fund	\$ 400,229	\$ 411,813
Other Sources	\$ 6,414	\$ 4,983
Public/Community Relations Subtotal	\$ 406,642	\$ 416,796

Administration

State General Fund	\$ 299,510	\$ 385,940
Other Sources	\$ 43,495	\$ 42,064
Administration Subtotal	\$ 343,005	\$ 428,004

Fundraising Staff FTE (Professional)	4.95	5.00	5.00	5.00
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COMPARISONS

Total Philanthropic Productivity as a % of State General Fund	5%	4%	5%	6%
Endowment Market Value as a % of State General Fund	15%	15%		

Net Return on State General Fund Fundraising Investment	233%	223%
State General Fund Fundraising Investment as a % of State General Fund	1.48%	1.10%
State General Fund Advancement Investment as a % of State General Fund	3.07%	2.83%

Total Fundraising Investment as a % of State General Fund	1.61%	1.22%
Total Advancement Investment as a % of State General Fund	3.32%	3.04%

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