

AGENDA

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Meeting: 10:30 a.m., Wednesday, January 27, 2010
Glenn S. Dumke Auditorium

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

Consent Item

Approval of Meeting Minutes of November 17, 2009

Discussion Items

1. Naming of an Academic Entity – California State University, Fresno, *Action*
2. Naming of a Facility – California State University, Stanislaus, *Action*
3. Approval of the 2008-2009 Annual Report on External 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 17, 2009

Members Present

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

Approval of Minutes

The minutes of September 22, 2009 were approved by consent as submitted.

Naming of a Campus Facility – California State University, San Bernardino

Trustee Gowgani announced that this item requested a technical change to a previously approved naming of a museum facility at California State University, San Bernardino. The donor formally proposed that the museum be renamed the Robert and Frances Fullerton Museum of Art to recognize the contributions of his first wife.

The committee recommended approval of the proposed resolution (RGR 11-09-08).

Naming of a Campus Facility – California Polytechnic State University, San Luis Obispo

Trustee Gowgani asked Vice Chancellor for University Relations and Advancement Mr. Garrett P. Ashley to present the request to name Building D, in the Construction Innovations Center, at California Polytechnic State University, San Luis Obispo, as the Simpson Strong-Tie Materials Demonstration Laboratory.

Mr. Ashley relayed that the proposed naming recognizes Simpson Strong-Tie Company for its founding gift of \$500,000 in support of the laboratory facility within the College of Architecture and Environmental Design (CAED).

President Baker commented that Simpson Strong-Tie Company is one of the leading structural connector manufacturers in the United States, Canada, Asia and Europe. The laboratory will provide an interdisciplinary “heart” for materials exploration and experimentation to support instruction and related research with the CAED, and will serve as a shared learning environment where the usage of materials can be explored across the five disciplines of the department. President Baker also expressed that Cal Poly San Luis Obispo is proud of the longstanding partnership that they have had with the company, which has generously provided resources to the College of Architecture and Environmental Design; funded scholarships for students; and sponsored numerous forums and events on campus for the benefit of students, faculty and practitioners. He personally thanked Allen Hanson, Regional Sales Manager for Simpson Strong-Tie Company, for his personal involvement with the university, and recognized the contributions of the Cal Poly alumni who are employed with the company.

The committee recommended approval of the proposed resolution (RIA 11-09-10).

Chancellor Reed thanked Simpson Strong-Tie Company for its continued support of Cal Poly San Luis Obispo. He shared that the gift will allow many of our students to take part in specialized training that will prepare them for professional careers in the engineering, architecture and construction fields.

Allen Hanson of Simpson Strong-Tie Company thanked the CSU for the naming honor. He noted that many architectural engineers and other employees in their company are proud graduates of Cal Poly San Luis Obispo. In the spirit of paying it forward, the company holds an annual workshop on the campus to assist in establishing a career path for Cal Poly students.

Chancellor Reed and Chair Carter presented Mr. Hanson with a framed resolution certificate recognizing the commendation.

Naming of an Academic Entity – California State University, Chico

Trustee Gowgani asked Mr. Ashley to present the request to name the Museum of Anthropology, at California State University, Chico, as the Valene L. Smith Museum of Anthropology.

Mr. Ashley noted that the item was amended to reflect that it is an academic entity naming as opposed to a campus facility naming. The naming recognizes Dr. Smith for her past and future contributions to the campus’s Museum of Anthropology, which total more than \$4.6 million. Her gift will be directed toward the museum’s operational, program and capital expenditures.

President Zingg commended Dr. Smith on a remarkable 31-year career at the university and for her efforts in pioneering the field of Anthropology, particularly the area of tourism, which she essentially created. Dr. Smith is a Fulbright lecturer, was named outstanding educator of America three times, and has been recognized twice by the CSU as professor and educator of the year. President Zingg also noted that Dr. Smith’s gift is the second gift of this size in recent

years from a former faculty member of Chico State, which underscores the affection for and confidence in the university that the faculty has. He noted that faculty members teach in the command of their disciplines and the force of their personal example, and Dr. Smith has been extraordinary in both regards.

The committee recommended approval of the proposed resolution (RIA 11-09-11).

Trustee Gowgani adjourned the meeting.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Naming of an Academic Entity – California State University, Fresno

Presentation By

Garrett P. Ashley
Vice Chancellor
University Relations and Advancement

Summary

This item will consider naming an academic entity in the Kremen School of Education and Human Development at California State University, Fresno as the Maxima A. Dandoy Center for Academic Excellence in memory of the late Dr. Maxima A. Dandoy.

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

Background

An \$875,000 gift was received from the estate of retired Fresno State professor Dr. Maxima A. Dandoy to establish the Maxima A. Dandoy Center for Academic Excellence (Dandoy Center). Her gift will make a significant impact at the Kremen School of Education and Human Development at the campus. It will ensure a strong commitment to excellence within curriculum and instruction, and will implement initiatives that benefit students pursuing their degree in education.

Dr. Dandoy served as a professor at Fresno State from 1956 until her retirement in 1987. A native of the Philippines, she died January 31, 2009 leaving her estate to the Kremen School. Dr. Dandoy came from a family of educators. Her parents, Manuel and Isadora Antonio, and three siblings were educators. After her teacher training, she taught in her hometown. While earning her degree in 1947 from National Teachers College, she concurrently taught and wrote curriculum for public schools throughout the Philippines. She earned her doctorate in education from Stanford University in 1957, the same year she received her American citizenship. Before accepting a position with Fresno State, she served as an adjunct faculty member at UCLA.

The realization of the Dandoy Center will bring recognition and visibility to the important work of the Kremen School. It will allow the school to advance critical programs that enhance the learning environment such as: faculty research and development, a lecture and seminar series, graduate student assistance, assessment, and other methodological and innovative programs. Moreover, it will enable those who strive for excellence to reach beyond the usual boundaries or limitations and achieve their goals. This program will provide support that is unavailable from the State of California.

The Dandoy Center will support the following efforts:

- 1) Leadership Activities for Faculty Research – funding assistance will be provided by the Dandoy Center to support faculty research projects;
- 2) Lecture Series – the Dandoy Center will fund visiting lecturers and scholars from outside the university;
- 3) Scholarship – financial assistance through scholarships for education students will be provided by the Dandoy Center;
- 4) Professional Activities for Faculty Development – activities funded in this category include: organizing and coordinating professional development programs, faculty presentations and attendance at professional development conferences, consultants, and stipends for faculty to attend these programs; and
- 5) School Enhancements – leading the way in education, the Dandoy Center will support the Kremen School of Education’s most pressing needs to advance excellence in education.

The following resolution is recommended for approval:

RESOLVED, by the Board of Trustees of the California State University, that the Center for Excellence in the Kremen School of Education and Human Development at California State University, Fresno be named the Maxima A. Dandoy Center for Academic Excellence in the Kremen School of Education and Human Development.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Naming of a Facility – California State University, Stanislaus

Presentation By

Garrett P. Ashley
Vice Chancellor
University Relations and Advancement

Summary

This item will consider naming the Warrior Arena at California State University, Stanislaus as the Ed and Bertha Fitzpatrick Arena.

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

Background

The proposed naming of the Warrior Arena recognizes the \$500,000 commitment by Mr. Ed Fitzpatrick, Owner and President of Valley Lexus, Valley Infiniti, and Valley BMW in Modesto, California, and his wife Bertha. Mr. Fitzpatrick is a successful and inspirational business leader. He became the first African American to receive the Lexus franchise and has been recognized as a leader in his industry. His numerous accomplishments include being listed on the *Black Enterprise Auto Dealer 100* list, recognized as the Auto Dealer of the Year by *Black Enterprise* magazine, and being awarded the Entrepreneurial Spirit Award by *Minorities In Business* magazine.

Ed and his wife Bertha Fitzpatrick have a longstanding relationship with CSU Stanislaus, including their active support of the Warrior Athletics program. Ed has served as a strong and valuable member of the University's Foundation Board since 2003. The gift from the Fitzpatricks will enhance the reputation of Warrior Athletics as a national contender and will be used to augment scholarships and help recruit the best and brightest student-athletes with a goal of capturing conference and national championships.

The following resolution is recommended for approval:

RESOLVED, by the Board of Trustees of the California State University, that Warrior Arena at California State University, Stanislaus be named the Ed and Bertha Fitzpatrick Arena.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Approval of the 2008-2009 Annual Report on External Support to the California State University

Presentation By

Garrett P. Ashley
Vice Chancellor
University Relations and Advancement

Lori A. Redfearn
Assistant Vice Chancellor
Advancement Services

Summary

This item presents information on external support received by the 23-campus California State University system from July 1, 2008 to June 30, 2009. Section 89720 of the Education Code requires that an annual gift report be submitted to the California Postsecondary Education Commission, 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/0809externalsupport.

Overview

Over the past three years, the California State University has averaged \$378 million in gift commitments, including over \$366 million designated in 2008-09. Donors continued to invest in student success and academic excellence despite a prolonged recession.

Gift commitments include new gifts, pledges and testamentary provisions recorded during the period. This accrual method of reporting reflects the hard work of academic leaders, professional fundraising staff and countless volunteers who assist in the CSU's fundraising success.

Charitable gift receipts, a combination of new gifts and pledge payments, totaled greater than \$260 million—a mere 1 percent decrease from 2007-08. This cash method of reporting indicates resources that have been received and invested in the CSU's students, faculty and programs.

Within these gift receipts, the CSU received nearly \$173 million to enhance the margin of excellence in current university objectives:

- \$15.2 million for student scholarships
- \$77.2 million for academic programs
- \$9.6 million for applied research
- \$2.5 million for faculty compensation
- \$1.6 million for library operations
- \$14.4 million for athletics
- \$23.8 million for public service programs
- \$1.9 million for physical plant operations
- \$26.7 million for other university needs

To support the future capacity of the university, almost \$25 million was contributed to build state-of-the-art libraries, technologically advanced laboratories, contemporary performing arts centers, and expanded athletic facilities. Additionally, donors added \$39 million to university endowments, creating a lasting legacy of support. Irrevocable deferred gifts accounted for just about \$17 million in future support.

Of all charitable gifts received, 98 percent were designated to specific interests identified by the donor. Only \$6.5 million received was unrestricted and available to be directed to the university's most pressing needs.

In addition to charitable support, the university received over \$1.5 billion in operating grants and contracts revenue. This included \$268.5 million in one-time stimulus funds from the 2009 Federal American Recovery and Reinvestment Act (ARRA). Federal grants reported include student financial aid of \$423 million in Pell Grants, \$11.5 million in State Educational Opportunity Grants, and \$16 million for work study programs.

The following resolution is recommended for approval:

RESOLVED, by the Board of Trustees of the California State University, that the Board adopts the *2008-2009 Annual Report of External Support to the California State University* for submission to the California Postsecondary Education Commission, the California Joint Legislative Budget Committee, and the California Department of Finance.

2008-09 EXTERNAL SUPPORT ANNUAL REPORT

www.calstate.edu

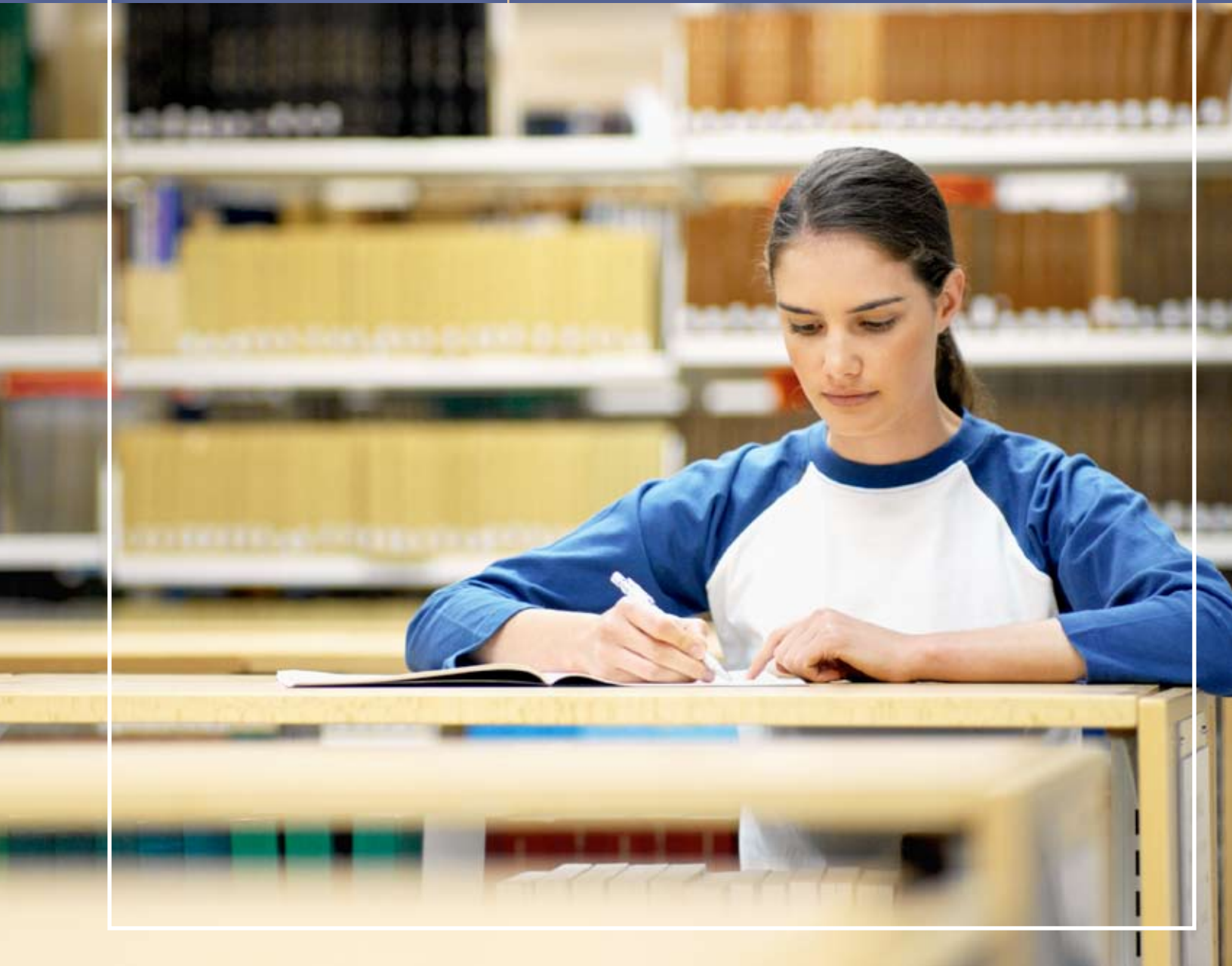


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Campus-specific external support information for 2008-09 is available online at www.calstate.edu/ua/reports/0809externalreport.



2008/09 William R. Hearst/CSU Trustees' Award for Outstanding Achievement honorees attending the awards ceremony at the September 2009 CSU Board of Trustees meeting:

- First row, left to right:* Nancy E. Calderón, San Diego State University; Linnea L. Hoffmann, CSU Monterey Bay; Suzanne P. Pullen, San Francisco State University; Araciél Juárez, CSU Los Angeles; Rachel E. Grider, CSU Stanislaus; Ger Thao, CSU Chico; Megan A. Saraceni, CSU Northridge; Alisa S. Carithers, Cal Poly Pomona; Katherine R. Brookshier, California Maritime Academy; Tanisha Washington, CSU Long Beach
- Second row, left to right:* Nataliya Richmeier, CSU San Bernardino; Daniel L. Cole, CSU Fullerton; RosaAngelica Vogel, CSU San Marcos; Ramon Gabriel Figueroa, CSU Sacramento; Scarlett Aufmann, CSU Dominguez Hills; Jordon M. Williams, Sonoma State University; Lauren Jacobs, CSU Bakersfield; Travis J. Tubandt, CSU Fresno
- Third row, left to right:* Phi Nguyen, Humboldt State University; Mike Abary, Senior Vice President of Sony - IT Products; Andre L. Wilson, CSU East Bay; Josué Magaña, CSU Channel Islands; Angelina M. Loyola, San José State University
- Not Pictured:* Phong V. Dang, Cal Poly San Luis Obispo

Message from the Chancellor



There is no doubt that the 2008-09 academic year brought unprecedented challenges to the California State University. The state's budget deficit, now nearing more than \$20 billion, has resulted in a record \$564 million cut to the CSU's budget, equivalent to 20 percent.

We have responded by adjusting our operations and finding innovative ways to deliver our services. But we have not veered from our mission—to provide access to a high-quality education for all students of California. Considering that the CSU graduates 91,000 students annually into the state's competitive industries—more students than all other California universities and colleges combined—our mission is crucial to the state's economic recovery.

In fact, when you look at the numbers, the California State University is indispensable to California's economic prosperity. For every \$1 the state invests in the CSU, the CSU returns more than \$4. The CSU sustains more than 200,000 jobs in the state. And CSU-related expenditures create \$13.6 billion in economic activity.

And when you look at our students, the CSU represents the best of the nation's diversity. Fifty-six percent of CSU students are students of color and 40 percent come from households where English is not the primary language spoken. Nearly 35 percent of students attending the CSU are the first generation in their family to attend college.

Reaching these students and their families is one of the CSU's greatest challenges today. The CSU must continue to prepare the future generations of Californians who will become the state's next workforce, especially those that do not have strong traditions of going to college. The CSU has developed partnerships in African American churches, Latino neighborhoods, Asian community centers, Native American reservations, and on military bases. A "Road to College" bus tour annually brings college-related information directly to students, parents and counselors in communities throughout California.

Our donors and supporters are crucial to our success. They give us the vital backing we need to carry out these efforts, all of which serve our students, and ultimately our workforce and our state.

My deep appreciation goes to all of those who made the commitment to enhance our programs, fulfill our critical mission and, most importantly, help more students achieve their dreams. Your continued support and generosity will help us remain resilient in these unpredictable times.

A handwritten signature in black ink that reads "Charles B. Reed". The signature is written in a cursive, flowing style.

Charles B. Reed
Chancellor
California State University

Overview of External Support



Over the past three years, the California State University has averaged \$378 million in gift commitments, including over \$366 million designated in 2008-09. Donors continued to invest in student success and academic excellence despite a prolonged recession.

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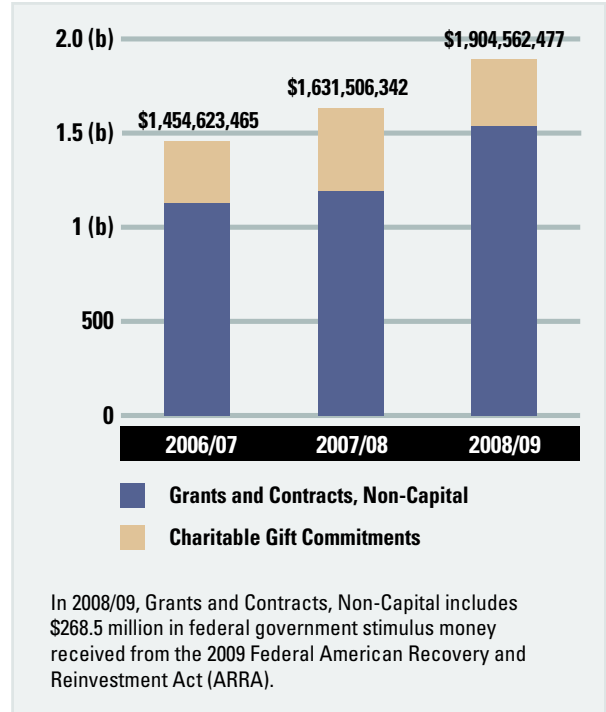
Of all charitable gifts received, 98 percent were designated to specific interests identified by the donor. Only \$6.5 million received was unrestricted and available to be directed to the university's most pressing needs.

In addition to charitable support, the university received over \$1.5 billion in operating grants and contracts revenue. This included \$268.5 million in one-time stimulus funds from the 2009 Federal American Recovery and Reinvestment Act (ARRA). Federal grants reported include student financial aid of \$423 million in Pell Grants, \$11.5 million in State Educational Opportunity Grants, and \$16 million for work study programs.

Three-Year History of External Support

The last three years the California State University has averaged over \$1.6 billion in external support annually to help achieve its mission. While the CSU depends on state funds to support core educational functions, the university increasingly relies on the generosity of private donors and government partners. This support is not a substitute for state support but, rather, provides a margin of excellence that helps the CSU have enormous impact on California's economic, social and cultural prosperity.

With over \$1.9 billion for 2008-09, the CSU surpassed last year's record amount with a 17 percent increase in external support attributable to the \$268.5 million in federal government stimulus money received from the 2009 Federal American Recovery and Reinvestment Act (ARRA). The ARRA funds did not enhance support to the institution but, rather, helped mitigate a funding gap created by severe state budget cuts. When the ARRA support is adjusted out of the totals, CSU external support increased by merely \$4.5 million, which is less than 1 percent over the prior year.



Three-Year History of External Support



**President Michael Ortiz,
Carol Collins and
James A. Collins**

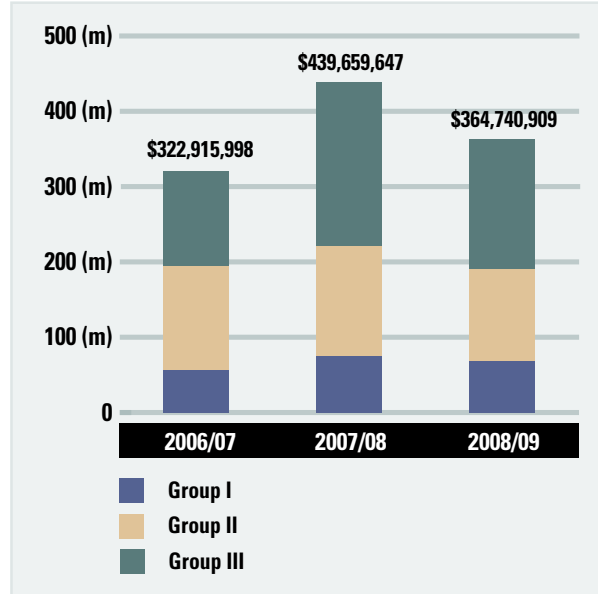
Hospitality is an evolving, fast-paced global industry. At **The Collins College of Hospitality Management**, students are engaged in a learn-by-doing environment so they are prepared to be leaders in this dynamic field.

The Collins College of Hospitality Management is consistently ranked among the nation's premier hospitality management programs. Founded in 1973, the program is the first and largest four-year hospitality management degree program in California. A customized curriculum prepares students for careers in restaurant management, hotel/resort management, club management, culinary product development, tourism management, and special events/meeting planning.

In 2008-09, James A. Collins, chairman emeritus of Sizzler International, and his wife, Carol, pledged \$5 million to construct a new academic building to expand the Collins College programs. Mr. and Mrs. Collins previously contributed \$10 million to establish the college.

Benchmarking Performance

As a system, the university seeks to raise gift commitments in excess of 10 percent of the state general fund allocation. To reach this achievement, campuses have been divided into three peer groups to benchmark performance related to philanthropic productivity. The eleven Group I campuses are striving to build the capacity to raise gift commitments equivalent to 10 percent of the state general fund allocation. The eight Group II campuses seek to raise between 10 and 15 percent of the state general fund allocation. The four Group III campuses endeavor to raise more than 15 percent of the state general fund allocation. The factors for determining peer groups include the number of full-time professional fundraisers, the number of individual donors, and the endowment market value, which are outlined on appendix Chart III. These factors have been determined as the leading indicators for fundraising success.



Three-Year History of Gift Commitments by Group

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

	2006/07	2007/08	2008/09
Gift Commitments*	\$325,812,908	\$441,740,420	\$366,390,355
State General Fund	\$2,591,032,455	\$2,803,801,463	\$2,795,240,005
Total Gift Commitments as a % of State General Fund Allocation	13%	16%	13%
Group I Average	8%	10%	9%
Group II Average	12%	12%	10%
Group III Average	19%	30%	24%
System Average	13%	16%	13%

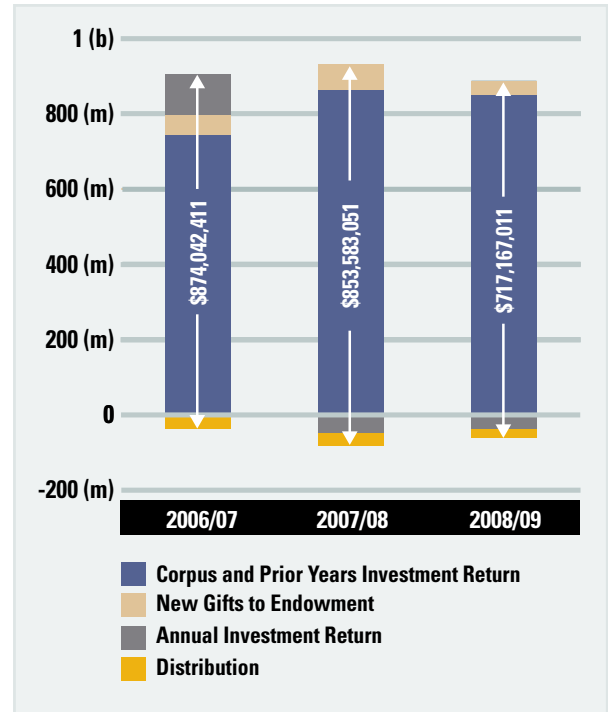
* Includes gift commitments to Chancellor's Office

Endowment

Due to the significant downturn in the financial markets, the CSU experienced a 16 percent decrease in the value of the endowment during 2008-09, down to \$717 million from \$854 million in 2007-08.

In 2008-09, donors contributed \$39 million in new gifts toward endowments, a decrease of 43 percent from the prior year. Over a three-year period, \$158 million in new endowment gifts has been added to endowments throughout the CSU. As state resources diminish, these assets are important for protecting the financial health of the institution as evident in the endowment earnings distribution. Collectively, CSU institutions distributed an average of over \$30 million from endowment the past three years. This year, over \$26 million was distributed in support of the university's students, faculty and programs.

Negatively affected by the turmoil in the financial markets, the system experienced a 17 percent loss in investment returns during 2008-09. Peer group and systemwide investment returns are presented as dollar-weighted averages.



Endowment Market Value

Endowment Investment Performance

Investment Pool Asset Range	# CSU	CSU Average Investment Return
>\$100 M to ≤\$500 M	1	-18.50%
>\$50 M to ≤\$100 M	2	-15.91%
>\$25 M to ≤\$50 M	7	-18.65%
≤\$25 M	13	-15.74%

2008/2009 CSU Median = -16.2%

2008/2009 Industry Benchmark: Russell 3000 65% and Barclay's Aggregate Bond Index 35% = -16.07%

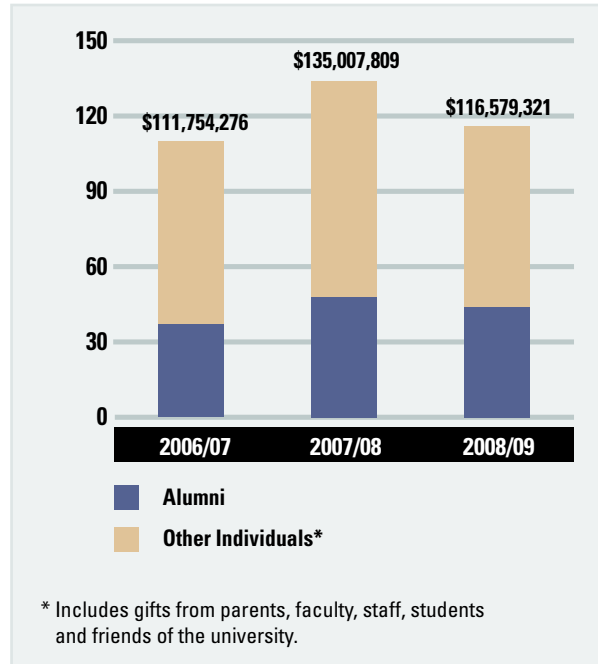
2008/2009 NACUBO National University Average = -19.0%

Individuals

Gifts from individuals include giving from alumni, parents, faculty, staff, students and friends of the university. In 2008-09, gift receipts from individuals decreased \$18.5 million (or 14 percent) to \$116.5 million.

The number of donors is a key indicator of success in attracting private support to the university. Despite the decrease in individual giving dollars received, the number of individuals giving to the CSU remained relatively stable, with 218,612 individual donors this year compared to 219,421 in 2006-07 and 221,410 in 2007-08.

In 2008-09, alumni donors made up 32 percent of individual donors and contributed over \$44 million (or 38 percent of giving from individuals), with an average of \$638 per gift. Alumni additionally supported the university with nearly \$2 million in membership dues.



Individual Giving to the CSU



Dr. Charles Boyer, Dean (CAST); and Dee Jordan

When a retired **CSU Fresno agriculture professor** shared his enthusiasm for his college's programs at a social gathering years ago, he never suspected that the result would be a \$29 million cash gift from Hanabul "Bud" Jordan, his wife, Dee, and his brother, Lowell.

The Jordan family is from the East Bay, where Bud owned and operated a construction business headquartered in Hayward and where Lowell lived on the family ranch in Dublin, tending to the family's cattle.

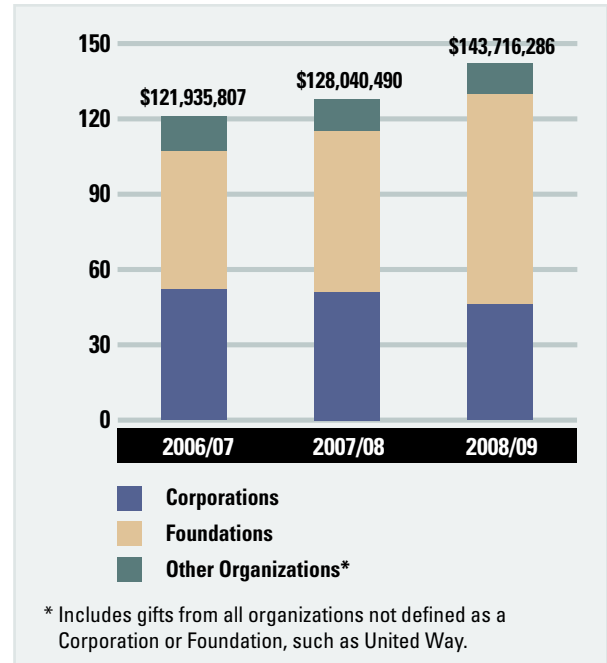
The Jordan family gift will be used for research and facilities for the College of Agricultural Sciences and Technology (CAST). "This incredible gift will fund projects that the college had only just dreamed of," President John Welty said. "It's a rare and wonderful opportunity to make a profound impact on the college. We know we have outstanding, world-class agriculture programs. This gift will definitely establish Fresno State as the university of choice for top agriculture students."

Organizations

Gifts from organizations include giving from corporations, foundations and other organizations such as the United Way. In 2008-09, gift receipts from organizations increased \$15.6 million (or 12 percent) to \$143.7 million.

Corporations donated \$46 million, including three gifts of \$1 million or more, one each received by Long Beach, Northridge and San Francisco. Of the total received from corporations, company products accounted for over \$3 million (up from \$2 million last year). Corporations also support educational priorities by matching contributions from their employees. Over 3,000 matching gifts enhanced the value of individual contributions by \$1.5 million.

Foundation contributions increased 32 percent from the prior year, equaling one-third of all charitable gift receipts this year. With 1,067 contributions, private foundations, including family foundations, contributed \$85 million, including a \$29.4 million gift from a family foundation in support of the CSU Fresno agricultural program. Eleven gifts of \$1 million or more were received by five universities, including Channel Islands, Fresno, Long Beach, San Diego and San Francisco.



Organization Giving to the CSU



Dr. Ali C. Razi, Trustee

The **William Randolph Hearst/CSU Trustees' Award** for Outstanding Achievement is given each year to those students who demonstrate superior academic performance, personal accomplishments, community service, and financial need. These scholars have overcome tremendous life challenges to pursue a college degree, and their personal stories are inspiring.

Dr. Ali C. Razi, Trustee Emeritus of the CSU Board of Trustees, is credited with keeping the Hearst Trustee scholarship in operation when funding for the program was in doubt. He personally "stepped up to the plate" and inspired others to do the same. In 2006, Razi endowed a scholarship fund to recognize the top recipients of this prestigious award, and he continues to make annual contributions.

Son of an educator, Razi is the president of the Stratham Group, a real estate investment and development firm based in Irvine, Calif., where he has worked since 1984. He is a respected leader in the Iranian-American community and a former consul member of the World Affairs Council of Orange County.

System Highlights

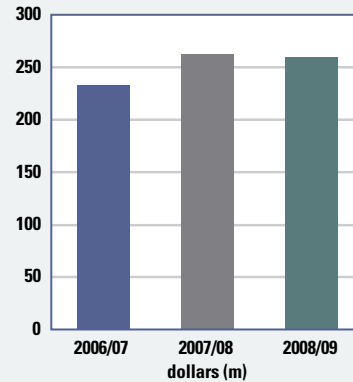
- AT&T Road to College Tour empowers students, parents, teachers and counselors with information about how to prepare for college. The tour, which moves about the state by way of a 40 foot biodiesel bus, garnered awards from the International Association of Business Communicators and the Council for Advancement and Support of Education.
- The Boeing Company contributed \$35,000 for the CSU Informal Science Institutes Professional Development program and another \$50,000 to the CSU Mathematics Professional Development Program. Both programs provide professional development in their respective fields for teachers of grades K-12 to improve academic achievement in Southern California's students.
- Mr. and Mrs. Stanley T. Wang, Trustee Emeritus, made a gift of \$120,000 for the Wang Family Scholarship. This scholarship not only provides an opportunity for students to prepare for a role in the international business world, but it recognizes the increasing importance of international education and economic globalization by supporting study, teaching, and research abroad for students and faculty members in China and Taiwan.
- Super Sunday is a unique initiative formed through a partnership with local leaders of church, civic and business organizations to promote a college-going culture among African American students. What began with 24 churches has now expanded to include 72 churches and has led to the development of companion college fair events called Super Saturday.

Gift Commitments 2008/09	
New Gifts	\$213,633,070
New Pledges	57,940,590
Testamentary Commitments	91,946,068
Native American and Local Government Contributions	2,870,626
Total	\$366,390,355

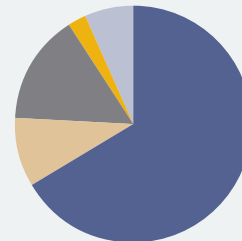
Grants and Contracts Revenue 2008/09	
Federal	\$826,619,767
Federal ARRA Grant	268,500,000
State and Local	357,740,945
Non-Governmental	84,291,614
Total	\$1,537,152,326

Charitable Gift Receipts	
New Gifts	\$213,633,070
Pledge Payments	\$46,662,536
2008/09 Total	\$260,295,608

Charitable Gifts: A 3-Year History

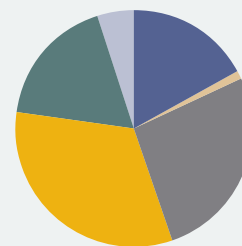


Charitable Gifts by Gift Disbursement



Programs	66.50%
Campus Improvements	9.54%
Endowment	14.98%
Unrestricted	2.49%
Other	6.48%

Charitable Gifts by Source of Gift



Alumni	17.04%
Parents	1.27%
Other Individuals	26.48%
Foundations	32.56%
Corporations	17.86%
Other Organizations	4.79%

Board of Trustees Recognitions



The CSU Board of Trustees recognized leadership gifts to the university by naming the following academic programs or facilities in 2008-09:

- San Francisco State University named the Mashouf Creative Arts Center in honor of two San Francisco State alumni, Mr. Manny Mashouf and Ms. Neda Mashouf. The Mashouf family pledged \$10 million toward construction of a new state-of-the-art center for the university's broadcasting, digital media, and performing arts programs.
- The Joseph A. W. Clayes III Performing Arts Center was named in recognition of a former student body president and self-made man, who became a successful real estate investor and avocado rancher, and his family's \$5 million commitment—the second largest pledge of cash in California State University, Fullerton's history.
- San Diego State University named the Charles W. Lamden School of Accountancy to recognize the \$10 million gift made by Gertrude Lamden in honor of her late husband, Dr. Charles W. Lamden. The gift marks the first time in San Diego State's 111-year history that a school was named after an individual.
- The Adult Re-Entry Center at California State University, San Bernardino was renamed the Osher Adult Re-Entry Center to recognize the \$1 million endowment provided through the generosity of the Bernard Osher Foundation.
- Namings at California State University, Fresno included the Lyles College of Engineering in recognition of Mr. William M. Lyles, his family and their companies' \$10 million gift commitment; and the Jordan College of Agricultural Sciences and Technology named in memory of the late Hanabul "Bud" Jordan and the Jordan family. The \$29.4 million cash gift to the College of Agricultural Sciences and Technology is the largest single cash gift ever received by CSU Fresno and is to be used to support facilities and research in the College.
- California State University, Bakersfield named the new baseball training and playing facility Hardt Field in honor of the \$1 million gift by alumnus Thomas (Tom) Hardt and Barbara Hardt, as well as the donation of on-going general contracting work. Specifically, their generous donation supports the construction of the new, on-campus, top-level baseball training and playing facility, a critical component of the athletics program's move to NCAA Division I.
- California Maritime Academy named the School of Maritime Policy and Management as the ABS School of Maritime Policy and Management and the Radar Lab Building as ABS Lecture Hall. The ABS (formerly The American Bureau of Shipping) company is the preeminent classification and certification society in maritime administration acting on behalf of more than 100 governments. This \$3 million gift in support of the School of Maritime Policy and Management is the largest gift in the history of California Maritime Academy.
- Carol and James A. Collins, the namesakes and primary benefactors of The Collins College of Hospitality Management, once again showed tremendous generosity to California State Polytechnic University, Pomona by pledging to match dollar for dollar \$5 million in donations for a \$10 million academic building, which will employ green building design and lay the foundation for expanded programs at The Collins College, which has seen a 46 percent growth in enrollment in the past three years.

Data Collection Process



The Annual Report on External Support to the California State University includes tables detailing “gift commitments.” Using a reporting convention that is a variation of the accrual system, these tables present what is thought to be the best perspective on the level of current philanthropic productivity. The methodology includes new gifts, new pledges up to five years in duration and new documented testamentary provisions. The philanthropic support total is presented to highlight the results of current year fundraising efforts.

The data presented under “gift receipts” conforms to reporting standards employed by the national Voluntary Support of Education (VSE) Survey conducted by the Council for Aid to Education. This survey is completed by over 85 percent of all colleges and universities for comparative purposes. The VSE survey uses a cash-based methodology that includes new gifts and pledge payments (gift receipts), but does not include new pledges or revocable testamentary provision. This reporting convention is thought to present the best cash flow perspective. The charitable gift source and purpose detail presented in this report utilizes data submitted through the VSE survey.

For the purposes of this report, deferred gifts, pledges and testamentary commitments are recorded at face value. This differs from accounting standards used to produce the annual audited financial statements. In audited financial statements, the gift asset is recorded at the discounted present value. Also based on an accrual method, financial statements record unconditional pledges on the revenue side at the time they are promised, and balance the asset with receivable accounts that are reduced as pledge payments are recorded. Due to the difference in reporting conventions, data presented in this External Support report will vary from the audited financial statements.

Grants and contract data represents figures submitted in the annual audited financial statements under “Grants and Contracts, non-capital.” These numbers are the consolidated total of university and auxiliary income categories as defined below.

- **University Definition**

Grants and Contracts, non-capital – Includes all amounts for which eligibility requirements were met on grants and contracts from federal, state or private agencies that will be used for non-capital purposes. Examples for the CSU include student financial assistance grants such as Pell, SEOG and Work Study.

- **Auxiliary Organization Definition**

Grants and contracts, non-capital [federal, state or non-governmental] – Includes all unrestricted amounts received or made available by grants and contracts for current operations and all amounts received or made available through restricted grants and contracts to the extent expended for current operations. The amount does not include gifts.

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 ongoing commitments through multiyear pledges and support promised through testamentary provisions in wills, trusts and beneficiary designations. 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 foundation and institution 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.

External Support

External support is charitable gift receipts combined with grants and contracts revenue.

Grants and Contracts, Non-capital

This data, reported from the audited financial statements, represents operating support to the institution derived from governmental grants and commercial contracts. These numbers do not include state general fund support.

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

Gifts from persons, 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**

All other persons, including governing board members, who are not classified as either an alumnus or a 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**

Gifts from corporations, 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.

- **Other Organizations**

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

Testamentary Commitments

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

Three Year History and Average

Chart I

	2006/07 Total Gift Commitments	2007/08 Total Gift Commitments	2008/09 Total Gift Commitments	Three Year Average	2006/07 Total Gift Receipts	2007/08 Total Gift Receipts	2008/09 Total Gift Receipts	Three Year Average
GROUP I								
Bakersfield	\$10,710,179	\$4,177,919	\$4,479,320	\$6,455,806	\$8,160,719	\$3,874,067	\$4,315,558	\$5,450,115
Channel Islands	2,019,244	2,959,151	1,950,179	2,309,525	1,239,956	3,021,648	3,642,146	2,634,583
Dominguez Hills	2,342,208	2,197,411	3,627,027	2,722,215	1,322,182	1,907,345	3,335,159	2,188,229
East Bay	4,965,903	1,528,821	2,805,209	3,099,978	6,837,285	1,584,674	1,965,283	3,462,414
Humboldt	4,716,702	2,958,003	4,835,579	4,170,095	4,829,819	3,575,941	3,547,961	3,984,574
Los Angeles	8,714,926	8,760,536	26,142,519	14,539,327	5,175,203	6,857,542	5,259,627	5,764,124
Maritime Academy	584,924	1,114,932	3,995,020	1,898,292	555,924	1,138,932	1,420,020	1,038,292
Monterey Bay	5,365,950	5,110,816	5,557,903	5,344,890	7,441,514	4,598,702	5,241,740	5,760,652
San Bernardino	10,614,878	41,347,421	8,780,755	20,247,685	6,985,385	8,192,199	5,587,937	6,921,840
San Marcos	3,941,428	2,972,637	3,877,713	3,597,259	2,212,498	4,758,078	3,281,022	3,417,199
Stanislaus	3,920,270	2,721,445	2,434,411	3,025,375	3,978,028	1,896,905	1,969,333	2,614,755
PEER GROUP I Total	\$57,896,612	\$75,849,092	\$68,485,635	\$67,410,446	\$48,738,513	\$41,406,033	\$39,565,786	\$43,236,777
GROUP II								
Chico	\$7,120,618	\$10,283,975	\$7,775,239	\$8,393,277	\$4,857,118	\$6,807,545	\$4,695,489	\$5,453,384
Fullerton	9,329,927	34,768,184	14,054,018	19,384,043	9,940,179	11,307,959	14,599,847	11,949,328
Northridge	21,242,726	20,053,527	13,172,900	18,156,384	8,624,980	14,136,987	8,940,339	10,567,435
Pomona	10,962,614	5,176,884	26,971,180	14,370,226	10,117,890	5,537,063	7,913,341	7,856,098
Sacramento	16,245,290	17,987,769	17,084,461	17,105,840	10,205,234	10,243,150	10,040,585	10,162,990
San Francisco	14,474,436	17,537,247	18,078,002	16,696,562	12,590,120	11,525,731	14,905,258	13,007,036
San José	50,570,297	25,731,484	17,841,940	31,381,240	17,624,257	20,128,175	11,684,859	16,479,097
Sonoma	7,462,984	13,607,281	7,621,206	9,563,824	6,124,350	12,900,675	8,675,307	9,233,444
PEER GROUP II Total	\$137,408,892	\$145,146,351	\$122,598,946	\$135,051,396	\$80,084,128	\$92,587,285	\$81,455,025	\$84,708,813
GROUP III								
Fresno	\$25,866,712	\$23,844,296	\$53,178,107	\$34,296,372	\$15,220,957	\$16,757,909	\$44,633,482	\$25,537,449
Long Beach	27,344,890	33,939,844	31,992,835	31,092,523	14,843,098	26,486,900	22,718,759	21,349,586
San Diego	46,631,518	66,087,198	62,224,217	58,314,311	49,618,328	65,147,988	50,028,226	54,931,514
San Luis Obispo	27,767,374	94,792,866	25,241,373	49,267,204	22,699,148	18,507,411	19,190,088	20,132,216
PEER GROUP III Total	\$127,610,494	\$218,664,204	\$172,636,532	\$172,970,410	\$102,381,531	\$126,900,208	\$136,570,555	\$121,950,765
Chancellor's Office	\$2,896,910	\$2,080,773	\$2,669,242	\$2,548,975	\$2,485,910	\$2,154,773	\$2,704,242	\$2,448,308
SYSTEMWIDE Total	\$325,812,908	\$441,740,420	\$366,390,355	\$377,981,228	\$233,690,082	\$263,048,299	\$260,295,608	\$252,344,663

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.

Grants and Contracts Revenue, Non-Capital

2008/09 Fiscal Year

Chart II

	Federal	Federal ARRA Grant*	State and Local	Non-Governmental	Total Grants and Contract Revenue
GROUP I					
Bakersfield	\$17,819,198	\$5,877,200	\$8,178,911	\$496,762	\$32,372,071
Channel Islands	4,203,971	4,130,200	1,944,166	515,859	10,794,196
Dominguez Hills	22,467,766	6,902,900	8,335,847	926,146	38,632,659
East Bay	20,742,731	8,615,200	6,822,038	1,498,447	37,678,416
Humboldt	18,627,337	7,314,200	8,300,459	2,081,379	36,323,375
Los Angeles	52,170,408	12,771,300	15,264,461	1,431,722	81,637,891
Maritime Academy	2,133,739	1,825,200	282,674	172,250	4,413,863
Monterey Bay	13,928,050	5,087,900	4,235,082	1,213,317	24,464,349
San Bernardino	43,297,797	10,216,100	15,598,381	3,200,329	72,312,607
San Marcos	12,986,815	6,448,000	3,756,050	1,175,037	24,365,902
Stanislaus	14,001,427	6,075,300	8,363,436	301,126	28,741,289
PEER GROUP I Total	\$222,379,239	\$75,263,500	\$81,081,505	\$13,012,374	\$391,736,618
GROUP II					
Chico	\$35,611,338	\$11,505,600	\$17,477,403	\$3,147,691	\$67,742,032
Fullerton	41,604,225	17,251,200	22,028,905	2,620,384	83,504,714
Northridge	60,119,514	18,635,700	22,754,004	4,011,327	105,520,545
Pomona	34,046,972	14,000,700	15,659,384	2,280,674	65,987,730
Sacramento	44,266,037	15,886,700	48,286,116	4,576,878	113,015,731
San Francisco	65,064,029	16,385,900	24,445,368	8,559,898	114,455,195
San Jose	45,690,376	16,052,100	29,027,458	9,354,767	100,124,701
Sonoma	17,356,447	6,134,800	4,203,474	1,198,415	28,893,136
PEER GROUP II Total	\$343,758,938	\$115,852,700	\$183,882,112	\$35,750,034	\$679,243,784
GROUP III					
Fresno	\$50,870,748	\$14,740,500	\$23,333,078	\$7,344,074	\$96,288,400
Long Beach	64,464,258	19,659,100	25,880,044	4,097,246	114,100,648
San Diego	121,070,814	21,232,500	33,010,385	18,077,161	193,390,860
San Luis Obispo	23,541,801	14,279,000	10,554,628	5,338,348	53,713,777
PEER GROUP III Total	\$259,947,621	\$69,911,100	\$92,778,135	\$34,856,829	\$457,493,685
Chancellor's Office	\$533,969	\$7,472,700	-\$807	\$672,377	\$8,678,239
SYSTEMWIDE Total	\$826,619,767	\$268,500,000	\$357,740,945	\$84,291,614	\$1,537,152,326

*Federal government stimulus money received from the 2009 Federal American Recovery and Reinvestment Act.

Note 1: Chancellor's Office State and Local number includes adjustments for transfers of grants between the Chancellor's Office and campuses.

Charitable Gifts

2008/09 Fiscal Year Campus Detail

Chart III

	New Charitable Gifts	Native American and Local Government Contributions	New Pledges	Testamentary Commitments	Total Gift Commitments	2008/09 General Fund	Gift Commitments as a Percent of the General Fund	Prior Year Pledge Write-offs
GROUP I								
Bakersfield	\$2,985,245	\$0	\$821,874	\$672,201	\$4,479,320	\$61,239,052	7%	-\$197,091
Channel Islands	1,488,285	29,600	432,294	0	1,950,179	43,032,603	5%	-99,146
Dominguez Hills	2,809,500	0	758,027	59,500	3,627,027	71,927,143	5%	-12,660
East Bay	1,786,718	0	38,491	980,000	2,805,209	89,778,621	3%	0
Humboldt	3,230,605	10,509	1,594,465	0	4,835,579	76,210,440	6%	-100,569
Los Angeles	4,741,591	0	425,928	20,975,000	26,142,519	133,080,149	20%	-251,691
Maritime Academy	1,414,020	0	2,506,000	75,000	3,995,020	19,018,281	21%	0
Monterey Bay	4,855,795	13,000	689,108	0	5,557,903	53,009,703	10%	-43,557
San Bernardino	3,244,288	561,836	3,546,380	1,428,250	8,780,755	106,451,088	8%	-2,560
San Marcos	2,456,642	5,500	1,415,571	\$0	3,877,713	67,185,822	6%	0
Stanislaus	1,739,051	250	695,110	\$0	2,434,411	63,303,857	4%	-2,876,710
PEER GROUP I Total	\$30,751,740	\$620,695	\$12,923,249	\$24,189,951	\$68,485,635	\$784,236,759	9%	-\$3,583,984
GROUP II								
Chico	\$4,392,739	\$0	\$0	\$3,382,500	\$7,775,239	\$119,890,742	6%	\$0
Fullerton	9,515,002	250	4,538,766	0	14,054,018	179,775,337	8%	-33,193
Northridge	5,993,873	0	2,324,027	4,855,000	13,172,900	194,191,936	7%	-304,330
Pomona	7,378,914	0	5,925,250	13,667,016	26,971,180	145,896,192	18%	0
Sacramento	9,694,185	0	60,276	7,330,000	17,084,461	165,622,497	10%	0
San Francisco	7,427,455	0	5,392,505	5,258,042	18,078,002	170,761,449	11%	-60,272
San José	10,134,649	0	1,429,291	6,278,000	17,841,940	167,277,822	11%	0
Sonoma	6,302,298	35,213	899,693	384,002	7,621,206	63,925,273	12%	-7,477,189
PEER GROUP II Total	\$60,839,115	\$35,463	\$20,569,808	\$41,154,560	\$122,598,946	\$1,207,341,248	10%	-\$7,874,984
GROUP III								
Fresno	\$38,838,234	\$2,519,268	\$11,659,600	\$161,005	\$53,178,107	\$153,592,512	35%	-4,230,550
Long Beach	19,550,613	-332,500	4,382,651	8,392,071	31,992,835	204,868,758	16%	0
San Diego	47,056,114	27,700	3,176,922	11,963,481	62,224,217	221,267,746	28%	0
San Luis Obispo	13,928,013	0	5,228,360	6,085,000	25,241,373	148,796,428	17%	-93,400
PEER GROUP III Total	\$119,372,974	\$2,214,468	\$24,447,533	\$26,601,557	\$172,636,532	\$728,525,444	24%	-\$4,323,950
Chancellor's Office	\$2,669,242	\$0	\$0	\$0	\$2,669,242	\$75,136,554	4%	\$0
SYSTEMWIDE Total	\$213,633,070	\$2,870,626	\$57,940,590	\$91,946,068	\$366,390,355	\$2,795,240,005	13%	-\$15,782,918

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.

Note 2: Long Beach's Native American & Local Government Contributions number includes an adjustment for a revocable gift, which became irrevocable, in order to avoid double-counting.

Charitable Gifts Receipts by Source

2008/09 Fiscal Year

Chart IV

	Individuals			Organizations			Gift Receipts Total	Total Number Individual Donors
	Alumni	Parents	Other Individuals	Foundations	Corporations	Other Organizations		
GROUP I								
Bakersfield	\$117,399	\$7,828	\$658,039	\$538,884	\$2,427,934	\$565,474	\$4,315,558	932
Channel Islands	18,192	12,524	826,938	2,218,015	398,972	167,505	3,642,146	1,105
Dominguez Hills	102,645	10,752	1,512,459	516,171	1,090,817	102,315	3,335,159	1,469
East Bay	386,807	8,419	383,131	549,661	537,891	99,374	1,965,283	2,104
Humboldt	640,583	99,568	603,577	1,666,003	436,638	101,592	3,547,961	7,611
Los Angeles	1,915,506	1,435	687,335	1,391,539	1,119,498	144,314	5,259,627	4,577
Maritime Academy	330,355	20,065	125,874	\$26,500	805,874	111,352	1,420,020	584
Monterey Bay	8,060	11,925	2,990,038	924,529	704,529	602,659	5,241,740	4,809
San Bernardino	192,422	210,189	2,839,608	917,248	1,315,549	112,920	5,587,937	2,824
San Marcos	36,212	11,897	1,262,462	1,188,309	738,085	44,057	3,281,022	1,132
Stanislaus	68,103	715	488,103	264,672	1,120,859	26,881	1,969,333	959
PEER GROUP I Total	\$3,816,284	\$395,317	\$12,377,564	\$10,201,531	\$10,696,647	\$2,078,443	\$39,565,786	28,106
GROUP II								
Chico	\$741,506	\$140,655	\$1,072,185	\$638,816	\$1,813,666	\$288,661	\$4,695,489	11,201
Fullerton	5,102,555	84,896	4,259,480	1,788,047	2,932,876	431,993	14,599,847	7,131
Northridge	1,121,067	118,990	1,499,969	2,389,454	3,138,787	672,072	8,940,339	6,903
Pomona	949,235	57,625	4,417,502	360,075	1,582,574	546,330	7,913,341	4,960
Sacramento	1,139,990	17,287	5,648,272	1,544,473	1,174,291	516,272	10,040,585	32,301
San Francisco	1,230,587	57,300	2,457,362	8,543,116	2,084,722	532,171	14,905,258	6,687
San José	4,463,284	40,399	2,141,255	2,119,896	2,809,411	110,614	11,684,859	7,034
Sonoma	4,266,975	2,400	1,734,068	1,455,193	262,326	954,345	8,675,307	2,252
PEER GROUP II Total	\$19,015,199	\$519,552	\$23,230,093	\$18,839,070	\$15,798,653	\$4,052,458	\$81,455,025	78,469
GROUP III								
Fresno	\$3,206,627	\$32,963	\$5,157,437	\$32,478,175	\$3,477,332	\$280,948	\$44,633,482	8,994
Long Beach	2,150,514	535,476	10,633,969	3,675,337	3,867,351	1,856,112	22,718,759	24,910
San Diego	11,465,274	598,615	15,308,902	13,845,954	6,063,086	2,746,395	50,028,226	61,287
San Luis Obispo	4,702,566	1,216,497	2,045,687	4,123,507	5,653,294	1,448,537	19,190,088	16,829
PEER GROUP III Total	\$21,524,981	\$2,383,551	\$33,145,995	\$54,122,973	\$19,061,063	\$6,331,992	\$136,570,555	112,020
Chancellor's Office	\$0	\$0	\$170,785	\$1,593,531	\$935,182	\$4,744	\$2,704,242	17
SYSTEMWIDE Total	\$44,356,464	\$3,298,420	\$68,924,437	\$84,757,105	\$46,491,544	\$12,467,637	\$260,295,608	218,612

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

Charitable Gifts Receipts by Purpose

2008/09 Fiscal Year

Chart V

	Current Programs		Campus Improvements: Property, Buildings and Equipment	Capital Purposes			Deferred Gifts	Gift Receipts Total
	Unrestricted	Restricted		Unrestricted	Restricted	Loan Funds		
GROUP I								
Bakersfield	\$40,817	\$2,833,634	\$1,091,166	\$0	\$349,941	\$0	\$0	\$4,315,558
Channel Islands	429,147	3,109,674	76,325	0	27,000	0	0	3,642,146
Dominguez Hills	31,286	2,941,675	10,004	0	342,194	0	10,000	3,335,159
East Bay	140,710	1,495,289	485	200	328,599	0	0	1,965,283
Humboldt	306,439	2,846,806	0	28,000	356,606	110	10,000	3,547,961
Los Angeles	973,601	2,299,407	762,103	0	1,202,963	0	21,553	5,259,627
Maritime Academy	321,247	780,233	0	26,000	292,540	0	0	1,420,020
Monterey Bay	37,338	2,287,113	273,082	0	2,644,207	0	0	5,241,740
San Bernardino	8,437	3,757,879	676,092	1,000	737,220	0	407,310	5,587,937
San Marcos	38,943	2,782,869	246,314	0	212,896	0	0	3,281,022
Stanislaus	8,754	1,754,651	10,800	0	195,128	0	0	1,969,333
PEER GROUP I Total	\$2,336,719	\$26,889,229	\$3,146,371	\$55,200	\$6,689,293	\$110	\$448,863	\$39,565,786
GROUP II								
Chico	\$362,320	\$1,429,397	\$0	\$16,691	\$2,826,931	\$150	\$60,000	\$4,695,489
Fullerton	221,679	9,596,365	1,996,128	0	2,629,675	0	156,000	14,599,847
Northridge	119,565	4,552,579	2,758,127	0	1,276,580	0	233,488	8,940,339
Pomona	255,989	3,313,864	3,695,565	40	637,883	0	10,000	7,913,341
Sacramento	141,087	6,714,966	1,945,686	0	1,238,846	0	0	10,040,585
San Francisco	283,819	7,349,661	858,458	0	6,413,320	0	0	14,905,258
San José	553,007	7,896,255	0	0	1,610,597	0	1,625,000	11,684,859
Sonoma	23,532	1,617,845	\$3,252,872	0	431,058	0	3,350,000	8,675,307
PEER GROUP II Total	\$1,960,998	\$42,470,932	\$14,506,836	\$16,731	\$17,064,890	\$150	\$5,434,488	\$81,455,025
GROUP III								
Fresno	\$257,451	\$40,940,187	\$2,143,397	\$0	\$1,292,447	\$0	\$0	\$44,633,482
Long Beach	1,027,713	10,307,385	674,316	0	4,346,845	0	6,362,500	22,718,759
San Diego	70,514	37,299,307	0	0	7,912,159	213,700	4,532,546	50,028,226
San Luis Obispo	723,493	12,639,286	4,148,250	0	1,585,681	275	93,104	19,190,088
PEER GROUP III Total	\$2,079,171	\$101,186,165	\$6,965,963	\$0	\$15,137,132	\$213,975	\$10,988,150	\$136,570,555
Chancellor's Office	\$110,656	\$2,558,586	\$0	\$0	\$35,000	\$0	\$0	\$2,704,242
SYSTEMWIDE Total	\$6,487,544	\$173,104,912	\$24,619,169	\$71,931	\$38,926,315	\$214,235	\$16,871,501	\$260,295,608

Charitable Gifts Comparison

Between Fiscal Years
2006/07 and 2008/09
Chart VI

Category	2006/07	2007/08	2008/09
<i>Source of Support</i>			
Individuals			
Alumni	\$37,949,891	\$48,045,152	\$44,356,464
Parents	\$4,693,243	\$3,809,345	\$3,298,420
Others	\$69,111,142	\$83,153,313	\$68,924,437
Individuals Total	\$111,754,276	\$135,007,809	\$116,579,321
Organizations			
Foundations	\$55,447,703	\$64,040,030	\$84,757,105
Corporations	\$52,968,334	\$51,301,704	\$46,491,544
Others	\$13,519,770	\$12,698,756	\$12,467,637
Organizations Total	\$121,935,807	\$128,040,490	\$143,716,286
Source of Support Total	\$233,690,082	\$263,048,299	\$260,295,608
<i>Gift Purposes</i>			
Current Operations			
Unrestricted	\$6,355,055	\$6,302,135	\$6,487,544
Restricted	\$136,596,633	\$135,574,080	\$173,104,912
Current Operations Total	\$142,951,688	\$141,876,215	\$179,592,456
Capital Purposes			
Property, Buildings and Equipment	\$28,363,596	\$32,449,316	\$24,619,169
Endowment: Unrestricted	\$2,049,452	\$1,124,442	\$71,931
Endowment: Restricted	\$49,385,054	\$66,829,996	\$38,926,315
Loan Funds	\$249,573	\$2,685	\$214,235
Capital Purposes Total	\$80,047,675	\$100,406,439	\$63,831,650
Deferred Gifts	\$10,690,722	\$20,765,610	\$16,871,501
Gift Purposes Total	\$233,690,082	\$263,048,299	\$260,295,608

Endowment

Three Year Market Value

Chart VII

	2006/07 Market Value	2007/08 Market Value	2008/09 Market Value	2007/08-2008/09 Comparison		2006/07 Investment Return Rate	2007/08 Investment Return Rate	2008/09 Investment Return Rate	Three Year Average	2008/09 Gifts to Endowment	2008/09 Endowment Distribution
				Amount	Percentage						
GROUP I											
Bakersfield	\$16,460,000	\$16,415,000	\$13,013,485	-\$3,401,515	-20.72%	16.53%	-3.01%	-15.41%	-0.63%	\$349,941	\$158,062
Channel Islands	7,722,000	7,253,000	6,241,639	-1,011,361	-13.94%	18.10%	-2.70%	-15.20%	0.07%	27,000	226,812
Dominguez Hills	6,730,000	6,567,000	6,033,290	-533,710	-8.13%	12.70%	-5.12%	-10.30%	-0.91%	342,194	226,549
East Bay	9,762,407	9,179,000	7,745,376	-1,433,624	-15.62%	14.70%	-6.06%	-14.38%	-1.91%	328,799	237,999
Humboldt	18,797,000	18,447,207	15,700,287	-2,746,920	-14.89%	15.46%	0.00%	-14.80%	0.22%	384,606	641,096
Los Angeles	18,898,708	15,091,286	13,223,651	-1,867,635	-12.38%	15.27%	-5.92%	-14.90%	-1.85%	1,202,963	567,387
Maritime Academy	1,837,049	1,845,354	1,882,472	37,118	2.01%	5.30%	-1.70%	-16.20%	-4.20%	318,540	0
Monterey Bay	4,801,223	7,014,521	7,676,318	661,797	9.43%	7.20%	-1.70%	-12.60%	-2.37%	2,644,207	234,013
San Bernardino	12,651,000	14,189,699	13,401,462	-788,237	-5.55%	11.43%	-5.78%	-18.30%	-4.22%	738,220	0
San Marcos	15,157,781	16,222,000	12,991,702	-3,230,298	-19.91%	12.40%	-7.46%	-20.11%	-5.06%	212,896	476,156
Stanislaus	11,000,000	11,084,000	8,422,419	-2,661,581	-24.01%	10.00%	-8.51%	-24.00%	-7.50%	195,128	479,734
PEER GROUP I Total	\$123,817,168	\$123,308,067	\$106,332,101	-\$16,975,966	-13.77%	13.79%	-4.54%	-16.31%	-2.35%	\$6,744,493	\$3,247,808
GROUP II											
Chico	\$35,741,000	\$34,656,000	\$28,634,866	-\$6,021,134	-17.37%	15.10%	-2.30%	-16.90%	-1.37%	\$2,843,622	\$1,606,829
Fullerton	17,592,146	20,021,744	18,960,389	-1,061,355	-5.30%	15.92%	-2.99%	-15.77%	-0.95%	2,629,675	284,483
Northridge	60,227,000	55,379,000	48,920,302	-6,458,698	-11.66%	15.69%	-5.40%	-19.70%	-3.14%	1,276,580	2,153,820
Pomona	33,716,459	33,201,000	27,636,000	-5,565,000	-16.76%	15.55%	-3.21%	-16.80%	-1.49%	637,923	956,000
Sacramento	20,068,853	22,287,688	19,711,554	-2,576,134	-11.56%	10.80%	-1.56%	-12.70%	-1.15%	1,238,846	745,170
San Francisco	41,202,000	47,179,000	43,731,310	-3,447,690	-7.31%	12.74%	-1.86%	-12.15%	-0.42%	6,413,320	658,346
San José	50,020,113	50,108,000	40,517,427	-9,590,573	-19.14%	17.50%	-11.80%	-22.40%	-5.57%	1,610,597	749,827
Sonoma	37,417,460	35,601,552	26,036,684	-9,564,868	-26.87%	18.52%	-3.94%	-22.70%	-2.71%	431,058	1,144,258
PEER GROUP II Total	\$295,985,031	\$298,433,984	\$254,148,532	-\$44,285,452	-14.84%	15.54%	-4.69%	-17.67%	-2.27%	\$17,081,621	\$8,298,733
GROUP III											
Fresno	\$112,847,758	\$104,746,000	\$91,339,899	-\$13,406,101	-12.80%	14.03%	-6.13%	-13.81%	-1.97%	\$1,292,447	\$3,878,055
Long Beach	36,072,454	36,616,000	31,070,238	-5,545,762	-15.15%	16.04%	-4.36%	-19.90%	-2.74%	4,346,845	1,549,019
San Diego	113,853,000	115,090,000	95,449,000	-19,641,000	-17.07%	16.80%	-5.40%	-18.00%	-2.20%	7,912,159	3,356,000
San Luis Obispo	181,723,000	166,179,000	130,946,796	-35,232,204	-21.20%	16.50%	-6.20%	-18.50%	-2.73%	1,585,681	5,913,052
PEER GROUP III Total	\$444,496,212	\$422,631,000	\$348,805,933	-\$73,825,067	-17.47%	15.91%	-5.81%	-17.26%	-2.39%	\$15,137,132	\$14,696,126
Chancellor's Office	\$9,744,000	\$9,210,000	\$7,880,445	-\$1,329,555	-14.44%	15.22%	-2.40%	-12.00%	0.27%	\$35,000	\$252,430
SYSTEMWIDE Total	\$874,042,411	\$853,583,051	\$717,167,011	-\$136,416,040	-15.98%	15.48%	-5.20%	-17.21%	-2.31%	\$38,998,246	\$26,495,097

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

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

Alumni Data

2007/08 Fiscal Year

Chart VIII

	Number of Addressable Alumni	Alumni Association Members			Membership Dues Collected	Alumni Solicited	Alumni Donors	Total Alumni Contributions	Percentage of Alumni Contributions from Members	Total Contributions from Alumni Association Members
		Annual	Lifetime	Total Number Members						
GROUP I										
Bakersfield	30,799	380	193	573	\$8,460	14,153	552	\$117,399	61.39%	\$72,072
Channel Islands	3,117	921	38	959	12,090	3,114	498	18,192	92.26%	16,784
Dominguez Hills	56,470	0	596	596	0	50,000	754	102,645	10.64%	10,920
East Bay	88,743	2,006	1,644	3,650	21,383	82,501	1,334	386,807	16.57%	64,084
Humboldt	43,920	982	2,764	3,746	34,195	30,468	3,880	640,583	21.37%	136,904
Los Angeles	111,842	8,384	1,538	9,922	87,103	38,863	3,140	1,915,506	5.99%	114,802
Maritime Academy	3,767	0	3,767	3,767	0	3,726	372	330,355	100.00%	330,355
Monterey Bay	5,266	202	1,057	1,259	40,870	5,108	91	8,060	94.95%	7,653
San Bernardino	58,699	2,401	701	3,102	49,165	29,294	1,277	192,422	49.17%	94,618
San Marcos	22,646	952	96	1,048	19,680	13,839	125	36,212	17.47%	6,325
Stanislaus	41,826	0	33,512	33,512	0	41,826	316	68,103	86.77%	59,093
PEER GROUP I Total	467,095	16,228	45,906	62,134	\$272,946	312,892	12,339	\$3,816,284	23.94%	\$913,610
GROUP II										
Chico	128,904	1,873	653	2,526	\$95,202	95,862	5,473	\$741,506	31.04%	\$230,189
Fullerton	178,748	3,865	2,263	6,128	108,034	139,855	4,607	5,102,555	89.83%	4,583,667
Northridge	197,974	6,651	1,119	7,770	81,756	176,277	3,507	1,121,067	27.11%	303,871
Pomona	102,395	1,047	2,059	3,106	62,560	34,561	3,638	949,235	53.26%	505,599
Sacramento	173,040	2,239	2,335	4,574	83,315	47,440	3,659	1,139,990	13.52%	154,099
San Francisco	238,572	0	3,747	3,747	65,032	41,725	3,841	1,230,587	7.09%	87,272
San José	188,120	5,795	4,721	10,516	217,115	188,120	3,280	4,463,284	38.75%	1,729,643
Sonoma	51,705	1,251	1,142	2,393	16,993	18,407	455	4,266,975	39.98%	1,706,053
PEER GROUP II Total	1,259,458	22,721	18,039	40,760	\$730,007	742,247	28,460	\$19,015,199	48.91%	\$9,300,393
GROUP III										
Fresno	169,580	2,962	2,124	5,086	\$148,905	95,447	4,519	\$3,206,627	24.49%	\$785,228
Long Beach	223,754	33,309	796	34,105	72,303	123,617	9,736	2,150,514	42.26%	908,777
San Diego	243,387	2,718	5,007	7,725	305,000	118,378	5,838	11,465,274	16.95%	1,943,840
San Luis Obispo	139,086	3,325	9,994	13,319	192,110	37,077	8,567	4,702,566	28.69%	1,349,320
PEER GROUP III Total	775,807	42,314	17,921	60,235	\$718,318	374,519	28,660	\$21,524,981	23.17%	\$4,987,165
SYSTEMWIDE Total	2,502,360	81,263	81,866	163,129	\$1,721,271	1,429,658	69,459	\$44,356,464	34.27%	\$15,201,167

Note 1: Alumni Association members may include friends of the university that officially are not alumni; therefore, it is possible for contributions from Alumni gifts from Alumni Association members to exceed gifts from alumni.

Note 2: In 2006/07, Maritime Academy discontinued dues membership; all alumni are now given free lifetime membership to the Alumni Association.

Note 3: In 2006/07, Stanislaus discontinued dues membership; a new program now includes all alumni in the Donor Association.



401 Golden Shore, Long Beach, CA 90802-4210