

AGENDA

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Meeting: 1:15 p.m., Tuesday, January 25, 2011
Glenn S. Dumke Auditorium

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

Consent Item

Approval of Meeting Minutes of November 9, 2010

Discussion Items

1. Naming of an Academic Entity at California State University, Channel Islands, *Action*
2. Approval of the 2009-2010 Annual Report on Philanthropic Support to the California State University, *Action*

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

November 9, 2010

Members Present

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

Approval of Minutes

The minutes of September 21, 2010, were approved by consent as submitted.

Naming of an Academic Entity – San José State University

Vice Chancellor for University Relations and Advancement Garrett P. Ashley presented the report on the request to name the nursing program at San José State University, as The Valley Foundation School of Nursing.

Mr. Ashley related that the proposed naming recognizes The Valley Foundation, an organization that supports efforts to improve health care and medical services for low-income households in Santa Clara County. He stated that the foundation's current \$5 million dollar contribution, combined with previous giving of \$3.5 million, comprised a total donation of \$8.5 million to San José State University. He noted that the donation would significantly elevate the nursing school and help increase the number of students in a profession that is vital to California's economy.

President Don Kassing thanked the Valley Foundation for its gift, the largest in the foundation's history. He noted that the foundation's chairman, Phillip Boyce, is a graduate of San José State University, and has a long history of supporting his alma mater. Mr. Kassing commented that

the foundation's investment reflects not only its commitment to the university, but also to the people in the community who need quality health care. He added that this gift will allow the university's nursing students to train in a state-of-the art clinical simulation center using sophisticated, new technologies. When the students graduate, they will be ready to help meet the increasing demands of the health care system.

The committee recommended approval of the proposed resolution (RIA 11-10-06).

The 2010 California State University and AT&T Road to College Tour Video

Vice Chancellor Ashley began the informational report by thanking AT&T and its president Ken McNeely, who also serves on the CSU Board of Governors, for the \$500,000 grant to the CSU Chancellor's Office Foundation, which made the tour possible. He also acknowledged the Communications Department for its enthusiasm and efforts toward making the second annual tour a statewide success. He noted that the tour was expanded from two weeks to five weeks this year to reach a greater number of students at schools in the CSU's 23-campus service areas.

Assistant Vice Chancellor for Communications Marge Grey provided additional information on the Road to College campaign and reported that the tour helped the CSU to achieve one of its most important initiatives, which is to serve underrepresented students.

Ms. Grey presented the Road to College Tour video and announced that the tour has just won a gold award from the Association of Marketing and Communication Professionals in its 2010 international competition.

Trustee Fong adjourned the committee.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Naming of an Academic Entity at California State University, Channel Islands

Presentation By

Garrett P. Ashley
Vice Chancellor
University Relations and Advancement

Summary

This item will consider naming the Community and Labor Studies Institute at California State University, Channel Islands as The Henry L. “Hank” Lacayo Institute for Workforce and Community Studies.

This proposal, submitted by CSU Channel Islands, 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 campus academic senate.

Background

The proposed naming of the facility acknowledges \$562,000 in contributions from Southern California Edison, Verizon, AT&T, Southern California Gas Company and community members to the institute in recognition of Mr. Lacayo.

The gift will establish The Henry L. “Hank” Lacayo Institute for Workforce and Community Studies (HLI). The HLI will enhance opportunities for students engaged in entrepreneurial studies and will address the importance of workforce and community issues relating to the sustainability of statewide and national economies, the vitality of communities, and the connection between opportunity and quality of life in society. Specifically, the HLI incorporates four interacting components, including applied policy research, community outreach, policy education, and leadership development.

Mr. Lacayo is a recognized national labor leader with over 50 years of distinguished service, retiring as the National Director of the United Auto Workers (UAW) political and legislative department. He has served as an advisor to four United States presidents, as well as governors, and is held in high esteem throughout the state and the nation. He has worked as a tireless supporter of workers’ rights, including his early role to convince the UAW to provide support to Cesar Chavez. He currently is serving a second term as state president of the Congress of California Seniors and serves as advisor to the National Association for the Hispanic Elderly. He

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is a coordinator for the Southern California UAW Retiree Council, is on the boards of numerous other regional groups, and serves as a senior advisor to the president of CSU Channel Islands. He is a founder and national president emeritus for the Labor Council for Latin American Advancement and founder and past chairman of the U.S. Hispanic Leadership Institute. He has received numerous humanitarian awards in recognition of his commitment and service to the underserved in our communities. In addition to his instrumental role in securing financial support of the HLI, Mr. Lacayo is a founding member of the CSU Channel Islands President's Circle and has contributed generously to this fundraising arm of the university.

The following resolution is recommended for approval:

RESOLVED, by the Board of Trustees of the California State University, that the Community and Workforce Studies Institute at CSU Channel Islands be named The Henry L. "Hank" Lacayo Institute for Workforce and Community Studies.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Approval of the 2009-2010 Annual Report on Philanthropic Support to the California State University

Presentation By

Garrett P. Ashley
Vice Chancellor
University Relations and Advancement

Lori A. Redfearn
Assistant Vice Chancellor
Advancement Services

Summary

This item presents information on philanthropic support received by the 23-campus California State University (CSU) system from July 1, 2009 to June 30, 2010. 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/0910philanthropicsupport.

Overview

Over the past three years, the California State University has averaged \$357 million in gift commitments, including over \$265 million designated in 2009-2010. Despite a sluggish economic recovery, the number of individual donors to the university began to rebound reaching 220,830 compared to 218,612 in 2008-2009.

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 nearly \$228 million—a 12.5 percent decrease from 2008-2009. This decrease brings the CSU fundraising results into alignment with the 11.9 percent decline experienced by universities across the nation

in 2008-2009. Last year, CSU gift receipts remained relatively steady due to an extraordinarily large gift of \$29 million to CSU Fresno.

Within gift receipts, donors invested nearly \$141 million to enhance the margin of excellence in current university objectives:

- \$15.6 million for student scholarships
- \$43.9 million for academic programs
- \$9.9 million for applied research
- \$1.0 million for faculty compensation
- \$1.6 million for library operations
- \$14.5 million for athletics
- \$25.5 million for public service programs
- \$1.8 million for physical plant operations
- \$26.8 million for other university needs

To support the future capacity of the university, more than \$19 million was contributed to build state-of-the-art libraries, technologically advanced laboratories, contemporary performing arts centers, and expanded athletic facilities. Additionally, donors added \$50 million to university endowments, creating a lasting legacy of support. Irrevocable deferred gifts accounted for just about \$12 million in future support.

Of all charitable gifts received, 97 percent were designated to specific interests identified by the donor. Only \$5.9 million received was unrestricted and available to be directed to the university's most pressing needs.

The following resolution is recommended for approval:

RESOLVED, by the Board of Trustees of the California State University, that the Board adopts the *2009-2010 Annual Report of Philanthropic 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.

2009/2010
PHILANTHROPIC
ANNUAL REPORT

www.calstate.edu



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Campus-specific philanthropic support information for 2009-2010 is available online at www.calstate.edu/ua/0910philanthropicsupport.

2010/11 William R. Hearst/CSU Trustees' Award for Outstanding Achievement honorees attending the awards ceremony at the September 2010 CSU Board of Trustees meeting:



First row, left to right:

Katherrine Healey, CSU Sacramento; Sherry G. Hill, CSU Stanislaus; Gerard Johnson, San José State University; Brandi Lakey, California Maritime Academy; Karen Martinez, CSU Monterey Bay; Phuong Nguyen, CSU Dominguez Hills; Patricia do Carmo, Cal Poly Pomona; Adrienne D. Wilson, San Francisco State University; and Brandy Janelle Harris, Sonoma State University

Second row, left to right:

Justin W. Hanson, San Diego State University; Samantha Barton, CSU Northridge; Tyree A. Boyd-Pates, CSU Bakersfield; Qais Ahmadi, CSU East Bay; Raymond Austin Nation, CSU Fullerton; William T. Daly, CSU Fresno; and Robert David Black, CSU Los Angeles

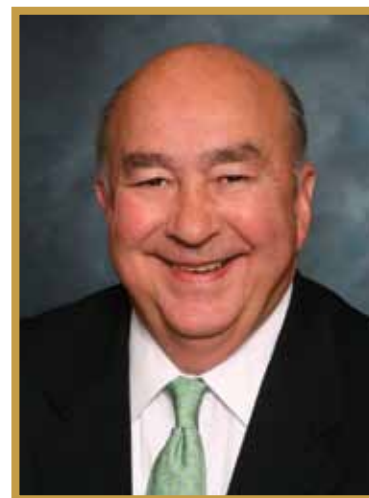
Top row, left to right:

Brian K. Smith, CSU Long Beach; Jillian L. Ruddell, CSU Chico; Pablo Ramos, Cal Poly San Luis Obispo; Leticia Aguayo, CSU Channel Islands; Rachel England, CSU San Marcos; and Elise Haas, Humboldt State University

Not Pictured: Sean Phillips, CSU San Bernardino

MESSAGE FROM THE CHANCELLOR

The California State University's mission is built on providing access to students. Yet providing access has become one of the CSU's greatest challenges with the state budget. The state of California is steeped in a financial crisis at the same time there is an incredible demand for higher education. Like most public universities throughout the country, the California State University is challenged with determining how to serve more students with fewer resources.



While some of our funding has been restored for 2011, we are still in a precarious position as the state budget shortfall is predicted to increase in the coming years. But our focus on serving students has been—and must continue to be—unwavering. Our approach is to manage our resources with the most efficiency so that we can continue to deliver affordable, high-quality education.

To meet students' needs, we are offering more classes on evenings and weekends. This helps us accommodate students who have full- or part-time work responsibilities, and makes better use of our facilities. Additionally, we have begun to offer more courses online.

We have also implemented a Graduation Initiative and an Early Start program. Both of these efforts will help students be better prepared to take on the academic rigor of our universities long before they reach our universities, which will help them graduate on time.

This year, we sponsored landmark legislation that will streamline the community college transfer process for students who want to come to the CSU. The Community College Transfer Bill establishes a transfer Associate of Arts degree that will ensure that students enter the CSU with the appropriate courses and credit hours, saving them time and money.

The CSU is continuing to find new ways to reach out to California's rapidly growing population of students from traditionally underserved communities. We now have comprehensive programs in African American churches, Latino neighborhoods, Asian community centers, Native American reservations, and on military bases.

Our partnerships with industry have grown stronger as employers help us understand how to better prepare our students for a highly competitive workforce.

Behind many of these efforts are the donors and supporters who are crucial to our success, and to our student's success. Your steadfast commitment has proven invaluable in helping us provide outstanding programs and services at a time when resources are scarce. Your investment makes our universities stronger and our students better equipped to succeed in a complex and ever-changing world.

Universities may suffer from funding shortfalls, but that does not mean we are powerless to effect change. With your continued partnership, we will help ensure that all students are given the opportunity to learn.

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 PHILANTHROPIC SUPPORT

Over the past three years, the California State University has averaged \$357 million in gift commitments, including over \$265 million designated in 2009-2010. Despite continued donor investment, giving to the CSU during 2009-2010 reflects the impact of the 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 almost \$228 million—a 12.5 percent decrease from 2008-2009. 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 almost \$141 million to enhance the margin of excellence in current university objectives:

- \$15.6 million for student scholarships
- \$43.9 million for academic programs
- \$9.9 million for applied research
- \$1.0 million for faculty compensation
- \$1.6 million for library operations
- \$14.5 million for athletics
- \$25.5 million for public service programs
- \$1.8 million for physical plant operations
- \$26.8 million for other university needs

To support the future capacity of the university, more than \$19 million was contributed to build state-of-the-art libraries, technologically advanced laboratories, contemporary performing arts centers, and expanded athletic facilities. Additionally, donors added \$50 million to university endowments, creating a lasting legacy of support. Fifty-three irrevocable deferred gifts accounted for \$12 million in future support.

Of all charitable gifts received, 97 percent were designated to specific interests identified by the donor. Only \$5.9 million received was unrestricted and available to be directed to the university's most pressing needs.



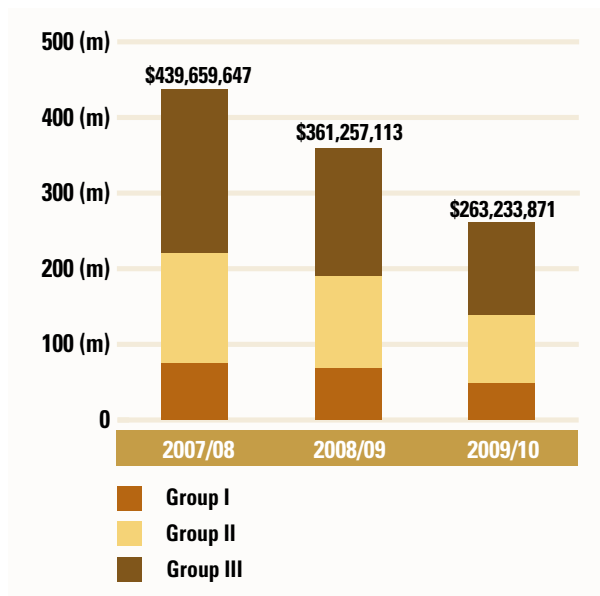
San Diego State University Library Benefits from \$4 Million Pledge

Charles and Robin Luby are a San Diego couple who have been active volunteers over the past several decades, serving on the SDSU Alumni Association Board of Directors and supporting a number of campus committees. Mr. Luby, now retired from his career with General Atomics, received his bachelor's ('59) and master's ('64) degrees in chemistry from SDSU, and Mrs. Luby, a retired schoolteacher, also received her bachelor's ('61) degree in English from SDSU. At the Monty Awards event, which honors outstanding SDSU alumni for their contributions to the university, the region and the nation, the couple announced their \$4 million commitment in support of the SDSU library. "We're very much committed to making the university continue to be the best it can, and if there's a way that we can help in what the goals are for the university, we're going to do that," Mrs. Luby said. The library is the most visited building on the SDSU campus, with outstanding book, journal and special collections. Library computers, printers, wireless connections, study rooms and media are in constant use. Around-the-clock hours and website access support a new generation of students.

Benchmarking Performance

The factors for determining peer groups, which are outlined on Appendix Chart II, include the number of full-time professional fundraisers, the number of individual donors, and the endowment market value. These factors have been determined as the leading indicators for fundraising success.

Three-Year History of Gift Commitments by Group



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

	2007/08	2008/09	2009/10
Gift Commitments*	\$441,740,420	\$363,926,355	\$265,200,484
State General Fund	\$2,803,801,463	\$2,795,240,005	\$2,166,062,017
Total Gift Commitments as a % of State General Fund Allocation	16%	13%	12%
Group I Average	10%	9%	8%
Group II Average	12%	10%	10%
Group III Average	30%	23%	23%

*Includes gift commitments to Chancellor's Office

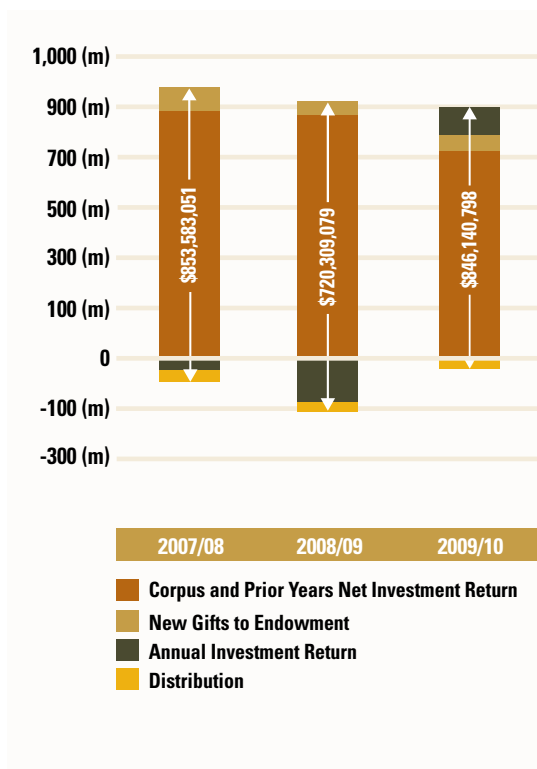
Endowment

CSU endowments began to recover during 2009-2010, with an 18 percent increase in endowment market value that reached \$846 million, up from \$720 million in 2008-2009.

In 2009-2010, donors contributed nearly \$50 million in new gifts toward endowments, an increase of 26 percent from the prior year. Over a three-year period, \$157 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 \$23 million from endowment in support of the university's students, faculty and programs.

During the year, investment strategies at CSU institutions paid off, with the CSU experiencing a positive investment return, which averaged 13.34 percent. Systemwide investment return is presented as a dollar-weighted average.

Endowment Market Value



Endowment Investment Performance

Investment Pool Asset Range	# CSU	CSU Average Investment Return
> \$100 M to ≤ \$500 M	3	14.59%
> \$50 M to ≤ \$100 M	2	13.75%
> \$25 M to < \$50 M	6	11.18%
< \$25 M	13	13.22%

2009/2010 CSU Median = 14.2%

2009/2010 Industry Benchmark: Russell 3000 65% and Barclay's Aggregate Bond Index 35% = 13.39%

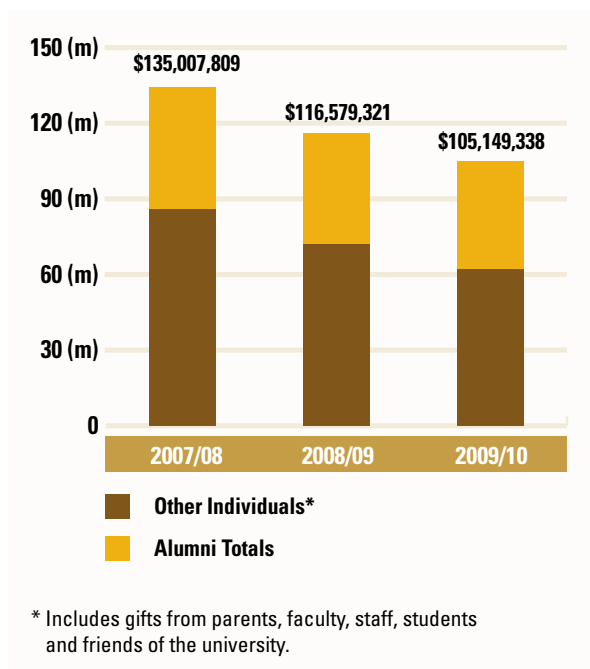
Individuals

Gifts from individuals include giving from alumni, parents, faculty, staff, students and friends of the university. In 2009-2010, gift receipts from individuals decreased \$11.4 million (or 10 percent) to \$105 million. Seventeen percent, or \$17.8 million, were from nine individuals' gifts of more than \$1 million at seven campuses (Fresno, Fullerton, Northridge, San Diego, San Luis Obispo, San Marcos and San José).

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 220,830 individual donors this year compared to 218,612 in 2008-2009 and 221,410 in 2007-2008.

In 2009-2010, Alumni donors made up 32 percent of individual donors and contributed over \$43 million (or 41 percent of giving from individuals). Alumni additionally supported the university with \$1.5 million in membership dues.

Individual Giving to the CSU



Ed and Bertha Fitzpatrick Arena

Ed Fitzpatrick and his wife, Bertha, have a longstanding relationship with CSU Stanislaus—Mr. Fitzpatrick has served as a strong and valuable member of the University's Foundation Board since 2003 and both actively support the Warrior Athletics program. Ed is a successful and inspirational business leader, becoming the first African American to receive the Lexus franchise and has received recognition as a leader in his industry. This year, Ed and Bertha announced a \$500,000 gift in support of Warrior Athletics and were honored by the renaming of Warrior Arena, which serves as the hub of campus activity for school spirit and sportsmanship, to the Ed and Bertha Fitzpatrick Arena. "Bertha and I are proud to support our local university in producing well-rounded graduates," Ed said. "Academics and athletics must work hand in hand to help students develop both the mind and the body. Over the past few years, we have seen CSU Stanislaus advance academically and athletically under [President] Ham's leadership. The Cal State Stanislaus Warriors have great years ahead of them, and we will be cheering from the sidelines." The gift 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.

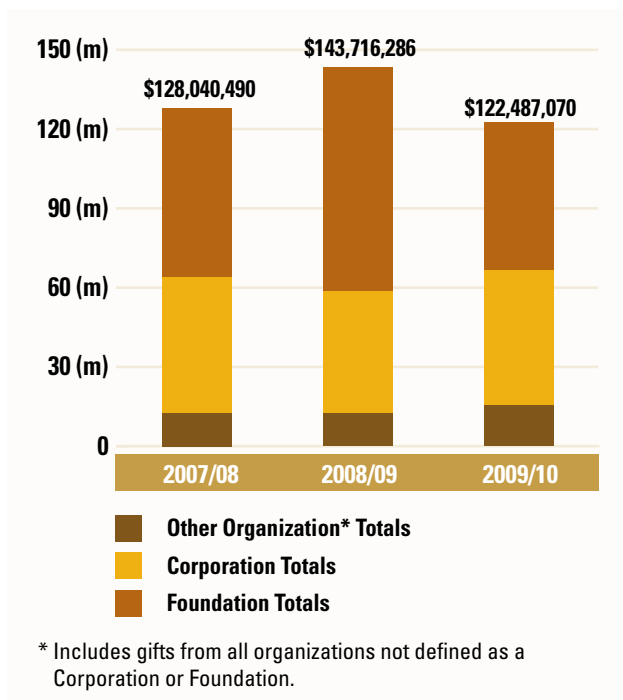
Organizations

Gifts from organizations include giving from corporations, foundations and other organizations such as the United Way. In 2009-2010, gift receipts from organizations decreased more than \$21 million (or 15 percent) to \$122.5 million.

Corporations donated \$51.5 million (an 11 percent increase from the prior year), including four gifts of \$1 million or more, one each received by East Bay, Long Beach, Northridge and San Francisco. Of the total received from corporations, company products accounted for \$2 million. Corporations also support educational priorities by matching contributions from their employees. As in 2008-2009, over 3,000 matching gifts enhanced the value of individual contributions by almost \$1.5 million this year.

Although foundation contributions decreased 34 percent from 2008-2009, this \$29 million decrease is equivalent to one \$29 million cash gift—the largest single cash gift ever received by Fresno—last year. The aggregate value of foundation contributions gifts equaled one-quarter of all charitable gift receipts in 2009-2010. With 1,020 contributions, private foundations, including family foundations, contributed \$55.7 million. Ten gifts of \$1 million or more were received by seven universities, including Chico, Dominguez Hills, Fresno, Humboldt, Los Angeles, San Diego and San José.

Organization Giving to the CSU



Students 'Get on Board' with the CSU/ AT&T Road to College Bus Tour

The California State University and AT&T for the second year in a row took to the road with the message of academic preparation, access for underserved students and the need for future workforce professionals in California. Thousands of middle and high school students at 40 stops statewide boarded a 40-foot high-impact "wired" bus wrapped with the "Road to College: Get on Board" theme, and complete with laptop computers with career exploration, academic preparation and financial aid planning information. The 2010 tour was made possible by \$500,000 in funding provided by AT&T. "Education is the key focus of AT&T's philanthropy and the Road to College is a great way to get young people thinking ahead and excited about higher education," said Ken McNeely, president, AT&T California. "We are driven to make California more competitive in the workplace, along with the better lives and improved communities that come from students graduating from colleges and universities."

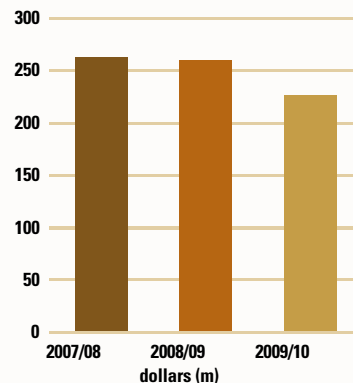
SYSTEM HIGHLIGHTS

- Doctoral candidates in education leadership are evaluating the educational benefits of after-school programs through a \$185,000 grant by the David and Lucile Packard Foundation. The research will advance and strengthen learning experiences for children who have a range of needs, including English learners and special needs students. The foundation also funded a companion child development project to study early childhood teacher certification in other states and identify potential lessons for teacher credentialing in California.
- Over 400 faculty and 3,000 students in the science, technology, engineering and math fields will benefit from a \$1.5 million Learn and Serve America grant. The STEM2 Initiative integrates meaningful community services with enriched learning experiences, which teach civic responsibility and strengthen communities. Demonstration projects at Chico, Fresno, Monterey Bay, San Marcos and Sonoma aim to develop replicable models and enhance the pipeline of students entering careers in these high-demand fields.
- Helping to make information technology accessible to everyone, the California Emerging Technology Fund invested \$118,750 into the CSU Accessible Technology Center. The Center develops protocols and tests information technology products for disability-related usability. Evaluation results help vendors improve their products and assist other state agencies in making their purchasing decisions.

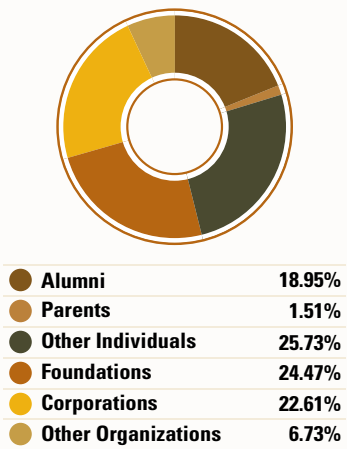
Gift Commitments 2009/10	
New Gifts	\$174,302,747
New Pledges	\$34,558,024
Testamentary Commitments	\$55,555,435
Native American and Local Government Contributions	\$784,277
Total	\$265,200,484

CHARITABLE GIFT RECEIPTS	
New Gifts	\$174,302,747
Pledge Payments	\$53,333,661
2009/10 Total	\$227,636,408

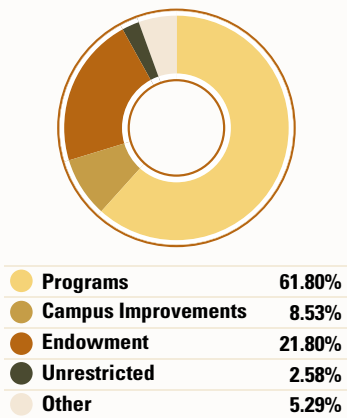
CHARITABLE GIFTS: A 3-YEAR HISTORY



CHARITABLE GIFTS BY SOURCE OF GIFT



CHARITABLE GIFTS BY GIFT DISBURSEMENT



BOARD OF TRUSTEES RECOGNITIONS

The CSU Board of Trustees recognized leadership gifts to the university by naming the following academic programs or facilities in 2009-2010.

- The Museum of Anthropology at California State University, Chico was named the Valene L. Smith Anthropology Museum in honor of Dr. Valene Smith for her \$3.3 million commitment to the museum to fund operational, program and capital expenditures. Her long tenure as a professor of anthropology at CSU Chico has inspired countless students and pioneered a new facet of anthropology in the area of anthropology of tourism.
- An \$875,000 gift was received from the estate of retired California State University, Fresno professor Dr. Maxima A. Dandoy to establish the Maxima A. Dandoy Center for Academic Excellence (Dandoy Center) at CSU Fresno. Dr. Dandoy served as a professor at CSU Fresno from 1956 until her retirement in 1987. Her gift will make a significant impact at the Kremen School of Education and Human Development at the campus by ensuring a strong commitment to excellence within curriculum and instruction.
- The newly constructed residence hall at California Maritime Academy was named McAllister Hall, recognizing a more than \$1 million contribution by Captain Robert W. McAllister. When asked about his ongoing financial support of Cal Maritime, Class of '42 alumnus Captain McAllister responded, "I was very fortunate in many ways. I made good money in a field I loved. It just seemed natural to give back to the school that did so much to help me start my long career as a captain and pilot."
- Recognizing an \$800,000 contribution by the Murillo family, California State University, San Bernardino named the new astronomical observatory the Murillo Family Observatory. This funding is in support of a \$2.9 million observatory that will be a state-of-the-art teaching center to serve K-16 students, faculty, researchers and the community at-large. The twin tower facility will provide access for both day and night viewing and will create much-needed opportunities for science education and hands-on learning experiences.
- California Polytechnic State University, San Luis Obispo named Building "D" in the Construction Innovations Center within the College of Architecture and Environmental Design (CAED) as the Simpson Strong-Tie Materials Demonstration Laboratory in recognition of Simpson Strong-Tie Company, Inc.'s generous founding gift. This gift was highly instrumental in securing the total private support for this building.
- The L. Robert Payne School of Hospitality and Tourism Management was named in recognition of a \$2.4 million new pledge from L. Robert Payne, committed and active partner with San Diego State University, in addition to his \$1.1 million seed funding that created the Hospitality and Tourism Management Program over eight years ago. The funds will help the School of Hospitality and Tourism Management in perpetuity attract and retain faculty, facilitate student enrichment, secure the director's position, and supplement research.
- Warrior Arena at California State University, Stanislaus was renamed the Ed and Bertha Fitzpatrick Arena to recognize the \$500,000 commitment by Mr. Ed Fitzpatrick, a successful and inspirational business leader who became the first African American to receive a Lexus franchise. 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.



Captain McAllister ('42)

DATA COLLECTION PROCESS



The Annual Report on Philanthropic 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 Philanthropic Support report will vary from the audited financial statements.

DEFINITION OF TERMS

Charitable Gift Commitments

The data represents current year performance in developing philanthropic support for the institution. In addition to recognizing new gifts generated to support the institution, this measure acknowledges the important work achieved in securing on-going commitments through 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.

Group I

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

Group II

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

Group III

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

Pledges

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

Purpose of Gift

Refers to 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 alumni or parent.

- **FOUNDATIONS**

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

- **CORPORATIONS**

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 nongovernmental 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

2009/2010 Fiscal Year

Chart I

	2007/2008 Total Gift Commitments	2008/2009 Total Gift Commitments	2009/2010 Total Gift Commitments	Three Year Average	2007/2008 Total Gift Receipts	2008/2009 Total Gift Receipts	2009/2010 Total Gift Receipts	Three Year Average
GROUP I								
Bakersfield	\$4,177,919	\$4,479,320	\$4,768,964	\$4,475,401	\$3,874,067	\$4,315,558	\$3,989,984	\$4,059,870
Channel Islands	\$2,959,151	\$1,950,179	\$2,920,661	\$2,609,997	\$3,021,648	\$3,642,146	\$1,645,105	\$2,769,633
Dominguez Hills	\$2,197,411	\$3,627,027	\$2,655,893	\$2,826,777	\$1,907,345	\$3,335,159	\$2,730,897	\$2,657,800
East Bay	\$1,528,821	\$2,805,209	\$5,091,539	\$3,141,856	\$1,584,674	\$1,965,283	\$3,792,620	\$2,447,526
Humboldt	\$2,958,003	\$4,835,579	\$7,245,821	\$5,013,134	\$3,575,941	\$3,547,961	\$5,921,402	\$4,348,435
Los Angeles	\$8,760,536	\$26,142,519	\$10,525,846	\$15,142,967	\$6,857,542	\$5,259,627	\$5,517,797	\$5,878,322
Maritime Academy	\$1,114,932	\$3,995,020	\$1,093,858	\$2,067,937	\$1,138,932	\$1,420,020	\$1,722,858	\$1,427,270
Monterey Bay	\$5,110,816	\$5,557,903	\$3,565,397	\$4,744,705	\$4,598,702	\$5,241,740	\$3,692,736	\$4,511,059
San Bernardino	\$41,347,421	\$8,780,755	\$5,043,977	\$18,390,718	\$8,192,199	\$5,587,937	\$4,499,859	\$6,093,332
San Marcos	\$2,972,637	\$3,877,713	\$3,093,646	\$3,314,665	\$4,758,078	\$3,281,022	\$3,987,777	\$4,008,959
Stanislaus	\$2,721,445	\$2,434,411	\$2,675,268	\$2,610,375	\$1,896,905	\$1,969,333	\$2,241,782	\$2,036,007
PEER GROUP I TOTAL	\$75,849,092	\$68,485,635	\$48,680,870	\$64,338,532	\$41,406,033	\$39,565,786	\$39,742,817	\$40,238,212
GROUP II								
Chico	\$10,283,975	\$7,775,239	\$7,114,192	\$8,391,135	\$6,807,545	\$4,695,489	\$6,423,622	\$5,975,552
Fullerton	\$34,768,184	\$14,054,018	\$10,629,964	\$19,817,389	\$11,307,959	\$14,599,847	\$11,654,888	\$12,520,898
Northridge	\$20,053,527	\$13,172,900	\$13,384,946	\$15,537,124	\$14,136,987	\$8,940,339	\$12,529,565	\$11,868,964
Pomona	\$5,176,884	\$26,971,180	\$9,168,427	\$13,772,164	\$5,537,063	\$7,913,341	\$5,909,203	\$6,453,202
Sacramento	\$17,987,769	\$17,084,461	\$9,869,219	\$14,980,483	\$10,243,150	\$10,040,585	\$10,626,083	\$10,303,273
San Francisco	\$17,537,247	\$18,078,002	\$16,179,665	\$17,264,971	\$11,525,731	\$14,905,258	\$12,976,643	\$13,135,877
San José	\$25,731,484	\$17,841,940	\$20,404,957	\$21,326,127	\$20,128,175	\$11,684,859	\$17,445,119	\$16,419,384
Sonoma	\$13,607,281	\$7,621,206	\$3,513,931	\$8,247,473	\$12,900,675	\$8,675,307	\$3,268,524	\$8,281,502
PEER GROUP II TOTAL	\$145,146,351	\$122,598,946	\$90,265,301	\$119,336,866	\$92,587,285	\$81,455,025	\$80,833,647	\$84,958,652
GROUP III								
Fresno	\$23,844,296	\$50,714,107	\$15,350,698	\$29,969,700	\$16,757,909	\$44,633,482	\$19,211,324	\$26,867,572
Long Beach	\$33,939,844	\$31,992,835	\$28,945,371	\$31,626,017	\$26,486,900	\$22,718,759	\$12,874,199	\$20,693,286
San Diego	\$66,087,198	\$62,224,217	\$60,871,388	\$63,060,934	\$65,147,988	\$50,028,226	\$54,740,126	\$56,638,780
San Luis Obispo	\$94,792,866	\$25,241,373	\$19,120,243	\$46,384,827	\$18,507,411	\$19,190,088	\$18,247,682	\$18,648,394
PEER GROUP III TOTAL	\$218,664,204	\$170,172,532	\$124,287,700	\$171,041,479	\$126,900,208	\$136,570,555	\$105,073,331	\$122,848,031
Chancellor's Office	\$2,080,773	\$2,669,242	\$1,966,613	\$2,238,876	\$2,154,773	\$2,704,242	\$1,986,613	\$2,281,876
SYSTEMWIDE TOTAL	\$441,740,420	\$363,926,355	\$265,200,484	\$356,955,753	\$263,048,299	\$260,295,608	\$227,636,408	\$250,326,772

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.
 Note 2: 2008/2009 Fresno gift commitments were revised after the 2008/2009 report went to print; revision reflects a \$2,464,000 reduction to Native American and local government contributions.

CHARITABLE GIFT COMMITMENTS						2009/2010 Fiscal Year	Chart II	
	New Charitable Gifts	Native American & Local Government Contributions	New Pledges	Testamentary Commitments	Total Gift Commitments	2009/2010 General Fund	Gift Commitments as a Percent of the General Fund	Prior Year Pledge Write-offs
GROUP I								
Bakersfield	\$2,845,669	\$0	\$1,923,295	\$0	\$4,768,964	\$49,859,822	10%	-\$178,749
Channel Islands	\$894,810	\$28,617	\$1,997,234	\$0	\$2,920,661	\$38,120,853	8%	-\$14,650
Dominguez Hills	\$2,614,868	\$0	\$41,025	\$0	\$2,655,893	\$61,273,282	4%	-\$1,924
East Bay	\$3,577,989	\$0	\$1,163,550	\$350,000	\$5,091,539	\$67,857,621	8%	-\$15,495
Humboldt	\$4,697,004	\$10,750	\$1,725,797	\$812,269	\$7,245,821	\$62,436,110	12%	-\$100,652
Los Angeles	\$2,523,555	\$0	\$693,436	\$7,308,855	\$10,525,846	\$103,587,079	10%	-\$22,700
Maritime Academy	\$1,016,858	\$0	\$75,000	\$2,000	\$1,093,858	\$16,472,011	7%	\$0
Monterey Bay	\$3,101,633	\$140	\$463,624	\$0	\$3,565,397	\$46,061,803	8%	-\$100
San Bernardino	\$3,367,995	\$662,611	\$487,371	\$526,000	\$5,043,977	\$83,133,458	6%	-\$585
San Marcos	\$2,653,683	\$13,100	\$426,863	\$0	\$3,093,646	\$53,536,642	6%	\$0
Stanislaus	\$1,839,262	\$0	\$586,006	\$250,000	\$2,675,268	\$51,346,837	5%	-\$8,749
PEER GROUP I TOTAL	\$29,133,326	\$715,218	\$9,583,201	\$9,249,124	\$48,680,870	\$633,685,518	8%	-\$343,604
GROUP II								
Chico	\$6,232,992	\$0	\$5,000	\$876,200	\$7,114,192	\$90,188,102	8%	\$0
Fullerton	\$8,710,703	\$10,070	\$1,909,191	\$0	\$10,629,964	\$136,371,537	8%	-\$100,730
Northridge	\$7,729,312	\$0	\$1,460,634	\$4,195,000	\$13,384,946	\$148,718,316	9%	-\$238,307
Pomona	\$5,734,453	\$0	\$748,974	\$2,685,000	\$9,168,427	\$110,101,122	8%	\$0
Sacramento	\$7,653,039	\$0	\$575,180	\$1,641,000	\$9,869,219	\$126,087,817	8%	\$0
San Francisco	\$8,454,964	\$0	\$5,298,563	\$2,426,138	\$16,179,665	\$128,676,149	13%	-\$360,101
San José	\$8,804,213	\$0	\$935,744	\$10,665,000	\$20,404,957	\$125,111,472	16%	-\$260,869
Sonoma	\$2,299,506	\$39,361	\$219,091	\$955,973	\$3,513,931	\$51,085,673	7%	-\$232,249
PEER GROUP II TOTAL	\$55,619,182	\$49,431	\$11,152,377	\$23,444,311	\$90,265,301	\$916,340,188	10%	-\$1,192,256
GROUP III								
Fresno	\$14,973,450	\$11,348	\$365,900	\$0	\$15,350,698	\$118,055,402	13%	-\$417,564
Long Beach	\$10,329,201	\$0	\$3,182,170	\$15,434,000	\$28,945,371	\$154,573,278	19%	-\$1,085,000
San Diego	\$51,510,952	\$8,280	\$5,415,156	\$3,937,000	\$60,871,388	\$166,107,116	37%	-\$139,000
San Luis Obispo	\$10,770,023	\$0	\$4,859,220	\$3,491,000	\$19,120,243	\$110,289,288	17%	-\$23,450
PEER GROUP III TOTAL	\$87,583,626	\$19,628	\$13,822,446	\$22,862,000	\$124,287,700	\$549,025,084	23%	-\$1,665,014
Chancellor's Office	\$1,966,613	\$0	\$0	\$0	\$1,966,613	\$67,011,227	3%	\$0
SYSTEMWIDE TOTAL	\$174,302,747	\$784,277	\$34,558,024	\$55,555,435	\$265,200,484	\$2,166,062,017	12%	-\$3,200,874

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: Data submitted by Northridge conforms with 2008/2009 data reporting standards.

GIFT RECEIPTS BY SOURCE

2009/2010 Fiscal Year Chart III

	Individuals			Organizations			Gift Receipts Total	Total Number Individual Donors
	Alumni	Parents	Other Individuals	Foundations	Corporations	Other Organizations		
GROUP I								
Bakersfield	\$523,569	\$9,405	\$418,500	\$280,724	\$2,178,824	\$578,962	\$3,989,984	1,106
Channel Islands	\$28,755	\$10,166	\$641,806	\$553,223	\$285,792	\$125,363	\$1,645,105	424
Dominguez Hills	\$86,076	\$18,565	\$225,710	\$1,366,990	\$943,339	\$90,217	\$2,730,897	1,356
East Bay	\$215,958	\$8,002	\$496,735	\$524,599	\$2,175,775	\$371,551	\$3,792,620	2,096
Humboldt	\$1,028,005	\$386,666	\$629,777	\$2,128,771	\$1,074,035	\$674,148	\$5,921,402	8,121
Los Angeles	\$406,833	\$1,355	\$570,613	\$2,612,483	\$1,291,533	\$634,980	\$5,517,797	4,635
Maritime Academy	\$171,478	\$31,019	\$412,667	\$56,000	\$201,827	\$849,867	\$1,722,858	683
Monterey Bay	\$12,914	\$10,083	\$1,271,866	\$1,571,846	\$724,087	\$101,940	\$3,692,736	5,156
San Bernardino	\$170,971	\$38,432	\$1,387,032	\$1,325,565	\$1,470,617	\$107,242	\$4,499,859	2,721
San Marcos	\$19,477	\$16,030	\$1,483,861	\$986,046	\$869,118	\$613,245	\$3,987,777	781
Stanislaus	\$68,453	\$1,025	\$883,201	\$84,549	\$1,166,497	\$38,057	\$2,241,782	1,019
PEER GROUP I TOTAL	\$2,732,489	\$530,748	\$8,421,768	\$11,490,796	\$12,381,444	\$4,185,572	\$39,742,817	28,098
GROUP II								
Chico	\$810,701	\$195,422	\$2,006,945	\$1,900,636	\$1,463,122	\$46,796	\$6,423,622	13,440
Fullerton	\$2,672,375	\$151,428	\$3,077,898	\$1,267,265	\$4,027,443	\$458,479	\$11,654,888	7,483
Northridge	\$1,126,306	\$119,923	\$3,707,414	\$3,000,522	\$4,137,786	\$437,614	\$12,529,565	7,081
Pomona	\$874,945	\$31,475	\$1,726,700	\$410,425	\$1,157,381	\$1,708,277	\$5,909,203	4,719
Sacramento	\$518,870	\$0	\$6,778,342	\$1,799,776	\$1,238,921	\$290,174	\$10,626,083	35,545
San Francisco	\$1,498,733	\$81,450	\$4,898,948	\$3,655,131	\$2,242,741	\$599,640	\$12,976,643	6,883
San Jose	\$7,055,555	\$50,258	\$2,500,144	\$4,847,047	\$2,890,767	\$101,348	\$17,445,119	6,857
Sonoma	\$355,112	\$18,053	\$861,934	\$1,264,322	\$106,133	\$662,970	\$3,268,524	1,898
PEER GROUP II TOTAL	\$14,912,597	\$648,009	\$25,558,325	\$18,145,124	\$17,264,294	\$4,305,298	\$80,833,647	83,906
GROUP III								
FRESNO	\$7,232,728	\$51,974	\$3,652,557	\$5,319,620	\$2,845,235	\$109,210	\$19,211,324	9,237
LONG BEACH	\$1,946,207	\$399,392	\$4,338,530	\$1,069,342	\$3,458,639	\$1,662,089	\$12,874,199	24,013
SAN DIEGO	\$12,515,019	\$433,433	\$14,253,529	\$15,740,548	\$8,667,184	\$3,130,413	\$54,740,126	59,361
SAN LUIS OBISPO	\$3,789,822	\$1,377,028	\$2,158,520	\$3,172,580	\$5,834,205	\$1,915,527	\$18,247,682	16,194
PEER GROUP III TOTAL	\$25,483,776	\$2,261,827	\$24,403,136	\$25,302,090	\$20,805,263	\$6,817,239	\$105,073,331	108,805
Chancellor's Office	\$0	\$0	\$196,663	\$771,150	\$1,015,350	\$3,450	\$1,986,613	21
SYSTEMWIDE TOTAL	\$43,128,862	\$3,440,584	\$58,579,892	\$55,709,160	\$51,466,351	\$15,311,559	\$227,636,408	220,830

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

GIFT RECEIPTS BY PURPOSE

2009/2010 Fiscal Year Chart IV

	Current Programs		Capital Purposes				Deferred Gifts	Gift Receipts Total
	Unrestricted	Restricted	Campus Improvements: Property, Buildings and Equipment	Endowment		Loan Funds		
				Unrestricted	Restricted			
GROUP I								
Bakersfield	\$54,623	\$3,044,318	\$475,388	\$0	\$415,655	\$0	\$0	\$3,989,984
Channel Islands	\$298,636	\$1,133,271	\$3,650	\$0	\$209,548	\$0	\$0	\$1,645,105
Dominguez Hills	\$37,053	\$1,603,534	\$1,420	\$0	\$1,088,890	\$0	\$0	\$2,730,897
East Bay	\$130,438	\$3,255,267	\$746	\$500	\$395,669	\$0	\$10,000	\$3,792,620
Humboldt	\$328,586	\$3,640,193	\$114,500	\$109,419	\$1,728,574	\$130	\$0	\$5,921,402
Los Angeles	\$342,145	\$2,524,602	\$2,450,580	\$0	\$200,470	\$0	\$0	\$5,517,797
Maritime Academy	\$364,755	\$1,083,890	\$151,000	\$24,000	\$99,213	\$0	\$0	\$1,722,858
Monterey Bay	\$44,554	\$2,672,326	\$301,802	\$0	\$250,125	\$0	\$423,929	\$3,692,736
San Bernardino	\$6,697	\$3,036,572	\$545,498	\$0	\$415,731	\$0	\$495,361	\$4,499,859
San Marcos	\$45,568	\$2,466,802	\$1,081,004	\$0	\$394,403	\$0	\$0	\$3,987,777
Stanislaus	\$10,668	\$1,652,992	\$0	\$0	\$578,122	\$0	\$0	\$2,241,782
PEER GROUP I TOTAL	\$1,663,723	\$26,113,767	\$5,125,588	\$133,919	\$5,776,400	\$130	\$929,290	\$39,742,817
GROUP II								
Chico	\$364,008	\$1,888,041	\$0	\$79,890	\$4,091,318	\$365	\$0	\$6,423,622
Fullerton	\$174,127	\$7,008,324	\$567,680	\$0	\$3,357,017	\$0	\$547,740	\$11,654,888
Northridge	\$249,656	\$4,028,299	\$3,993,076	\$0	\$4,258,534	\$0	\$0	\$12,529,565
Pomona	\$114,425	\$3,428,220	\$1,535,462	\$0	\$445,134	\$0	\$385,962	\$5,909,203
Sacramento	\$156,791	\$6,353,102	\$995,721	\$0	\$3,070,469	\$0	\$50,000	\$10,626,083
San Francisco	\$337,619	\$6,674,924	\$981,458	\$0	\$2,584,506	\$0	\$2,398,136	\$12,976,643
San José	\$593,073	\$8,577,233	\$0	\$0	\$8,246,455	\$0	\$28,358	\$17,445,119
Sonoma	\$203,915	\$1,501,237	\$1,165,368	\$0	\$175,222	\$0	\$222,782	\$3,268,524
PEER GROUP II TOTAL	\$2,193,614	\$39,459,380	\$9,238,765	\$79,890	\$26,228,655	\$365	\$3,632,978	\$80,833,647
GROUP III								
Fresno	\$223,745	\$10,754,540	\$1,926,051	\$0	\$6,306,988	\$0	\$0	\$19,211,324
Long Beach	\$1,017,697	\$9,491,925	\$167,724	\$0	\$1,741,853	\$0	\$455,000	\$12,874,199
San Diego	\$53,283	\$41,620,928	\$0	\$0	\$6,158,809	\$0	\$6,907,106	\$54,740,126
San Luis Obispo	\$641,643	\$11,400,411	\$2,965,802	\$0	\$3,131,501	\$150	\$108,175	\$18,247,682
PEER GROUP III TOTAL	\$1,936,368	\$73,267,804	\$5,059,577	\$0	\$17,339,151	\$150	\$7,470,281	\$105,073,331
Chancellor's Office	\$81,950	\$1,842,125	\$0	\$0	\$62,538	\$0	\$0	\$1,986,613
SYSTEMWIDE TOTAL	\$5,875,655	\$140,683,076	\$19,423,930	\$213,809	\$49,406,744	\$645	\$12,032,549	\$227,636,408

CHARITABLE GIFT COMPARISONS

2009/2010 Fiscal Year Chart V

	2007/2008	2008/2009	2009/2010
SOURCE OF SUPPORT			
INDIVIDUALS			
Alumni	\$48,045,152	\$44,356,464	\$43,128,862
Parents	\$3,809,345	\$3,298,420	\$3,440,584
Others	\$83,153,313	\$68,924,437	\$58,579,892
INDIVIDUALS TOTAL	\$135,007,809	\$116,579,321	\$105,149,338
ORGANIZATIONS			
Foundations	\$64,040,030	\$84,757,105	\$55,709,160
Corporations	\$51,301,704	\$46,491,544	\$51,466,351
Others	\$12,698,756	\$12,467,637	\$15,311,559
ORGANIZATIONS TOTAL	\$128,040,490	\$143,716,286	\$122,487,070
SOURCE OF SUPPORT TOTAL	\$263,048,299	\$260,295,608	\$227,636,408
GIFT PURPOSES			
CURRENT OPERATIONS			
Unrestricted	\$6,302,133	\$6,487,544	\$5,875,655
Restricted	\$135,574,079	\$173,104,912	\$140,683,076
CURRENT OPERATIONS TOTAL	\$141,876,212	\$179,592,456	\$146,558,731
CAPITAL PURPOSES			
Property, Buildings and Equipment	\$32,449,316	\$24,619,169	\$19,423,930
Endowment: Unrestricted	\$1,124,482	\$71,931	\$213,809
Endowment: Restricted	\$66,829,995	\$38,926,315	\$49,406,744
Loan Funds	\$2,685	\$214,235	\$645
CAPITAL PURPOSES TOTAL	\$100,406,477	\$63,831,650	\$69,045,128
Deferred Gifts	\$20,765,610	\$16,871,501	\$12,032,549
GIFT PURPOSES TOTAL	\$263,048,299	\$260,295,608	\$227,636,408

Note 1: 2007/2008 Capital Purposes Total was revised to reflect \$40 data entry error in Loan Funds and Endowment: Unrestricted.

ENDOWMENT

2009/2010 Fiscal Year Chart VI

	2007/2008 Market Value	2008/2009 Market Value	2009/2010 Market Value	2008/2009 to 2009/2010 Comparison		2007/2008 Investment Return Rate	2008/2009 Investment Return Rate	2009/2010 Investment Return Rate	Three Year Average	2009/2010 Gifts to Endowment	2009/2010 Endowment Distribution
				Amount	Percentage						
GROUP I											
Bakersfield	\$16,415,000	\$13,013,485	\$14,542,510	\$1,529,025	11.75%	-3.01%	-15.41%	13.16%	-1.75%	\$415,655	\$240,724
Channel Islands	\$7,253,000	\$6,241,639	\$7,770,469	\$1,528,830	24.49%	-2.70%	-15.20%	13.90%	-1.33%	\$209,548	\$0
Dominguez Hills	\$6,567,000	\$6,033,290	\$7,871,105	\$1,837,815	30.46%	-5.12%	-10.30%	14.80%	-0.21%	\$1,088,890	\$0
East Bay	\$9,179,000	\$7,745,376	\$8,518,478	\$773,102	9.98%	-6.06%	-14.38%	12.41%	-2.68%	\$396,169	\$465,995
Humboldt	\$18,447,207	\$15,700,287	\$18,512,477	\$2,812,190	17.91%	0.00%	-14.80%	9.00%	-1.93%	\$1,837,993	\$364,441
Los Angeles	\$15,091,286	\$13,223,651	\$15,664,827	\$2,441,176	18.46%	-5.92%	-14.90%	12.80%	-2.67%	\$200,470	\$181,944
Maritime Academy	\$1,845,354	\$1,882,472	\$2,268,000	\$385,528	20.48%	-1.70%	-16.20%	18.60%	0.23%	\$123,213	\$29,400
Monterey Bay	\$7,014,521	\$7,676,318	\$9,554,374	\$1,878,056	24.47%	-1.70%	-12.60%	17.70%	1.13%	\$250,125	\$407,617
San Bernardino	\$14,189,699	\$13,401,462	\$16,426,507	\$3,025,045	22.57%	-5.78%	-18.30%	15.40%	-2.89%	\$415,731	\$307,881
San Marcos	\$16,222,000	\$12,991,702	\$14,610,064	\$1,618,362	12.46%	-7.46%	-20.11%	14.20%	-4.46%	\$394,403	\$198,160
Stanislaus	\$11,084,000	\$8,422,419	\$8,873,009	\$450,590	5.35%	-8.51%	-24.00%	-1.00%	-11.17%	\$578,122	\$2,669
PEER GROUP I TOTAL	\$123,308,067	\$106,332,101	\$124,611,820	\$18,279,719	17.19%	-4.54%	-16.30%	12.45%	-2.80%	\$5,910,319	\$2,198,831
GROUP II											
Chico	\$34,656,000	\$28,634,866	\$38,957,678	\$10,322,812	36.05%	-2.30%	-16.90%	9.70%	-3.17%	\$4,171,208	\$1,872,380
Fullerton	\$20,021,744	\$18,960,389	\$23,987,020	\$5,026,631	26.51%	-2.99%	-15.77%	13.44%	-1.77%	\$3,357,017	\$212,922
Northridge	\$55,379,000	\$48,920,302	\$54,881,873	\$5,961,571	12.19%	-5.40%	-19.70%	12.00%	-4.37%	\$4,258,534	\$709,418
Pomona	\$33,201,000	\$27,636,000	\$32,698,955	\$5,062,955	18.32%	-3.21%	-16.80%	15.63%	-1.46%	\$445,134	\$0
Sacramento	\$22,287,688	\$19,711,554	\$25,539,959	\$5,828,405	29.57%	-1.56%	-12.70%	7.70%	-2.19%	\$3,070,469	\$26,371
San Francisco	\$47,179,000	\$43,731,310	\$49,018,563	\$5,287,253	12.09%	-1.86%	-12.15%	9.66%	-1.45%	\$2,584,506	\$1,317,903
San José	\$50,108,000	\$40,517,427	\$55,110,262	\$14,592,835	36.02%	-11.80%	-22.40%	15.50%	-6.23%	\$8,246,455	\$1,213,505
Sonoma	\$35,601,552	\$26,036,684	\$27,974,087	\$1,937,403	7.44%	-3.94%	-22.70%	9.30%	-5.78%	\$175,222	\$718,253
PEER GROUP II TOTAL	\$298,433,984	\$254,148,532	\$308,168,397	\$54,019,865	21.26%	-4.69%	-17.67%	11.86%	-3.50%	\$26,308,545	\$6,070,752
GROUP III											
Fresno	\$104,746,000	\$91,339,899	\$111,566,395	\$20,226,496	22.14%	-6.13%	-13.81%	12.04%	-2.63%	\$6,306,988	\$5,123,832
Long Beach	\$36,616,000	\$31,070,238	\$36,563,866	\$5,493,628	17.68%	-4.36%	-19.90%	15.10%	-3.05%	\$1,741,853	\$69,007
San Diego	\$115,090,000	\$98,559,000	\$109,401,000	\$10,842,000	11.00%	-5.40%	-18.00%	16.22%	-2.39%	\$6,158,809	\$3,733,000
San Luis Obispo	\$166,179,000	\$130,946,796	\$146,772,634	\$15,825,838	12.09%	-6.20%	-18.50%	15.50%	-3.07%	\$3,131,501	\$5,969,561
PEER GROUP III TOTAL	\$422,631,000	\$351,915,933	\$404,303,895	\$52,387,962	14.89%	-5.81%	-17.26%	14.70%	-2.79%	\$17,339,151	\$14,895,400
Chancellor's Office	\$9,210,000	\$7,912,513	\$9,056,686	\$1,144,173	14.46%	-2.40%	-12.00%	14.94%	0.18%	\$62,538	\$119,218
SYSTEMWIDE TOTAL	\$853,583,051	\$720,309,079	\$846,140,798	\$125,831,719	17.47%	-5.20%	-17.21%	13.34%	-3.02%	\$49,620,553	\$23,284,201

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

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

Note 3: Chancellor's Office 2008/2009 market value was revised after 2008/2009 report went to print and now includes quasi-endowment data.

Note 4: San Diego 2008/2009 market value was revised after 2008/2009 report went to print and now reflects audited market value.

Note 5: Los Angeles distribution to endowed scholarships and programs was funded by an internal loan.

Note 6: Sonoma distribution to endowed scholarships and programs was funded by other unrestricted funds.

ALUMNI **2009/2010 Fiscal Year Chart VII**

	Number of Addressable Alumni	Alumni Association Members			Membership Dues Collected	Alumni Solicited	Alumni Donors	Total Alumni Contributions	Percentage of Alumni Contributions from Association Members	Total Contributions from Alumni Association Members
		Annual	Lifetime	Total						
GROUP I										
Bakersfield	34,864	29,024	201	29,225	\$0	19,572	511	\$523,569	100.00%	\$523,569
Channel Islands	4,299	978	46	1,024	\$9,690	4,200	20	\$28,755	96.24%	\$27,675
Dominguez Hills	59,525	0	1,006	1,006	\$0	59,525	888	\$86,076	26.58%	\$22,883
East Bay	88,151	1,637	2,055	3,692	\$12,235	79,846	1,251	\$215,958	4.28%	\$9,252
Humboldt	46,293	1,067	2,678	3,745	\$33,945	20,816	4,047	\$1,028,005	16.25%	\$167,057
Los Angeles	117,874	8,953	1,582	10,535	\$78,588	30,670	3,371	\$406,833	5.19%	\$21,132
Maritime Academy	4,101	0	4,802	4,802	\$0	4,012	450	\$171,478	100.00%	\$171,478
Monterey Bay	5,800	203	1,098	1,301	\$23,985	5,800	131	\$12,914	75.54%	\$9,755
San Bernardino	57,713	2,249	723	2,972	\$47,083	31,864	992	\$170,971	43.58%	\$74,511
San Marcos	23,000	785	116	901	\$7,440	12,092	86	\$19,477	2.18%	\$425
Stanislaus	46,249	0	37,844	37,844	\$0	41,624	287	\$68,453	89.94%	\$61,564
PEER GROUP I TOTAL	487,869	44,896	52,151	97,047	\$212,966	310,021	12,034	\$2,732,489	39.86%	\$1,089,301
GROUP III										
Chico	135,215	1,264	890	2,154	\$78,010	100,963	6,837	\$810,701	27.69%	\$224,468
Fullerton	185,926	2,668	2,348	5,016	\$109,692	123,960	4,669	\$2,672,375	77.52%	\$2,071,618
Northridge	205,397	10,068	1,153	11,221	\$87,630	174,395	4,010	\$1,126,306	77.52%	\$873,115
Pomona	116,290	1,082	2,036	3,118	\$36,346	55,458	3,461	\$874,945	37.48%	\$327,893
Sacramento	179,369	2,682	2,438	5,120	\$114,405	42,324	3,788	\$518,870	30.51%	\$158,302
San Francisco	245,750	0	4,359	4,359	\$40,903	41,481	3,971	\$1,498,733	7.24%	\$108,531
San José	218,144	5,474	5,172	10,646	\$224,805	218,144	3,452	\$7,055,555	75.19%	\$5,305,197
Sonoma	55,107	1,025	1,189	2,214	\$15,470	5,387	390	\$355,112	25.99%	\$92,301
PEER GROUP II TOTAL	1,341,198	24,263	19,585	43,848	\$707,261	762,112	30,578	\$14,912,597	61.43%	\$9,161,425
GROUP III										
Fresno	172,590	2,068	2,169	4,237	\$97,571	115,334	5,530	\$7,232,728	32.72%	\$2,366,393
Long Beach	235,155	34,743	786	35,529	\$74,127	137,901	10,127	\$1,946,207	38.11%	\$741,649
San Diego	219,508	2,209	5,277	7,486	\$237,907	93,885	5,446	\$12,515,019	61.69%	\$7,720,627
San Luis Obispo	143,539	3,670	10,084	13,754	\$153,517	37,474	7,883	\$3,789,822	31.05%	\$1,176,769
PEER GROUP III TOTAL	770,792	42,690	18,316	61,006	\$563,122	384,594	28,986	\$25,483,776	47.11%	\$12,005,438
SYSTEMWIDE TOTAL	2,599,859	111,849	90,052	201,901	\$1,483,349	1,456,727	71,598	\$43,128,862	51.60%	\$22,256,164

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 2006/2007, Maritime Academy discontinued dues membership; all alumni are now given free lifetime membership to the Alumni Association.

Note 3: In 2006/2007, Stanislaus discontinued dues membership; a new program now includes all degreed alumni in the Donor Association.

Note 4: In 2006/2007, Dominguez Hills discontinued dues membership; alumni can now join the association for free.

Note 5: In 2009/2010, Bakersfield discontinued dues membership; as part of a new strategic plan, everyone is now an association member.

Note 6: In 2006/2007, San Francisco restructured its membership dues program to offer only lifetime membership.