

AGENDA

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Meeting: 1:00 p.m., Tuesday, March 25, 2014
Glenn S. Dumke Auditorium

Hugo N. Morales, Chair
Douglas Faigin, Vice Chair
Roberta Achtenberg
Rebecca D. Eisen
Debra S. Farar
Margaret Fortune
Steven G. Stepanek
Cipriano Vargas

Consent Items

Approval of minutes of meeting of January 29, 2014

Discussion Items

1. Measuring Advancement, *Information*
2. Naming of an Academic Program—California State University, Northridge, *Action*
3. Naming of a Facility – California State University, Fresno, *Action*

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

January 29, 2014

Members Present

Hugo N. Morales, Chair
Roberta Achtenberg
Rebecca Eisen
Douglas Faigin
Debra Farar
Margaret Fortune
Bob Linscheid, Chair of the Board
Steven G. Stepanek
Cipriano Vargas
Timothy P. White, Chancellor

Trustee Morales called the meeting to order.

Approval of Minutes

The minutes of September 24, 2013 were approved as submitted.

Naming of a Facility – San Diego State University

Mr. Garrett P. Ashley, vice chancellor for university relations and advancement, reported that the proposed naming recognizes a \$20 million contribution by Conrad Prebys in support of student scholarship endeavors in seven specific areas: creative and performing arts, bio-medical research, student leaders, veterans, former foster youth, honor scholars and entrepreneurs.

The committee unanimously recommended approval by the board of the proposed resolution (RIA 01-14-01) that the Aztec Student Union (building 52) at San Diego State University be named The Conrad Prebys Aztec Student Union.

Naming of a Facility – San Diego State University

Mr. Ashley reported that the proposed naming recognizes California Coast Credit Union's contribution of \$3,250,000 over a ten-year term that will enable the Open Air Theatre to receive a number of facility upgrades.

Inst. Adv.

President Elliot Hirshman shared that California Coast Credit Union has played an important role in the personal and professional development of San Diego State University student and alumni.

Chancellor White thanked Ms. Rene McKee, vice president of marketing and community relations at California Coast Credit Union, for the partnership in upgrading an important community resource and venue that enhances student life.

The committee unanimously recommended approval by the board of the proposed resolution (RIA 01-14-02) that the Open Air Theatre at San Diego State University be named the Cal Coast Credit Union Open Air Theatre for a term of ten years.

Naming of a Facility – Sonoma State University

Mr. Ashley reported that the proposed naming recognizes a \$3 million gift by the Wine Spectator Scholarship Foundation, which will allow the university to refurbish the University Commons Building as a learning center for the Wine Business Institute.

President Ruben Armiñana shared that this donation will allow for a state-of-the art facility for teaching, learning and research for the wine business program. He thanked Dr. William Silver, dean of the school of business and economics, for his leadership in securing this gift.

The committee unanimously recommended approval by the board of the proposed resolution (RIA 01-14-03) that the University Commons Building at Sonoma State University be named The Wine Spectator Learning Center.

Approval of the 2012-2013 Annual Report on Philanthropic Support to the California State University

Mr. Ashley extended thanks to the trustees, presidents, campus teams, and donors for a record year of gifts received as well as record-high endowment levels.

Ms. Lori Redfearn, assistant vice chancellor for systemwide advancement, presented the report. The CSU garnered \$338 million in gift commitments in 2012-2013. Charitable receipts rose to a record \$283 million.

In 2012-2013, gift receipts from organizations increased 11% to \$147 million. Giving from individuals also increased significantly with nearly \$136 million from more than 221,000 donors, a third of whom are CSU alumni.

For the third consecutive year, the total market value for CSU endowments exceeded \$1 billion, reaching a historic high this year at almost \$1.2 billion for the CSU system and campuses.

Dr. Beverly Young, assistant vice chancellor for teacher education and public school programs, introduced Ms. Anne Stanton, program director for the James Irvine Foundation. The James

Irvine Foundation has led the state and the nation as a supporter of Linked Learning, a major high school reform that integrates real-world career preparation with rigorous academic preparation. The foundation has awarded a \$1.5 million grant to the CSU to prepare educators in the Linked Learning model and allow partnerships with the K-12 and community college systems to ensure seamless career pathways.

Ms. Felicia Anderson, assistant principal at David Starr Jordan High School and education doctoral candidate at CSU Long Beach, shared her personal experiences in studying the impact of Linked Learning.

The committee unanimously recommended approval by the board of the proposed resolution (RIA 01-14-04) adopting the *2012-2013 Annual Report of Philanthropic Support to the California State University* for submission to the California Joint Legislative Budget Committee and the California Department of Finance.

Trustee Morales adjourned the meeting.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Measuring Advancement

Presentation By

Garrett Ashley
Vice Chancellor
University Relations and Advancement

Lori A. Redfearn
Assistant Vice Chancellor
Advancement Services

Summary

The information item will present fundraising performance and return on investment data.

Background

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

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

With the guidance of these principles, the Chancellor and campus presidents develop annual goals and performance review recommendations.

Goal Dashboards

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

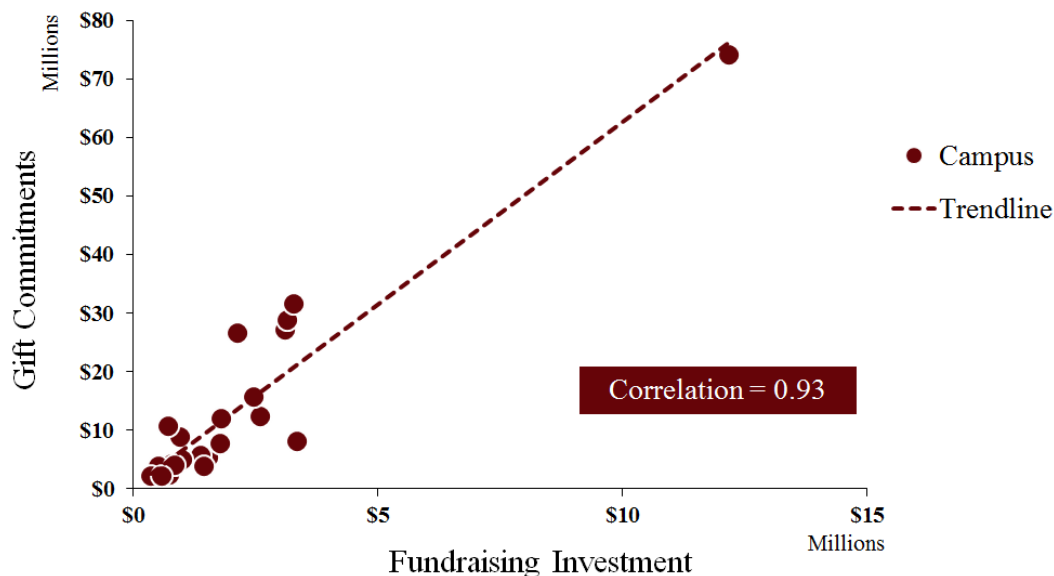
Campus Investments in Advancement

For 2012-2013, the California State University system's return on fundraising investment in relation to gift commitments of over \$338 million was 630 percent. The CSU experienced the same return on investment when viewed over a 3-year period. This means for every dollar invested in fundraising, \$6.30 was returned to support the university. The CSU performance exceeds the national average return of \$5.47 reported by master's universities in the CASE Advancement Investment Metric Study.

The three-year average cost to raise a dollar for the system was 16 cents. For a comprehensive fundraising operation, the target range for the cost to raise a dollar is 15 to 25 cents.

The next chart compares the three-year average of gift commitments compared to the three-year average of fundraising investments. With a 93 percent positive correlation between investments in fundraising and resulting gift commitments, the trend line shown is a good indicator for understanding the investment that is necessary to reach fundraising goals.

Dollars Invested is Significantly Related to Dollars Raised



Chancellor's Office Investment in Campus Programs

The Chancellor's Office has reinvested in professional development of campus teams:

- Fundraising Workshops for Academic Leaders were held in Long Beach and San Francisco to explore donor motivation and the essential roles that deans, faculty, and other academic leaders play in helping donors make significant contributions to the institution. Participants engaged in the development of compelling vision stories.
- A four-part webinar series about Charitable Gift Planning provided strategies for addressing planned giving opportunities and tax implications for donations of various assets.
- An international expert in annual fund programs has been engaged to share information about innovations in the field and successful practices.

Through the services of Senior Advisor Theresa Mendoza, the Chancellor's Office continues to provide campuses with custom consultations related to campaign readiness, board engagement and organization effectiveness.

Regional all-campus alumni receptions have proven an effective resource for campuses to engage potential donors. CSU Chico received a \$1.5 million gift as the result of contacting a prospect about the New York City Tri-State reception.

Council for Advancement and Support of Education Awards

One indication of campus performance is recognition through the Council for Advancement and Support of Education awards for superior achievement in the field of university advancement. Eight CSU campuses and the Chancellor's Office were recognized. These awards were given by CASE District VII, which encompasses Arizona, California, Guam, Hawaii, Nevada and Utah.

Awards

California State University, Office of the Chancellor

- Gold in *Advancement Services Programs - Overall Operations*: “‘Work Smarter’ Internal Marketing Campaign”

California State University, Chico

- Silver in *Social Media*: “Crowdsourcing the Chico State Class of 2013 Commencement Story”

California State University, Dominguez Hills

- Bronze in *Websites - Complete Institutional Websites*: “CSUDH Web Site Redesign”

- Bronze in *Student Recruitment Publications - Print Viewbooks and Prospectuses*: “CSUDH View Book”

California State University, Fresno

- Bronze in *Photography - Individual Photography*: “Individual Photography - dmondson”
- Silver in *Public Relations, Media Relations, and Community Relations Projects*: “Fresno State - Welty Gala”
- Bronze in *PSAs and Commercial Spots*: “What Day Is It? It's Hump Day!” (Fresno State Alumni Association)
- Bronze in *Best Articles of the Year*: “Dr. Castro: Student success is top priority”

California State University, Fullerton

- Bronze in *Alumni Relations Programs - Volunteer Engagement and Leadership*: “Alumni Chapters Online Program Proposal & Evaluation Forms”

California State University, Northridge

- Silver in *External Audience Newsletters - Print External Audience Newsletters*: “Community@CSUN External Audience Newsletter”

California State Polytechnic University, Pomona

- Silver in *News and Research Videos*: “Hospitality Uncorked 2013” (The Collins College of Hospitality Management)
- Bronze in *Recruitment Videos*: “Discover Cal Poly Pomona”

California State University, Sacramento

- Gold in *Advertising - Advertising Campaigns*: “Made at Sac State”
- Silver in *PSAs and Commercial Spots*: “‘Going All the Way’ Television Commercial”

California Polytechnic State University, San Luis Obispo

- Gold in *Alumni Relations Programs - Volunteer Engagement and Leadership*: “California Polytechnic State University's Alumni Ambassador Program”

University Advancement

Campus Plans Dashboards

2013-14

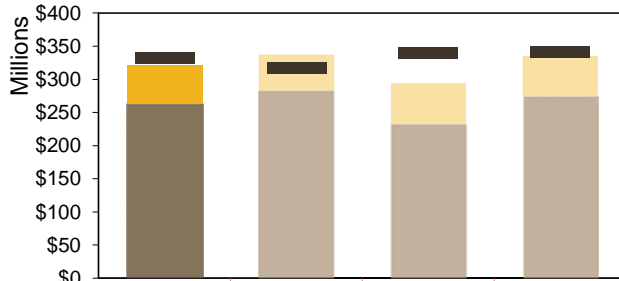
Campus: **CSU**
Peer Group: **Systemwide**

*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

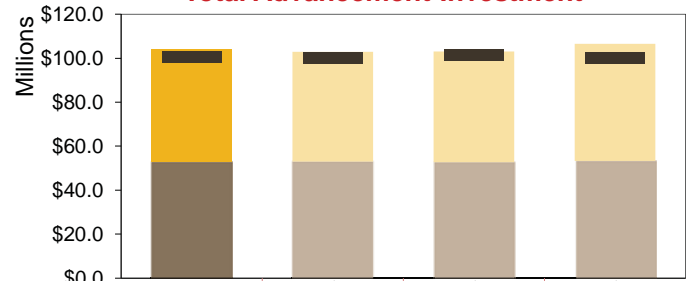
■ Actual — Goal

Gift Commitments



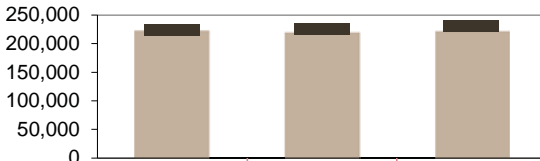
| | 3 Yr Ave* | 10/11 | 11/12 | 12/13 |
|---------------|---------------|---------------|---------------|---------------|
| Testamentary | \$58,723,449 | \$54,155,666 | \$61,651,616 | \$60,363,066 |
| Current Gifts | \$263,662,872 | \$283,157,407 | \$232,889,364 | \$274,941,846 |
| - Goal | \$331,807,969 | \$316,511,310 | \$338,494,184 | \$340,418,414 |
| Performance | 97% | 107% | 87% | 98% |
| Campus Min | 49% | 35% | 31% | 29% |
| Campus Max | 194% | 228% | 181% | 235% |

Total Advancement Investment



| | 3 Yr Ave* | 10/11 | 11/12 | 12/13 |
|--------------|---------------|--------------|---------------|--------------|
| Fundraising | \$51,169,225 | \$49,941,448 | \$50,362,659 | \$53,203,568 |
| Non-FR Inv't | \$52,957,485 | \$52,969,107 | \$52,663,600 | \$53,239,749 |
| - Goal | \$100,444,381 | \$99,976,079 | \$101,419,623 | \$99,937,441 |
| Performance | 104% | 103% | 102% | 107% |
| Campus Min | 83% | 75% | 68% | 72% |
| Campus Max | 125% | 136% | 131% | 147% |

Number of Individual Donors



| | 10/11 | 11/12 | 12/13 |
|-------------|---------|---------|---------|
| Actual | 222,430 | 219,490 | 221,351 |
| Goal | 223,329 | 225,782 | 230,580 |
| Performance | 100% | 97% | 96% |
| Campus Min | 35% | 52% | 69% |
| Campus Max | 129% | 142% | 118% |

Number of Alumni Donors

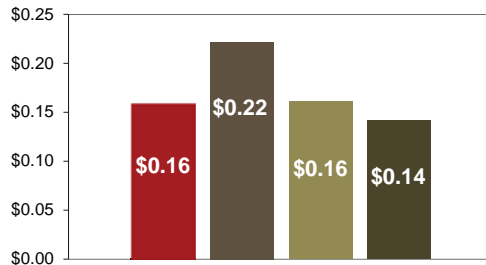


| | 10/11 | 11/12 | 12/13 |
|-------------|--------|--------|--------|
| Actual | 71,744 | 73,790 | 72,875 |
| Goal | 72,291 | 81,436 | 83,732 |
| Performance | 99% | 91% | 87% |
| Campus Min | 37% | 26% | 35% |
| Campus Max | 193% | 183% | 204% |

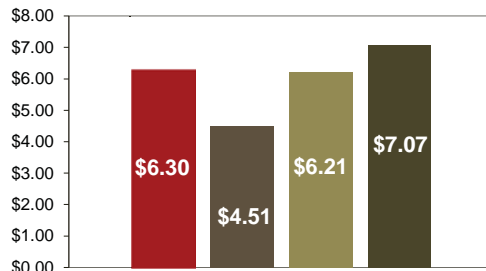
MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

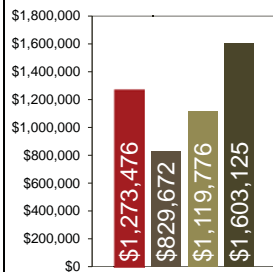
Cost to Raise a Dollar



Return on Investment

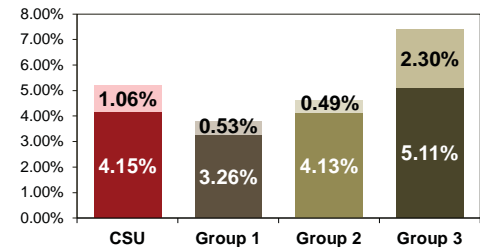


Gift Commitments per FTE Fundraising Professional

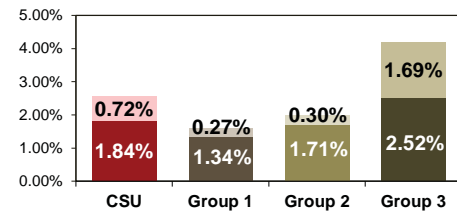


Investment as a Percentage of State General Fund

Total Advancement Expenditures



Fundraising Expenditures

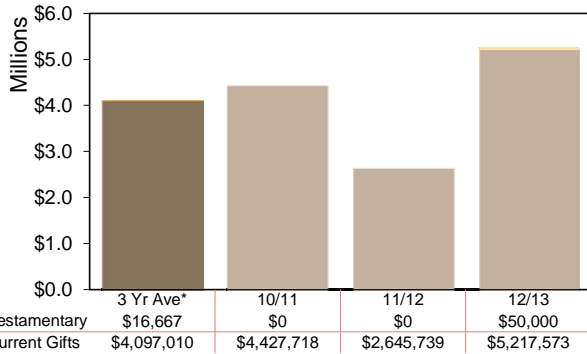


Campus: **Bakersfield**
Peer Group: 1

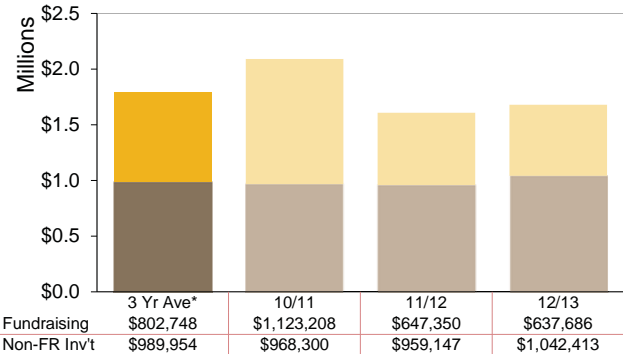
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

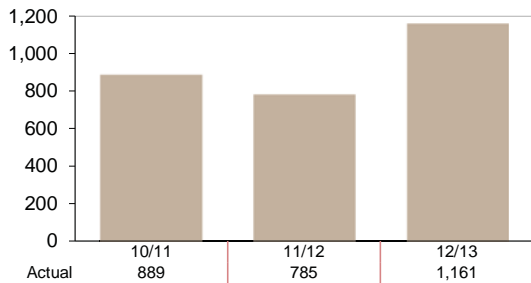
Gift Commitments



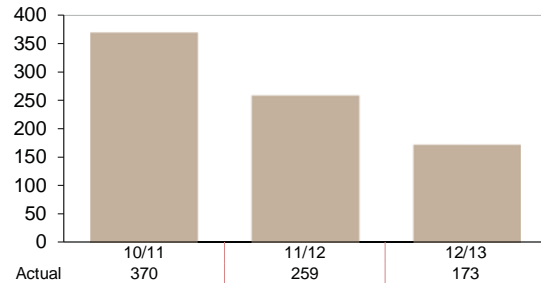
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



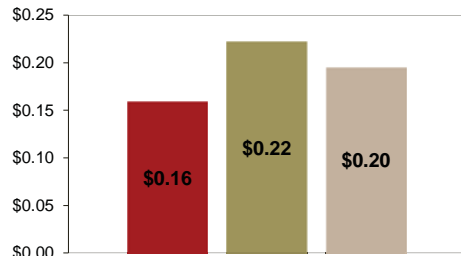
MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

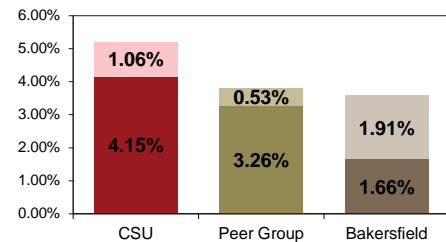
Investment as a Percentage of State General Fund

- CSU Average
- Peer Group Average
- Bakersfield Average

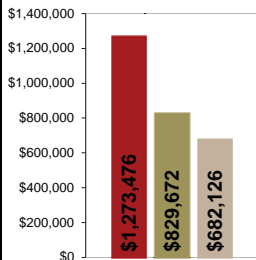
Cost to Raise a Dollar



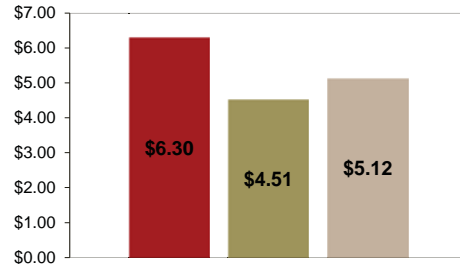
Total Advancement Expenditures



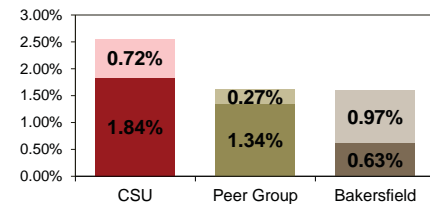
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

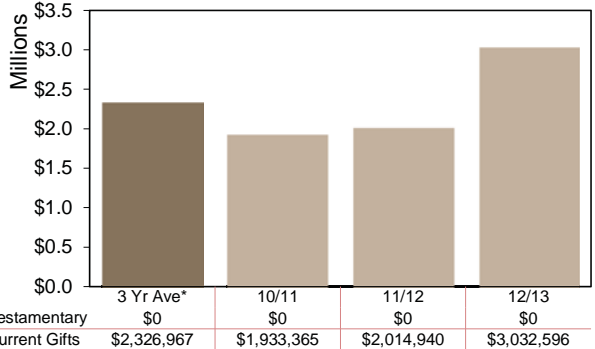
CSUB remains committed to providing a quality, accessible education that advances the mission of the California State University system. The University's Advancement Department plays a vital role in achieving this goal by working with local, regional and national stakeholders that can provide the level of resources that enhance the work of the University and extends its reach in the greater community to increase the educational attainment of students. In 2012-13, University Advancement continued to increase philanthropic support from alumni, community members, corporations, and foundations vested in the success of the University and the California State University system. The university realized a \$1 million planned gift that endowed a scholarship fund for students in its Honors Program. Also, major grants through the reporting period include: \$860,000 supporting sciences-based undergraduate programs; \$500,000 endowing an undergraduate scholarship fund for students transferring from the community college district; \$200,000 for undergraduate scholarship support; \$136,700 dedicated to faculty and student academic programs; and \$120,000 for a capital projects developed through CSUB's Athletic program. University Advancement continues to reorganize departments within the division to increase its fundraising base and engage greater numbers of constituents that can support University initiatives. University Advancement continues to modify its personnel within the division to support its fundraising and outreach efforts. In addition, two new positions focused on major gift fundraising and donors relations will be recruited in the winter of 2014.

Campus: **Channel Islands**
Peer Group: 1

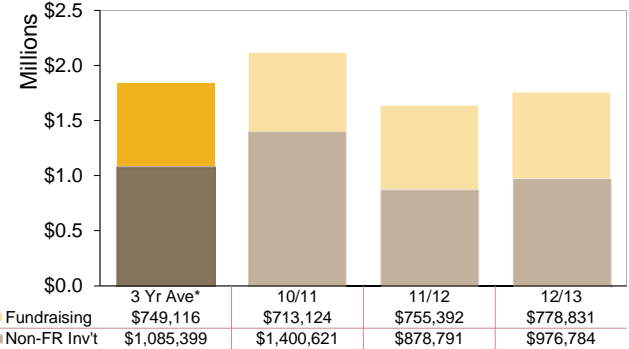
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

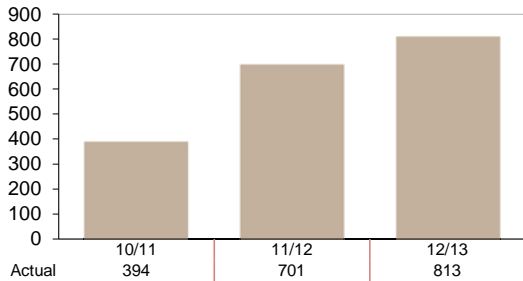
Gift Commitments



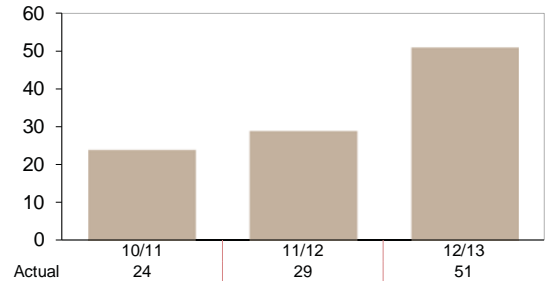
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



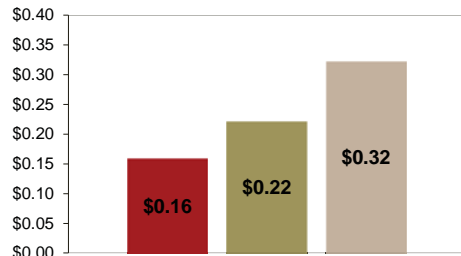
MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

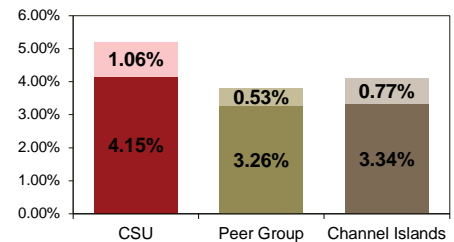
Investment as a Percentage of State General Fund

■ CSU Average
■ Peer Group Average
■ Channel Islands Average

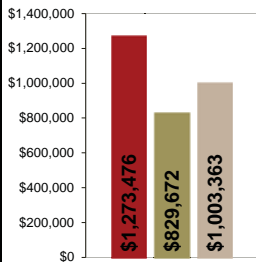
Cost to Raise a Dollar



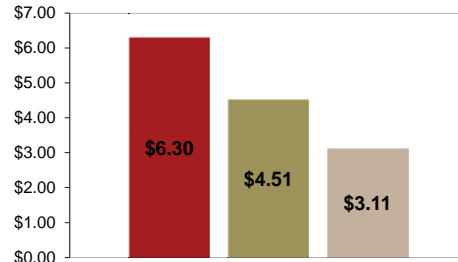
Total Advancement Expenditures



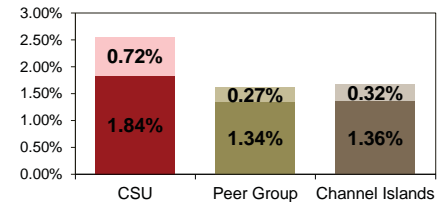
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

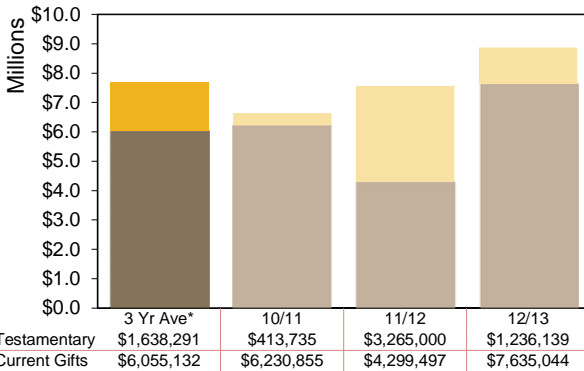
CSU Channel Islands continues to set aggressive goals in an effort to ensure that students are being placed at the center of the educational experience and receiving the highest quality education possible. University Advancement continues to play a large and critical role in securing the resources needed to accomplish these goals. The reorganization of Advancement out of the Office of the President, filling the Vice President for University Advancement position, and the hiring of several new positions such as the Donor Relations and Stewardship Assistant, Director of Advancement Operations, and Director of Planned and Major Gifts will result in a more effective and robust division. With these additional staff resources, the Advancement effort will concentrate on increasing support from Alumni and building a strong planned giving program that will result in major support of the University now and in the years ahead. The Foundation Board continues to grow and add key, high-level community leaders to its ranks. Under the leadership of President Rush, Foundation Board giving has significantly increased from prior years and several influential prospective donors have been introduced to the University. In addition, November marked the launch of a strong annual fund program which has already served to complement our existing fundraising programs and reinforce the University's rebranding campaign.

Campus: **Chico**
Peer Group: **2**

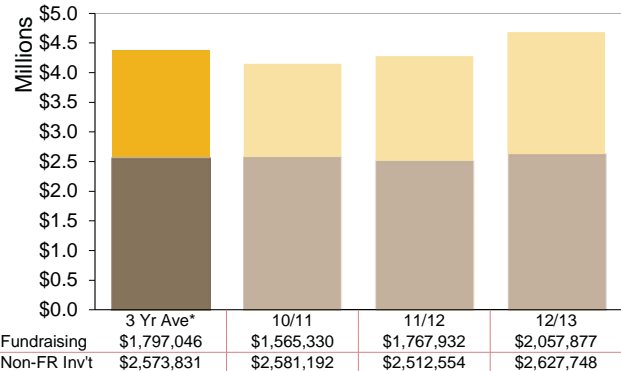
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

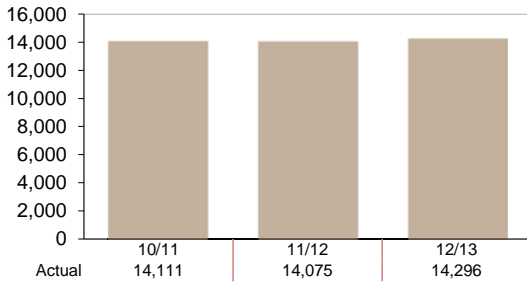
Gift Commitments



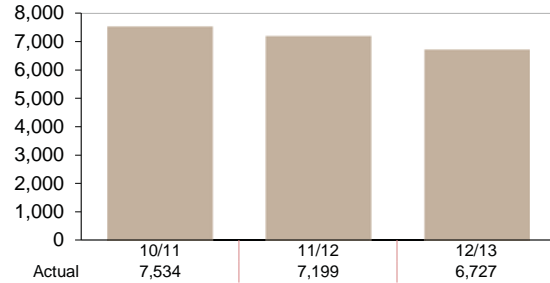
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



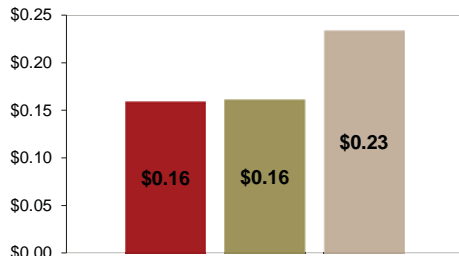
MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

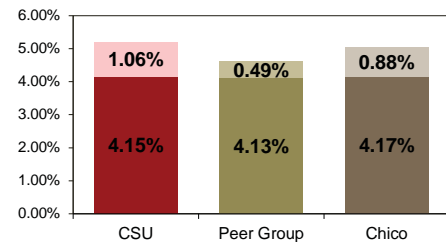
Investment as a Percentage of State General Fund

■ CSU Average
■ Peer Group Average
■ Chico Average

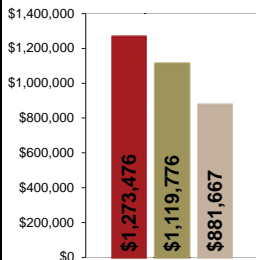
Cost to Raise a Dollar



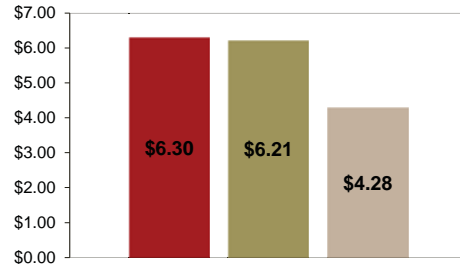
Total Advancement Expenditures



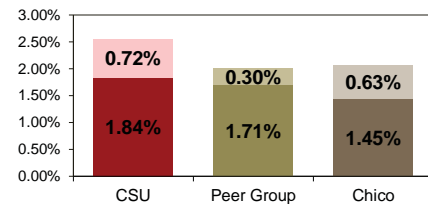
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

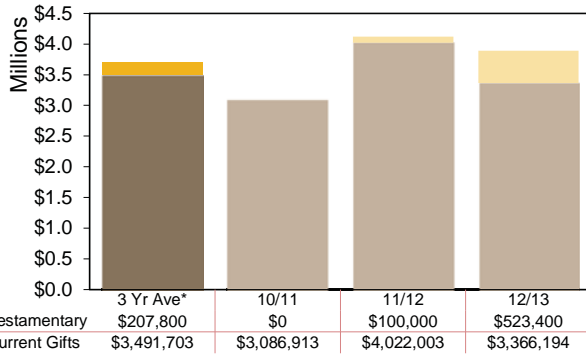
Building on the success of Chico State's yearlong celebration of our 125th anniversary last year, campus leaders are focused on how higher education, and in particular the CSU, can best support the civic and economic goals of the state of California. With the implementation of the North State Initiative and the Diversity Action Plan, along with the current process of updating the campus Academic Plan, critical strategies and plans are now in place to advance the institution on multiple fronts. As Chico State's first-ever comprehensive campaign commences its second year in the quiet phase, Provost and Vice President for Academic Affairs Belle Wei has concluded successful searches for three new deans in the Colleges of Business, Communication and Education, and Humanities and Fine Arts. A search is currently under way for a new dean for the College of Natural Sciences. These academic leaders will play a critical role in the continued articulation of the vision and plans of each college as they relate to the success of the comprehensive campaign and strengthening the campus's culture of philanthropy.

Campus: **Dominguez Hills**
Peer Group: **1**

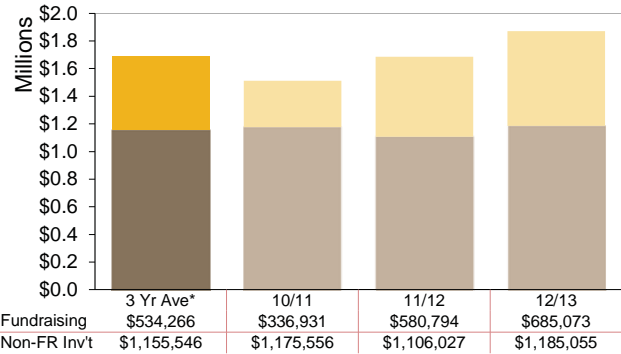
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

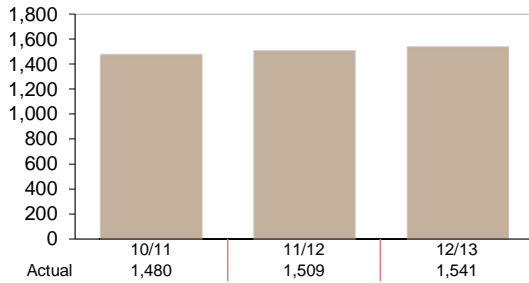
Gift Commitments



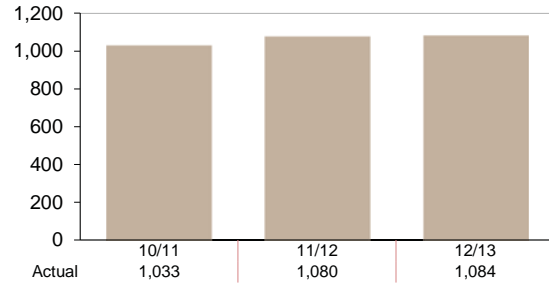
Total Advancement Investment



Number of Individual Donors



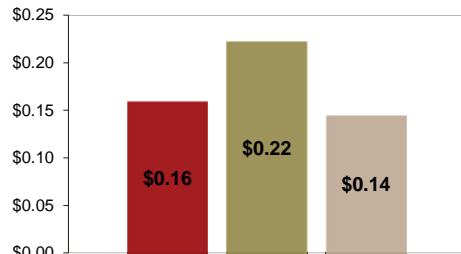
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

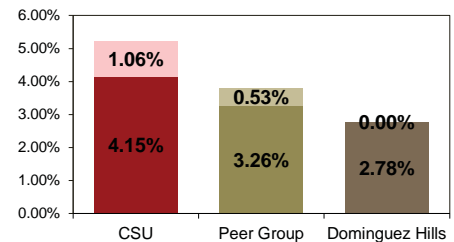
Cost Benefit Analysis

Cost to Raise a Dollar

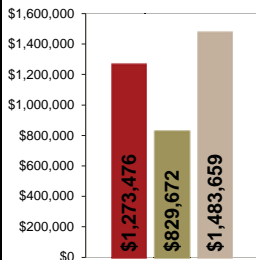


Investment as a Percentage of State General Fund

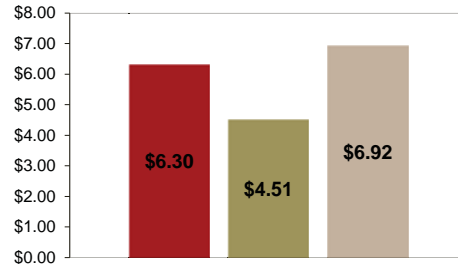
Total Advancement Expenditures



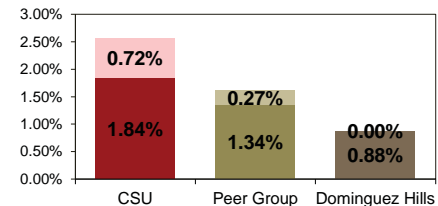
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

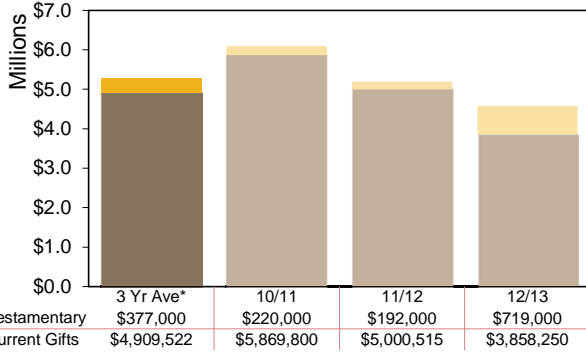
Dr. Willie J. Hagan was named permanent President of California State University, Dominguez Hills in May 2013. Under the leadership of President Hagan, the Division of University Advancement at CSU Dominguez Hills will continue its role as a leader in creating a culture of philanthropy on campus and a catalyst to grow the influence and impact of CSU Dominguez Hills in the South Bay and Greater Los Angeles region. This past year has seen a transition in leadership in University Advancement. With the departure of Greg Saks as Vice President for University Advancement in December 2012, Jeff Poltorak was appointed Interim Vice President for the division and served in that capacity throughout the past calendar year. Carrie Stewart was named permanent Vice President of University Advancement and began on January 13, 2014. By using the goals outlined by President Hagan as a compass, University Advancement continues to thoughtfully and comprehensively expand the opportunities for student success and resource enhancement for the on-campus community. CSU Dominguez Hills had another strong fundraising year in FY 2012-13, bringing in \$3.9 million through corporate, foundation and individual support. The number of donors to the university increased by 10% over the previous year, with the number of alumni donors increasing by more than 12%. Fiscal year 2012-13 also saw a growth of more than 50% in the number of cash gifts over in-kind gifts received. In addition, the university maintained its pace in the number of media placements and hosted over 45 university partnership programs affiliated with community and political groups that were organized by University Advancement.

Campus: **East Bay**
Peer Group: 1

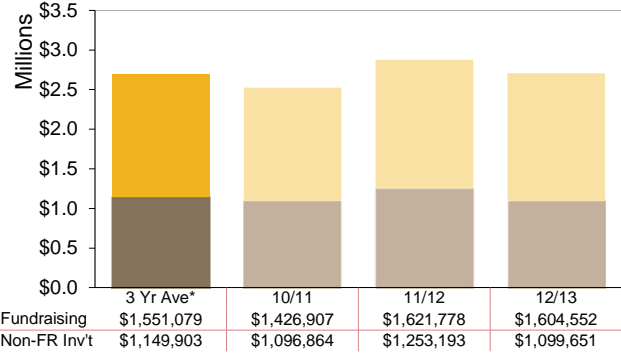
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

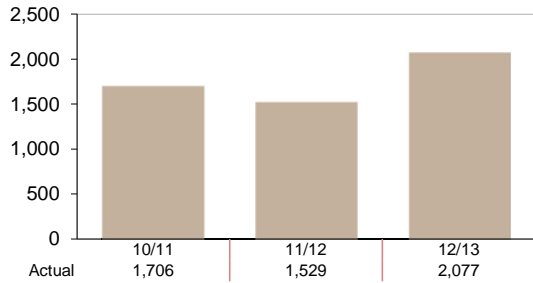
Gift Commitments



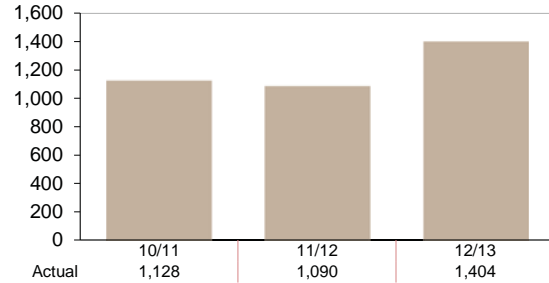
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



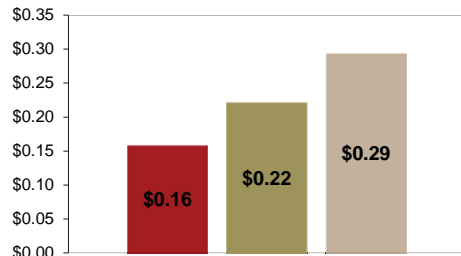
MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

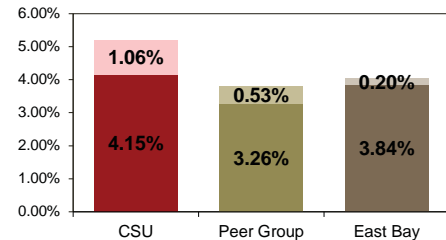
Investment as a Percentage of State General Fund

- CSU Average
- Peer Group Average
- East Bay Average

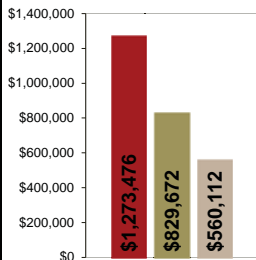
Cost to Raise a Dollar



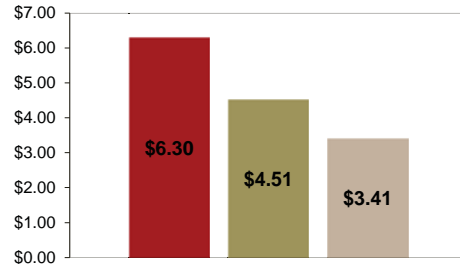
Total Advancement Expenditures



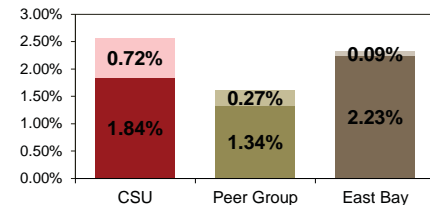
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

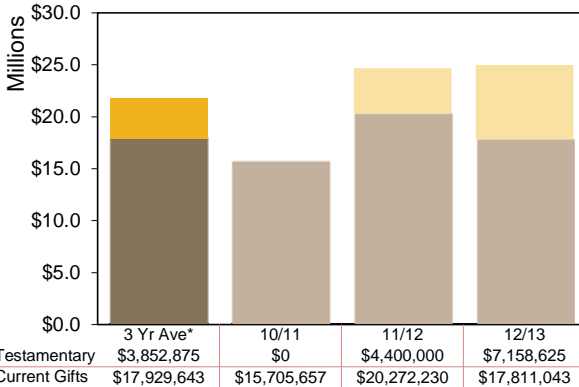
California State University, East Bay has been working on the development of a multi-year plan for advancement that encompasses all aspects of fundraising as well as alumni relations, communications and marketing, events and engagement. As part of this strategic approach to advancement, the university is also reviewing the comprehensive campaign to ensure its alignment with current needs as well as potential for success with current and prospective donors. The past year has included changes in leadership as well as other staff positions. A new Vice President for University Advancement was hired for the university and the Interim Vice President left for another career opportunity. The position of the Associate Vice President for Development that had been vacant for the entire year will now have an Interim person in the role (starting January 2014) while a national search will take place to fill the position on a more permanent basis by July 2014. The search for a permanent Executive Director for University Communications has resulted in hiring Jeff Bliss to serve in this capacity as of January 2014. Several members of the advancement team have left the university during the past year resulting in vacant positions. In tandem with these changes, and in order to support the new multi-year plan, a new organizational structure has been created. This investment by the university will allow CSU East Bay to have appropriate staffing for undertaking the advancement activities that are conducive to success for heightening our communications, alumni relations, and fundraising efforts.

Campus: **Fresno**
Peer Group: **3**

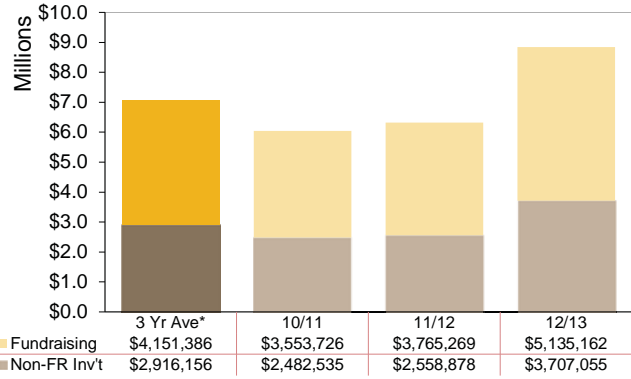
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

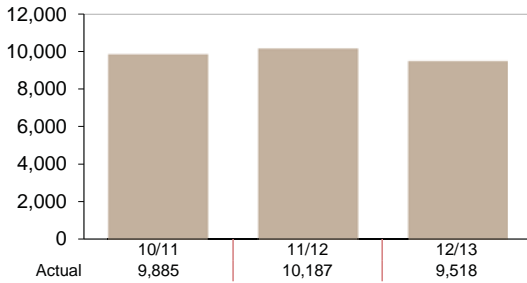
Gift Commitments



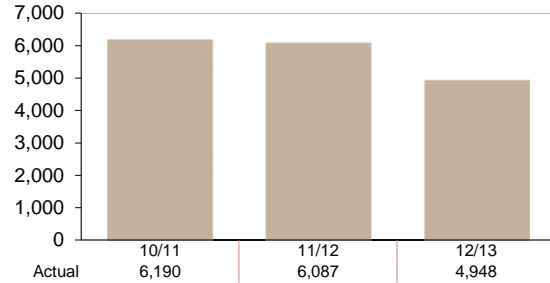
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



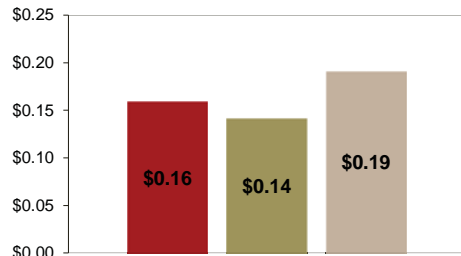
MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

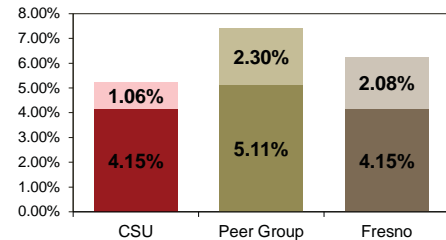
Investment as a Percentage of State General Fund

- CSU Average
- Peer Group Average
- Fresno Average

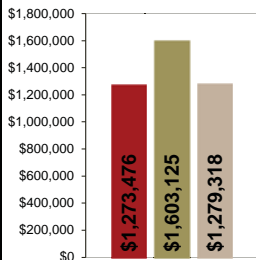
Cost to Raise a Dollar



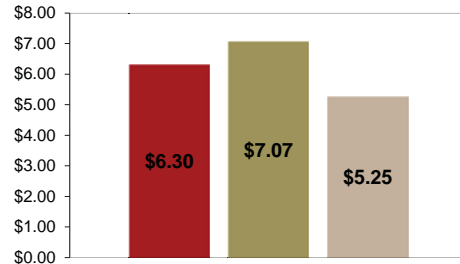
Total Advancement Expenditures



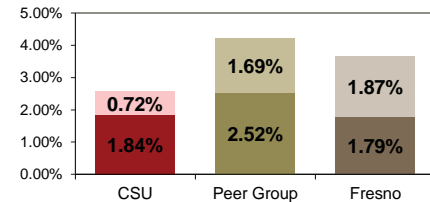
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

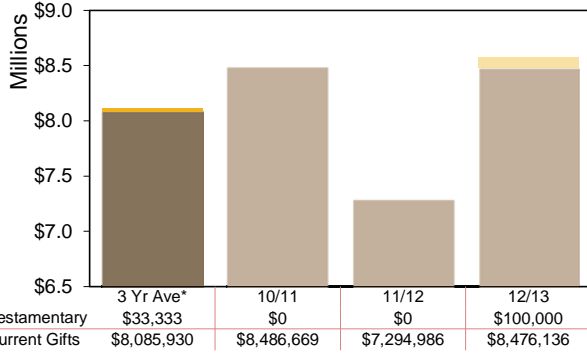
This academic year began with the arrival of Dr. Joseph I. Castro, the eighth president in the 103-year history of Fresno State, and the beginning of a new and exciting era at the University. Budget downturns had significantly reduced state and non-state support to Advancement. Our environmental scan could hardly ignore the long-term negative impacts of the economy on the university's ability to sustain its private fundraising efforts. And yet, volunteers and staff were able to meet the challenges and achieve a huge success. Fresno State completed its first comprehensive campaign and surpassed its \$200 million campaign goal by 7%, reaching \$214.2 million. One campaign highlight includes the largest cash gift in the history of the CSU, \$29.4 million. Monetary and non-monetary goals were achieved, including the creation of a culture of philanthropy on and off the campus. Volunteer leadership was very effective, and we are rejoicing at the successes of our volunteers and staff.

Campus: **Fullerton**
Peer Group: **2**

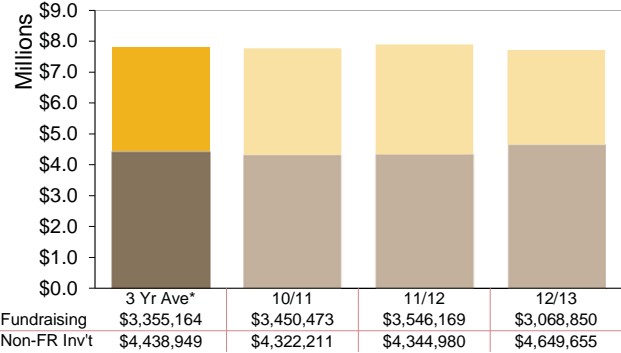
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

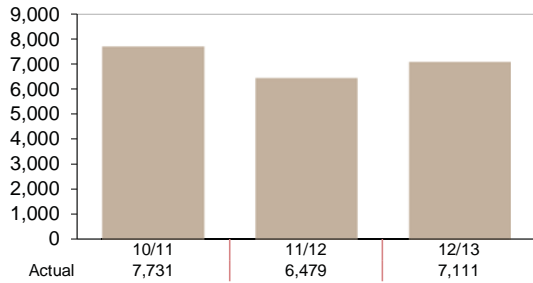
Gift Commitments



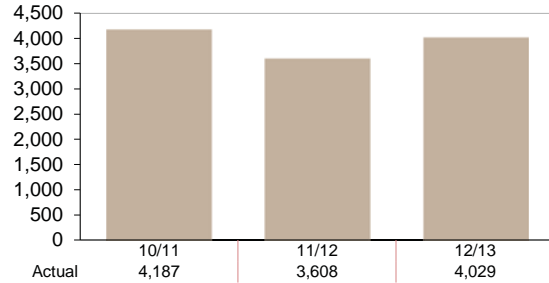
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



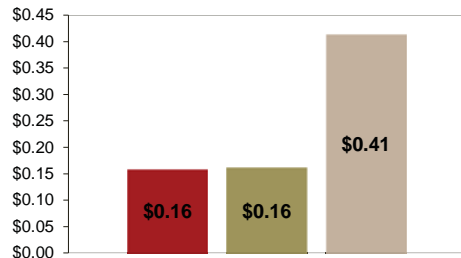
MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

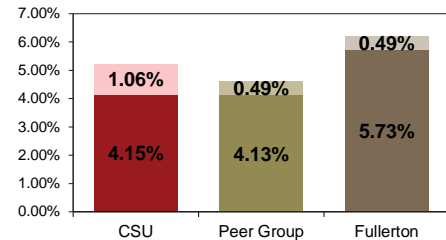
Investment as a Percentage of State General Fund

- CSU Average
- Peer Group Average
- Fullerton Average

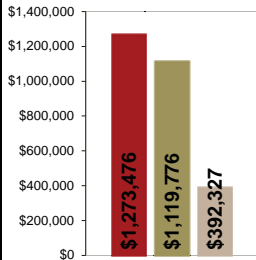
Cost to Raise a Dollar



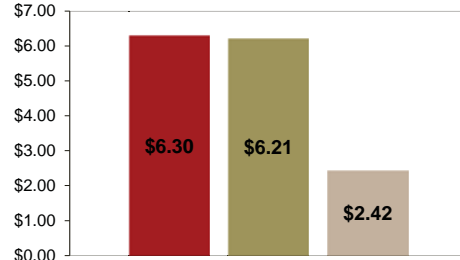
Total Advancement Expenditures



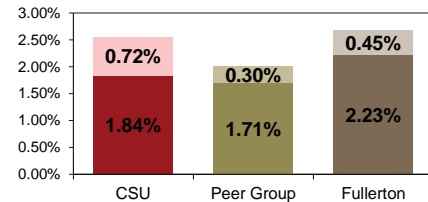
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

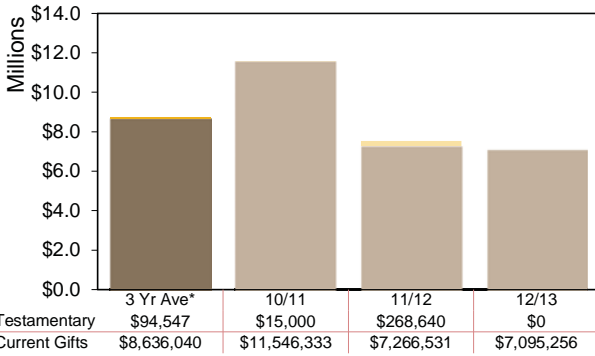
This is an exciting time in the life of Cal State Fullerton. Under the leadership of President Mildred Garcia and with extensive campus input, in Spring of 2013 Cal State Fullerton completed its first strategic plan. It is focused on four key goals that will target workforce readiness, student success, enhancing our on-campus community, as well as growing and diversifying the revenue sources of the University. This strategic focus has propelled the campus, and specifically University Advancement (UA), in a positive direction. Through new leadership and initiatives, Cal State Fullerton anticipates a strong fundraising year and a reduction in the cost to raise a dollar in FY 2013-14, and for last fiscal year (2012-13) CSU Fullerton saw noteworthy gains in almost all functions of University Advancement. They include a 29% increase in gift receipts, 24% increase in our endowment, 10% increase in individual donors, and 59% in earned media coverage. At the same time, Cal State Fullerton has engaged all the county, state, and federal legislators in our service area. The momentum is continuing in FY 2013-14 with very strong fundraising, and a renewed focus on strategically positioning Cal State Fullerton for greater external investment, and enhancing our profile in Orange County and the greater southern California region.

Campus: **Humboldt**
 Peer Group: 1

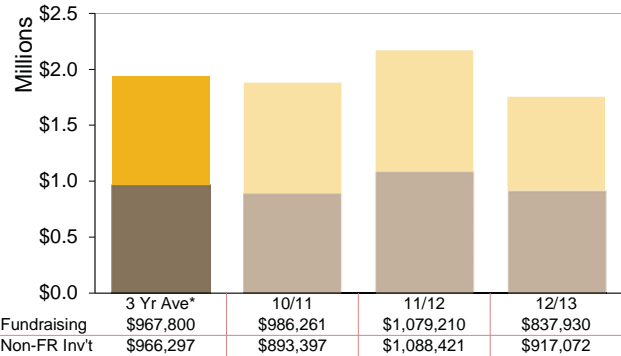
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

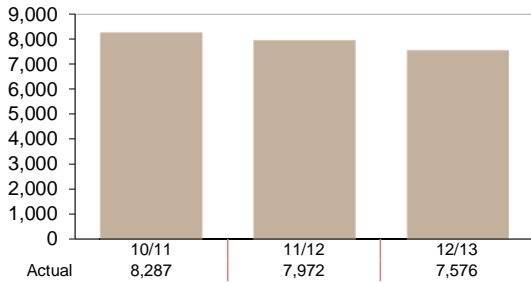
Gift Commitments



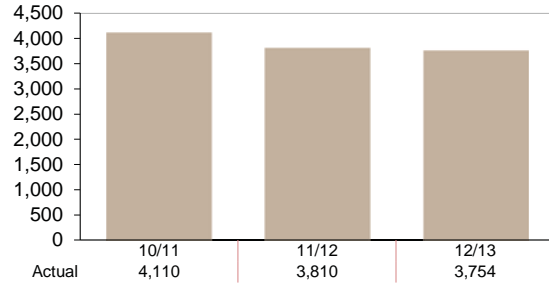
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



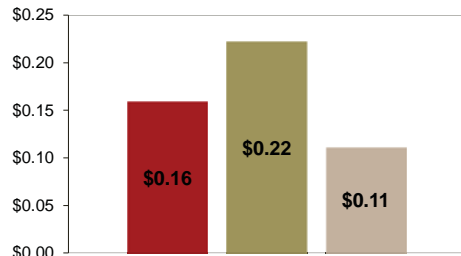
MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

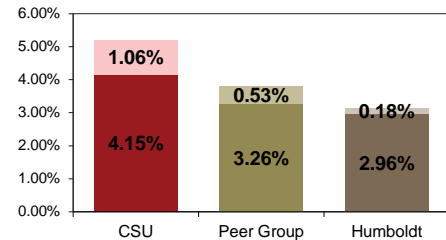
Investment as a Percentage of State General Fund

- CSU Average
- Peer Group Average
- Humboldt Average

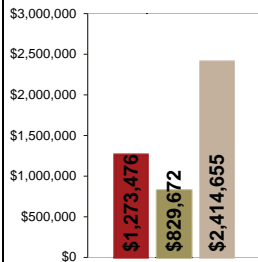
Cost to Raise a Dollar



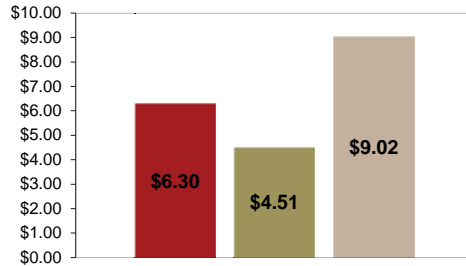
Total Advancement Expenditures



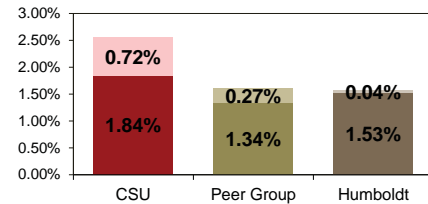
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

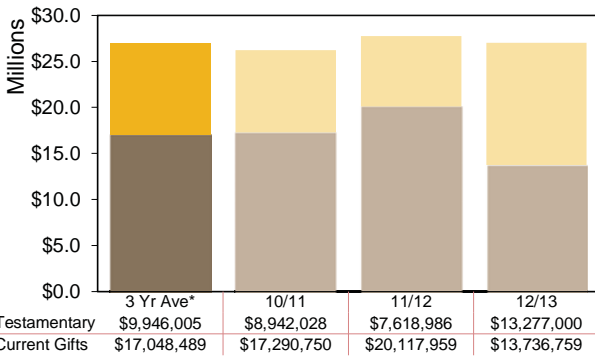
The purpose of Humboldt State University Advancement is to enhance the reputation and standing of the University, and to maximize voluntary support in ways that are fulfilling to contributors and that respond to the priority needs of the University in both the short term and the long term. Our vision is that all alumni, friends, campus partners, and others who care about the institution are engaged in meaningful relationships in support of Humboldt State University. This is a year of continued strengthening and staff building for Advancement as the University prepares for a presidential transition toward year-end. Staff reorganization has helped integrate assignments and tasks across the Division, with the objective of providing meaningful opportunities for lifelong engagement for Humboldt State's alumni and supporters, and ensuring that fundraising efforts are focused and productive. Humboldt State University Advancement encompasses five key initiatives on behalf of the University: Marketing and Communications, Alumni and Engagement, Development Office, KHSU-FM, and Humboldt State University Advancement Foundation.

Campus: **Long Beach**
Peer Group: **3**

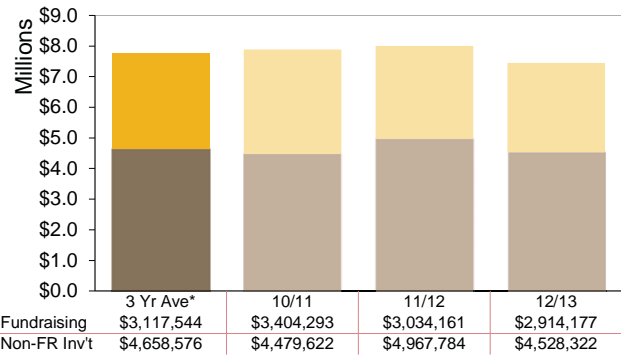
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

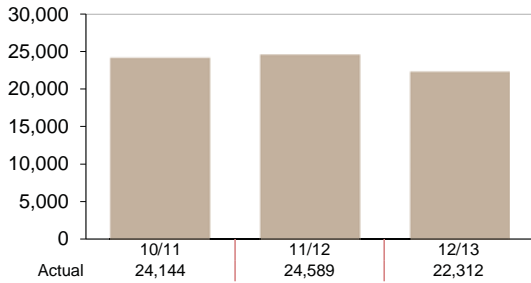
Gift Commitments



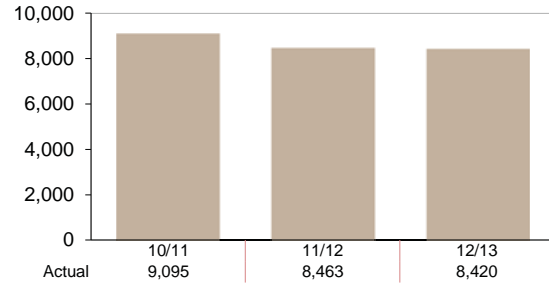
Total Advancement Investment



Number of Individual Donors



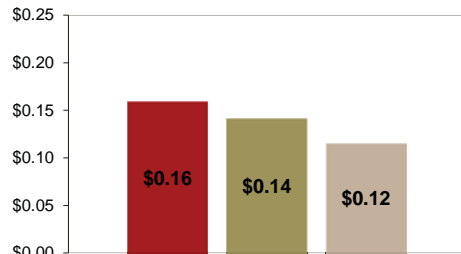
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

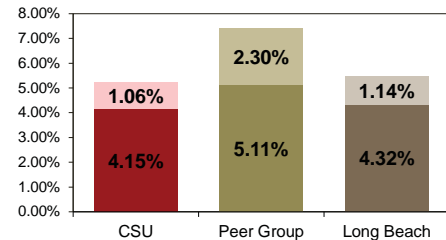
Cost Benefit Analysis

Cost to Raise a Dollar

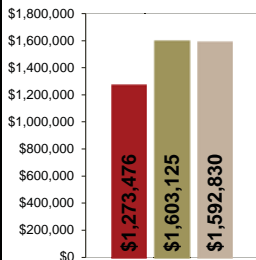


Investment as a Percentage of State General Fund

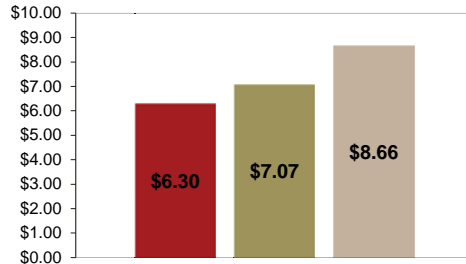
Total Advancement Expenditures



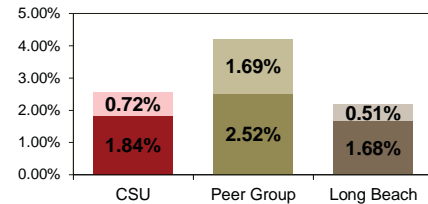
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

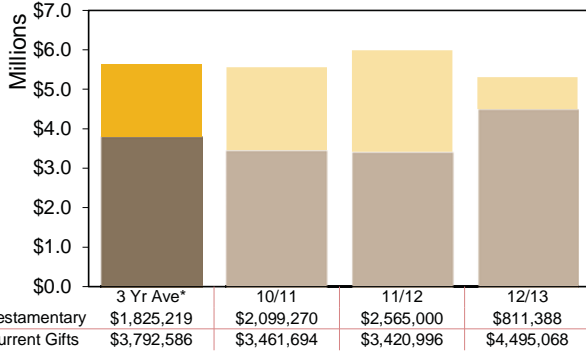
CSULB raised \$27 million in FY 2012-2013, consistent with the previous fiscal year. Notable gifts/pledges included a \$3 million pledge from Anna W. Ngai for the new alumni center, a \$170,000 gift from Dennis and Carol Berryman for the President's Scholars Program, and a \$130,000 gift from Glen and Debbie Bickerstaff and the Bickerstaff Family Foundation for the president's discretionary fund and the men's basketball program. The campus continued the quiet phase of its campaign, raising \$171.6 million by the end of the fiscal year. The campus is ready for the campaign's public launch but will wait until a permanent president is named to make this announcement. The CSULB 49er Foundation completed its first full year of operation; it also conducted its first audit and produced its first annual report. Additionally, an ad hoc campaign committee was formed to help establish connections and raise money in preparation for the public phase of the comprehensive campaign. In March 2013, President Alexander announced his resignation after being named president and chancellor of Louisiana State University. Donald Para, CSULB provost, was named interim president of CSULB, and a search for a permanent president is underway.

Campus: **Los Angeles**
Peer Group: 1

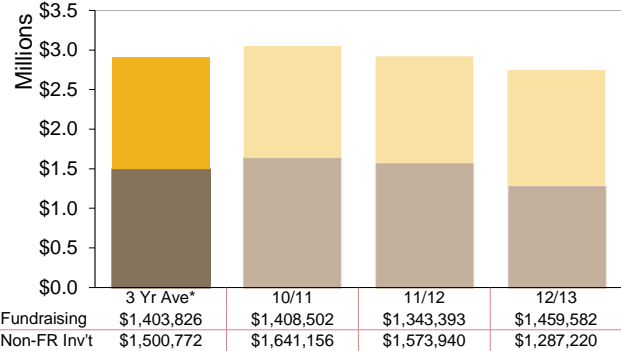
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

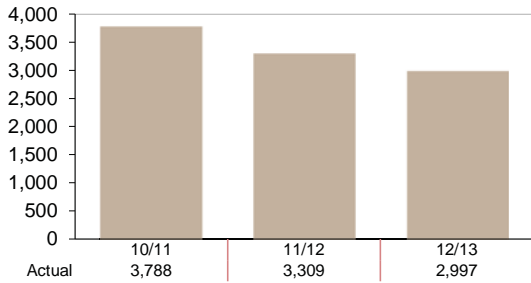
Gift Commitments



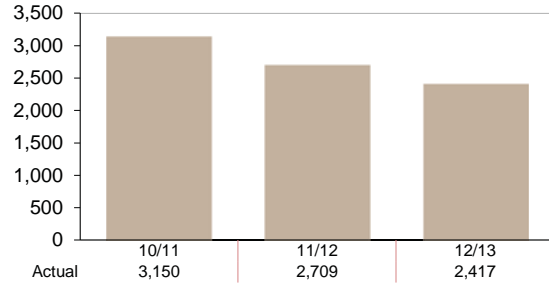
Total Advancement Investment



Number of Individual Donors



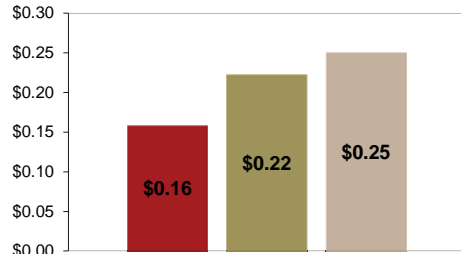
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

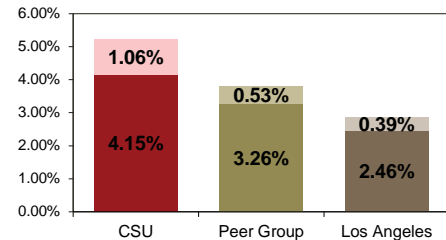
Cost Benefit Analysis

Cost to Raise a Dollar

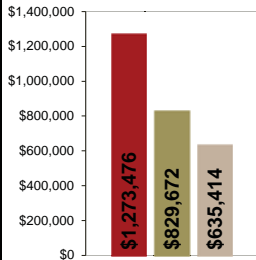


Investment as a Percentage of State General Fund

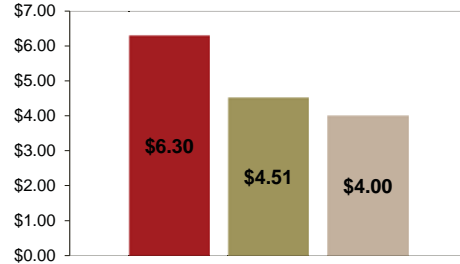
Total Advancement Expenditures



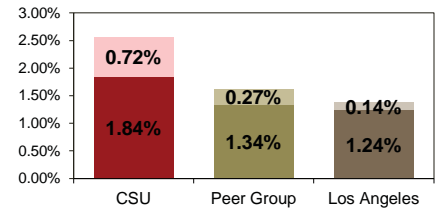
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

In September Cal State L.A.'s seventh President, Dr. William A. Covino, was joined at the University Convocation by Mayor Eric Garcetti and Congresswoman Judy Chu. These special guests provided opening remarks that welcomed the new President to the campus and to the City of Los Angeles. This new format for opening the academic year epitomized the many new changes and transitions that were ahead for the Division and the entire campus.

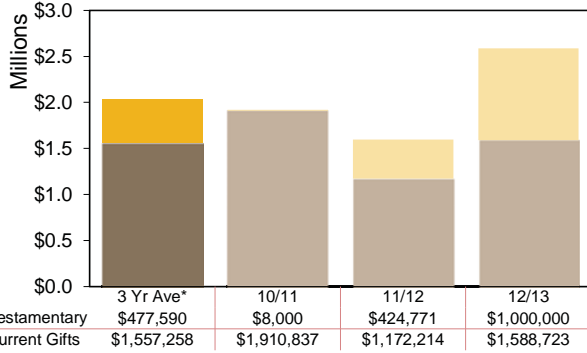
Several staff departures, including the Vice President for Institutional Advancement, coincided with the start of the academic year. A national search for a new Vice President for University Advancement (formerly Institutional Advancement) has begun. Presently, the division and the Office of Public Affairs report to the newly appointed Chief of Staff and Vice President for Engagement and Economic Development in the Office of the President. Additionally, a consultant from Fresno State has been engaged to provide assistance during this period of transition. The remaining staff and managers continue to work with alumni, donors and friends to steward relationships, while preparing for the May 9th Presidential Investiture and related festivities. In spite of staff shortages, fundraising efforts have not stalled, as this is one of President Covino's top priorities. He is committed to moving the campus from a Tier I to a Tier II institution, and to prepare the campus for a major fundraising campaign to be launched in the next few years.

Campus: **Maritime Academy**
Peer Group: **1**

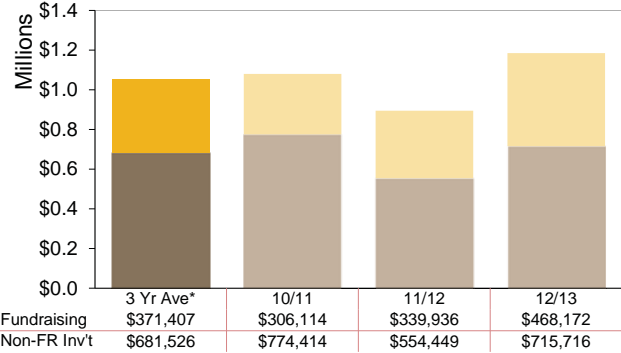
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

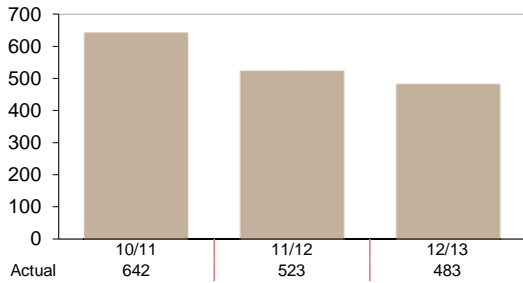
Gift Commitments



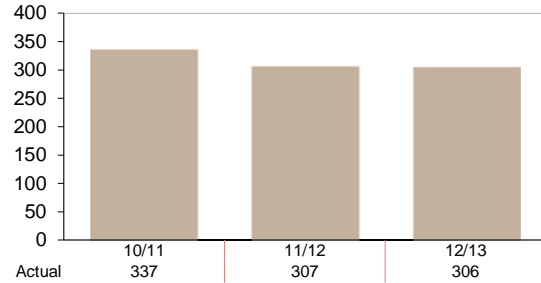
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



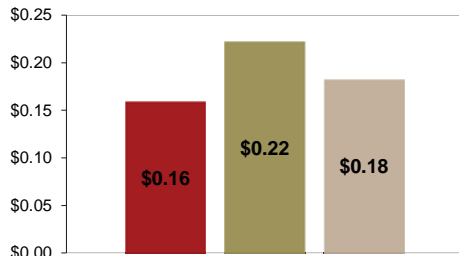
MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

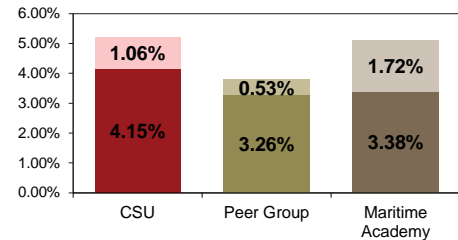
Investment as a Percentage of State General Fund

■ CSU Average
■ Peer Group Average
■ Maritime Academy Average

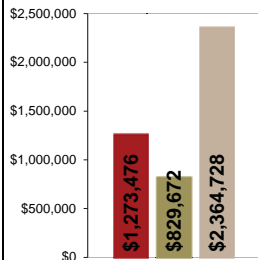
Cost to Raise a Dollar



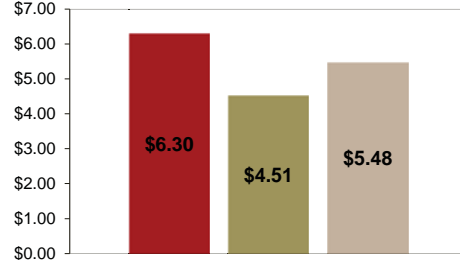
Total Advancement Expenditures



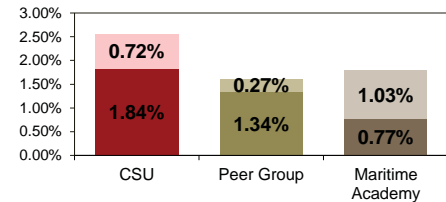
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

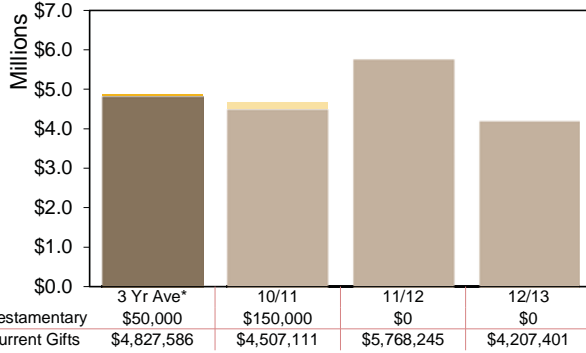
The 2013 year saw significant changes for University Advancement at Cal Maritime. Staff changes created challenges and new opportunities. Investments in the areas of public affairs and communications have resulted in a revitalized web and social media presence with opportunities for greater progress in the coming year. Greater focus on institutional branding and media outreach has begun in an effort to tie the Cal Maritime brand more closely with the CSU. Two vacant positions and the pending addition of another staff member will result in further growth of university advancement at Cal Maritime. Cal Maritime's first seven figure bequest signaled a new emphasis on planned gifts among our alumni. Other gifts have created Cal Maritime's first two distinguished professorships with a commitment by donors to giving faculty members the opportunity to advance, develop and learn. Additional endowment investments by donors have resulted in scholarships and a first time donor commitment to a major education program. Late in the year, a renewed focus was put on the university's annual giving program. A first-time solicitation on campus of faculty, staff, and students, coupled with an end-of-year mailing resulted in many first-time donors. Partnerships with industry on research and training projects provide new opportunities for external support for Cal Maritime. These partnerships are epitomized by collaboration with Chevron in the establishment of a Maritime Safety and Security Center. Additionally, new construction projects on campus will provide other opportunities for external support.

Campus: **Monterey Bay**
Peer Group: **1**

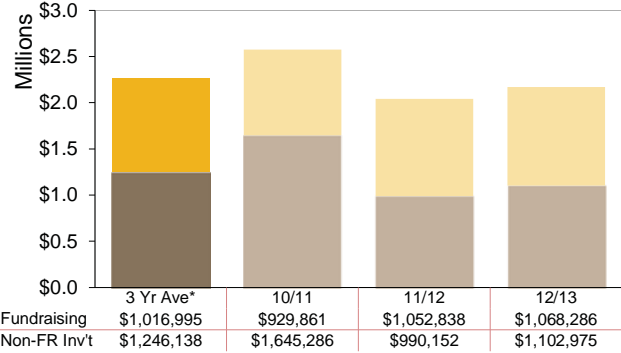
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

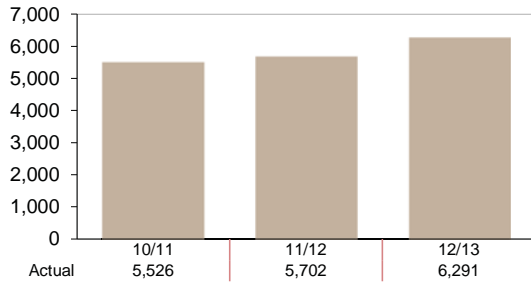
Gift Commitments



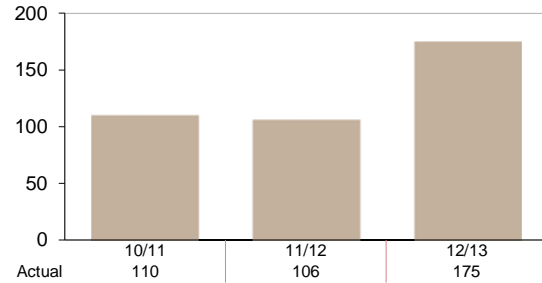
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



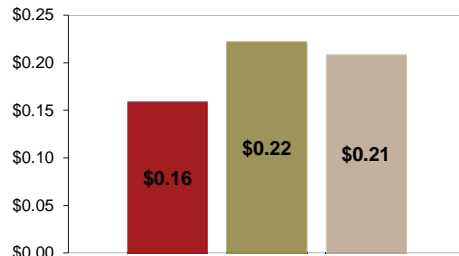
MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

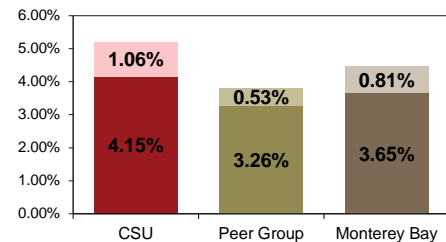
Investment as a Percentage of State General Fund

- CSU Average
- Peer Group Average
- Monterey Bay Average

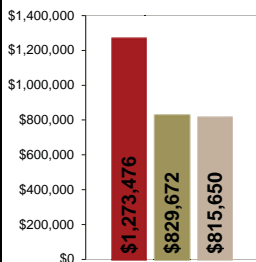
Cost to Raise a Dollar



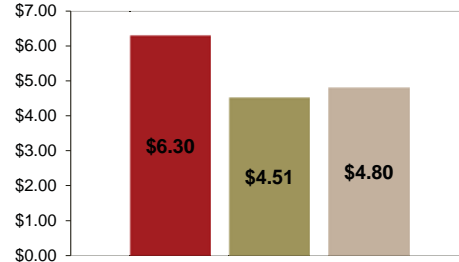
Total Advancement Expenditures



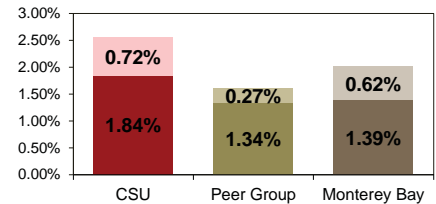
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

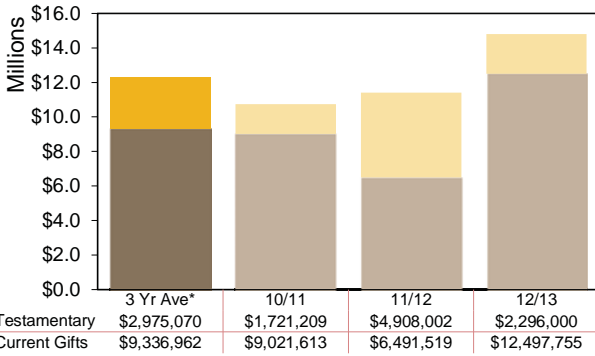
Total fundraising for FY 12-13 exceeded goals by 6.5%. Corporations and Foundations continue to represent the largest constituent, representing over 50% of all giving. Our goals for FY 14-15 will be to continue to implement our current goals as updated below. In addition, we need to manage the impact of significant changes in leadership and priorities at the campus. We have a new President as of May 2013, an interim provost, and a new College of Business with a new dean. There was also a change and reorganization in University Advancement with the appointment of a new Vice President for University Development and the reassignment of External Relations and Communications to a new Associate Vice President who reports directly to the President. Leadership change requires renewing the relationships with the community of donors including alumni, government partners, individuals, businesses and foundations. One key focus is on increasing and maintaining engagement. Priority changes include an expanded community partnership with nonprofits via commitment to the STRIVE network, collaboration with regional planning groups, refocusing building campaign fundraising with a new case for support under the new Dean of Business and reconstituting the Foundation Board with new members and purpose. CSUMB has also been given approval by the Chancellors' office to expand our enrollment, with a projected growth of @8% annually. New faculty will be recruited, discussions of establishing new colleges are underway and the capital master plan will need to keep pace with expansion.

Campus: **Northridge**
Peer Group: **2**

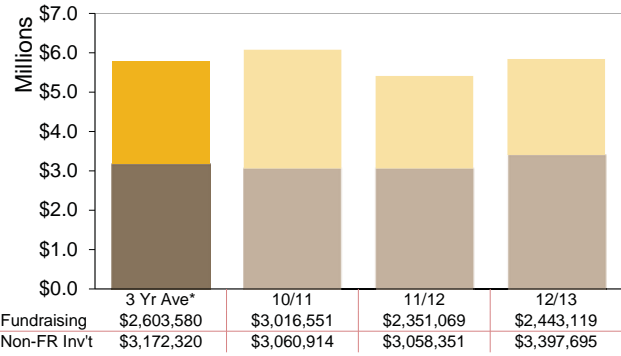
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

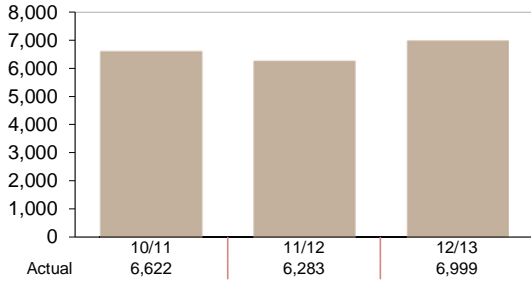
Gift Commitments



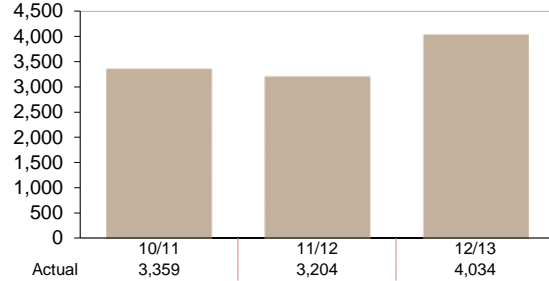
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



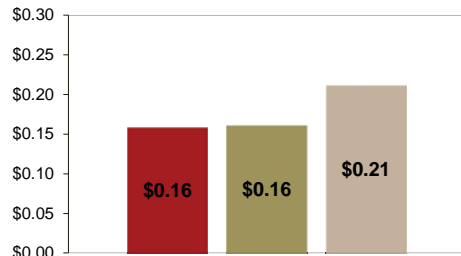
MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

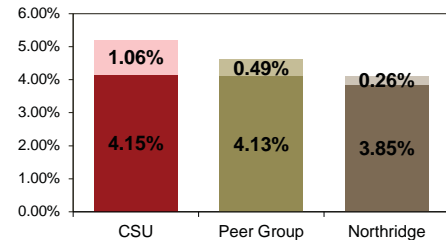
Investment as a Percentage of State General Fund

- CSU Average
- Peer Group Average
- Northridge Average

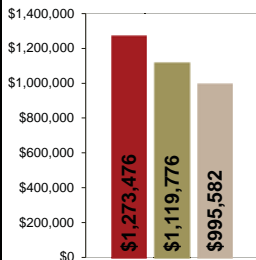
Cost to Raise a Dollar



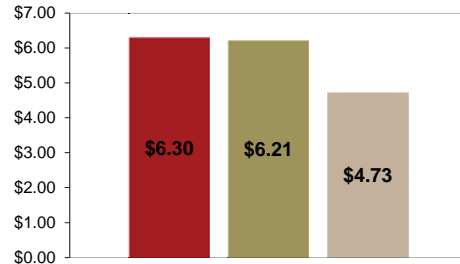
Total Advancement Expenditures



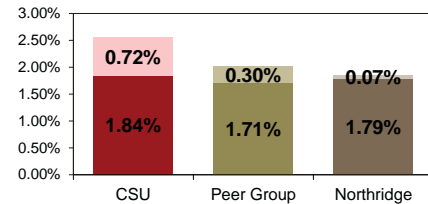
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

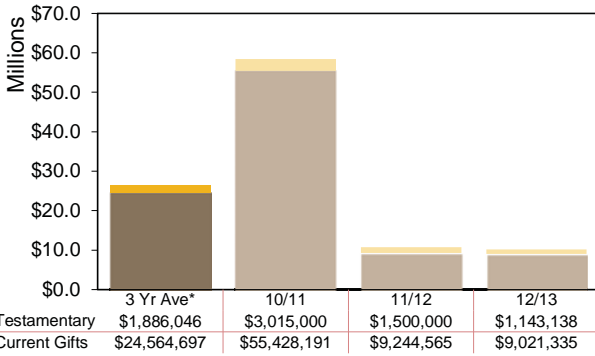
The momentum President Dianne F. Harrison brought to CSUN with her arrival last year was bolstered when she hired Dr. Robert D. Gunsalus as Vice President for Advancement in July 2013. Last year there was growth in philanthropic support, with a total of \$14.8 million, a five-year high. Net assets in the Foundation climbed from \$96.3 million to \$110.2 million, and the endowment grew from \$55 million to \$63 million. President Harrison was formally invested as president of CSUN on May 17, 2013. University Advancement was charged with orchestrating all aspects of the investiture and utilized the occasion to highlight student, faculty and staff achievements. Momentum continued and President Harrison delivered her second annual convocation address in August, sharing her seven priorities: Student success; Focus on employees for success; Visibility and reputation of the university; Plan for a future less dependent on state funding; Increase research activity and sponsored programs; Sustainability; Using athletics as a tool for engagement. Through Vice President Gunsalus' leadership the 2013-14 University Advancement Operating Priorities were established to guide activities. This planning process will be an annual routine with mid-year assessments. A comprehensive set of outcomes metrics has been established to help assess progress and improve strategies going forward.

Campus: **Pomona**
Peer Group: **2**

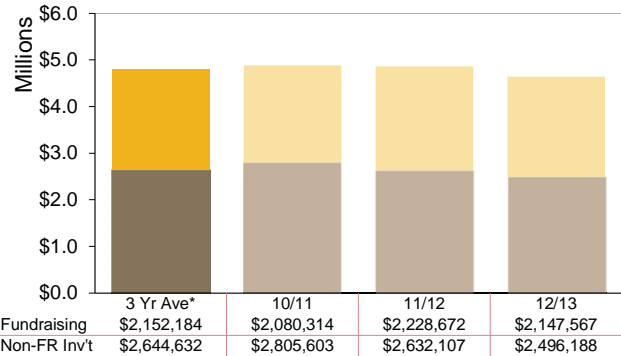
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

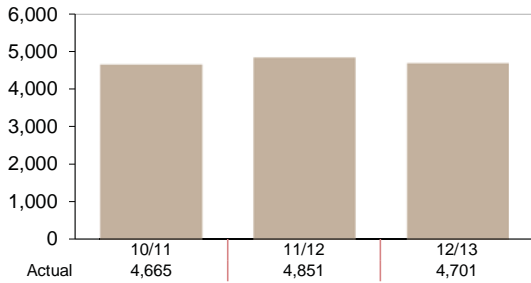
Gift Commitments



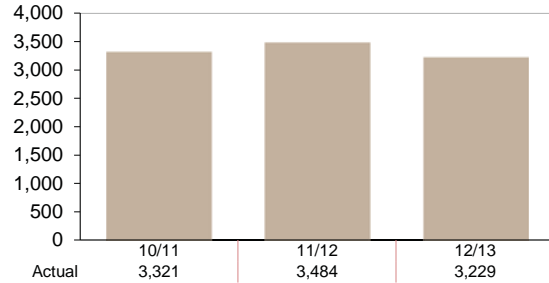
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



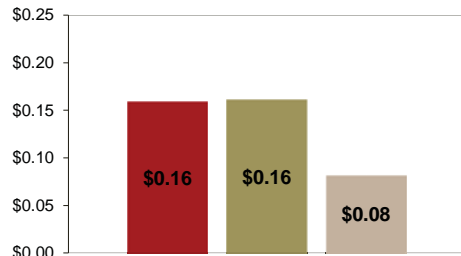
MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

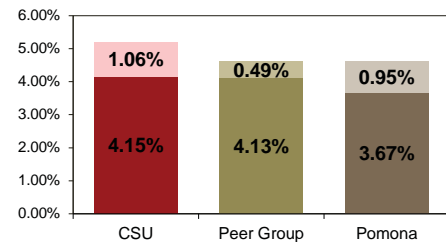
Investment as a Percentage of State General Fund

- CSU Average
- Peer Group Average
- Pomona Average

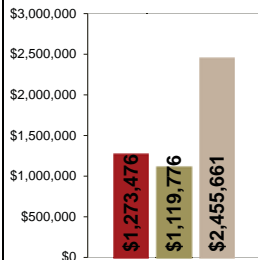
Cost to Raise a Dollar



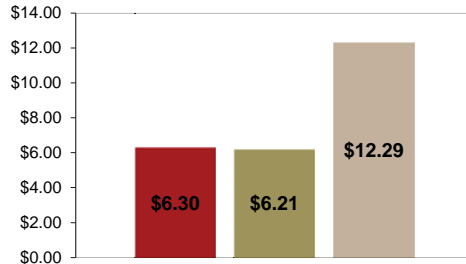
Total Advancement Expenditures



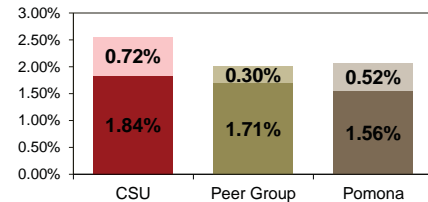
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

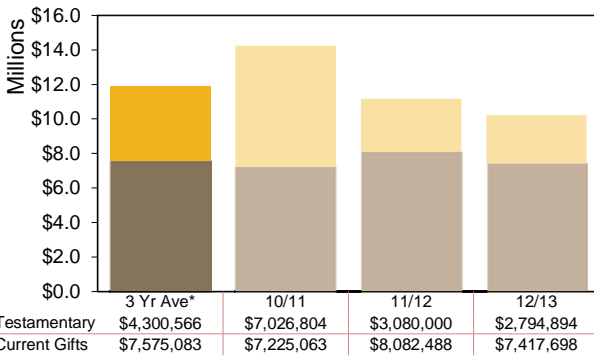
Cal Poly Pomona is in the final months of its six-year comprehensive campaign quietly launched in July, 2008. As of December 15, 2013, \$130,995,145 has been raised toward the \$150 million goal. The campaign has been highly successful and fast-tracked, resulting in a significant donor-pipeline that has been developed, particularly over the last two years. Already we look toward post-campaign plans to maintain major-gift momentum and to address some campaign project priorities that will not be fully recognized by campaign-end. During the course of the campaign, three-year fundraising averages grew from \$6.5 million at the end of fiscal year 2007 to \$28.1 million at the end of fiscal year 2013. This increase occurred despite budget cuts and some lost University Advancement positions during the "Great Recession." Public Affairs has also been working collaboratively with the campus on a new university website, the digital gateway to the campus. The web site takes on a new philosophy. Previously, disparate groups developed materials across campus, this new web approach provide a more unified approach to ensure the site is easy to navigate for new users and the university brand is more cohesive.

Campus: **Sacramento**
Peer Group: 2

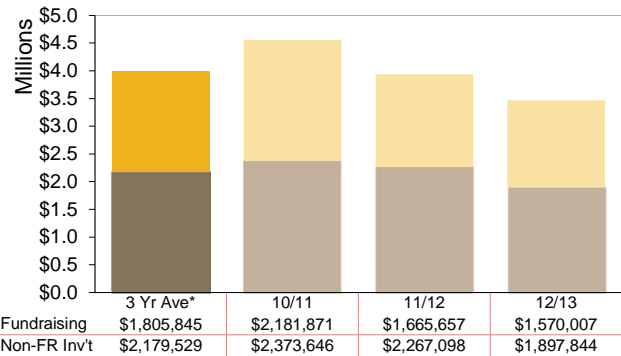
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

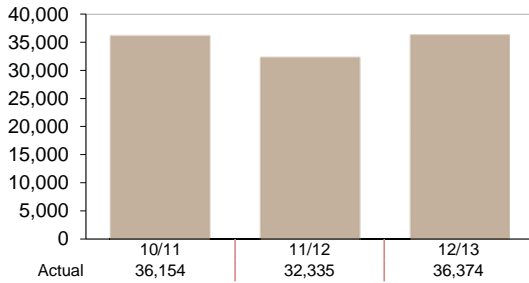
Gift Commitments



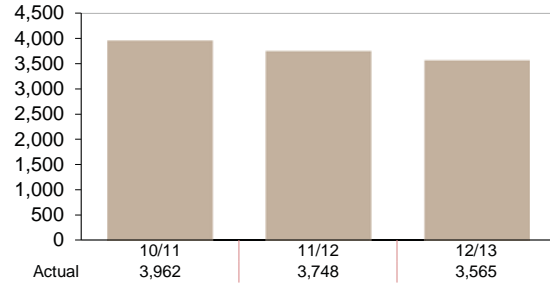
Total Advancement Investment



Number of Individual Donors



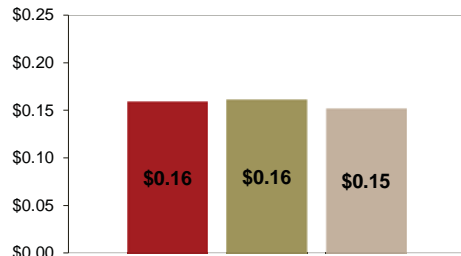
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

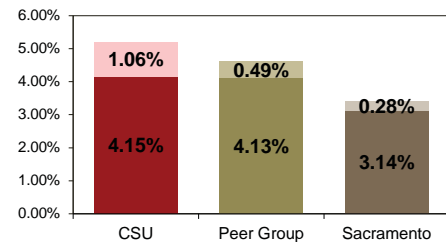
Cost Benefit Analysis

Cost to Raise a Dollar

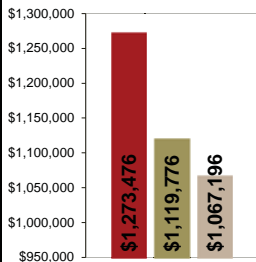


Investment as a Percentage of State General Fund

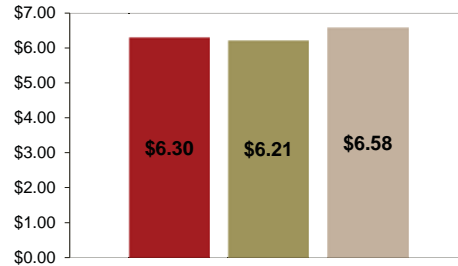
Total Advancement Expenditures



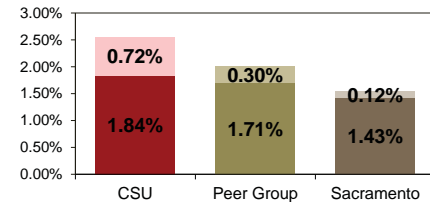
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

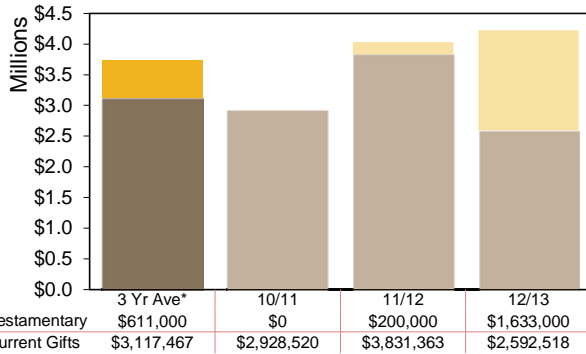
Sacramento State's academic and student life programs are thriving under record applications, native freshmen and transfer students; regional and national program recognition for programs in business, veteran services, health care and public policy and administration; and the continuing visionary leadership of President Alexander Gonzalez that is celebrated throughout the Sacramento region. For the third year in a row, the University Foundation at Sacramento State's prudent management of a high-performing portfolio has offered positive returns, resulting in 5 percent payouts to student scholarships and campus programs. The Sacramento State Alumni Association has reached an unprecedented 7,000 members and the Annual Giving program raised more than \$55,000, including a matching gift contribution by the University Foundation, during a 36-hour period on Giving Tuesday on Dec. 3. University Advancement is in the second phase of its long-range strategic plan in support of three key goals: (1) strengthen University Advancement team to enhance University priorities; (2) identify, create and enhance relationships with alumni, donors and friends to strengthen their connection with and support for the University; and (3) actively connect with the academic enterprise to better serve our students. In 2014-2015, University Advancement continues to enhance its four measurable objectives to position the division for greater alumni engagement and philanthropy from donors.

Campus: **San Bernardino**
Peer Group: 1

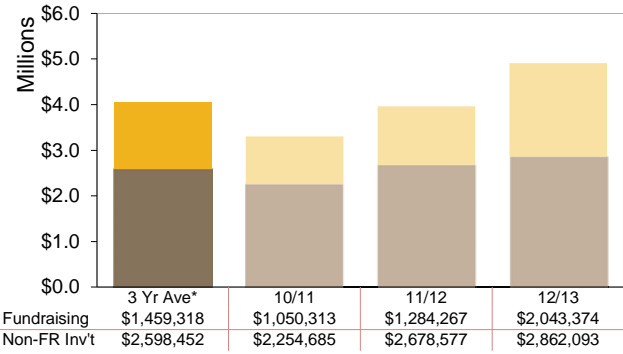
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

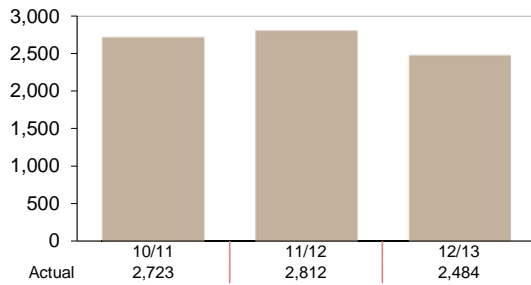
Gift Commitments



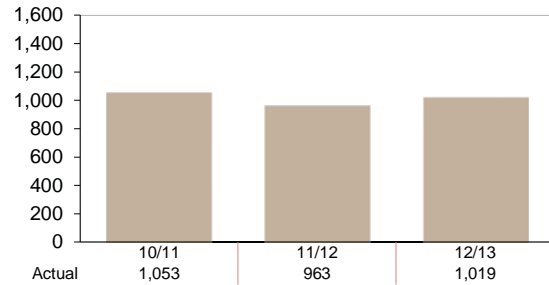
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



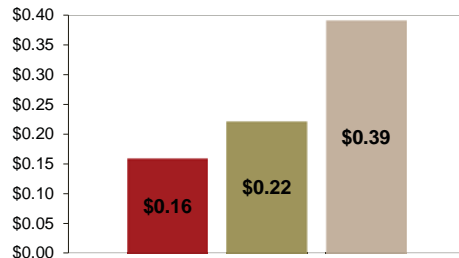
MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

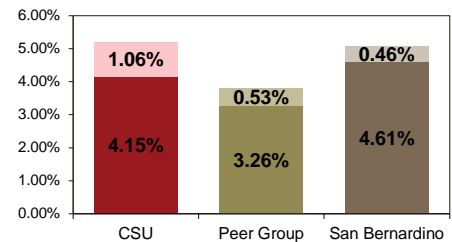
Investment as a Percentage of State General Fund

- CSU Average
- Peer Group Average
- San Bernardino Average

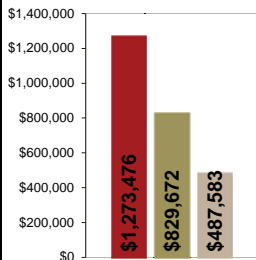
Cost to Raise a Dollar



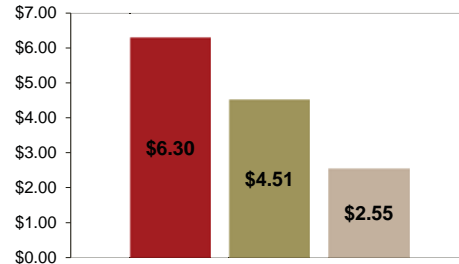
Total Advancement Expenditures



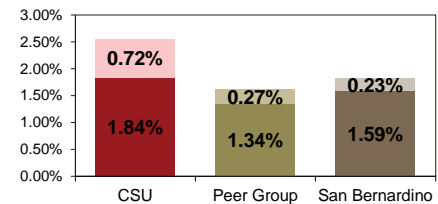
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

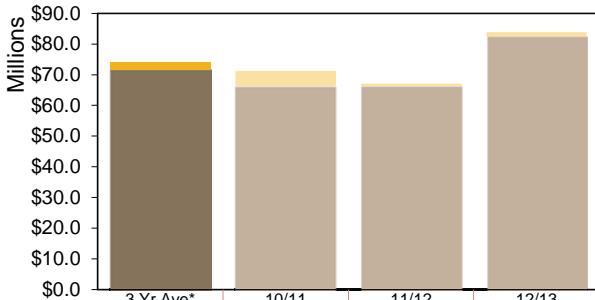
An unprecedented year of transition for CSUSB's Division of University Advancement. The division began a comprehensive reorganization under first-year vice president Ron Fremont, resulting in the centralization of all development officer salary lines and management, new positions and successful searches to support prospect management/research as well as corporate & foundation relations, new lines for a part-time major gift officer at the Palm Desert Campus, and successful searches to fill a new director of alumni affairs (Doreen Hatcher) and the AVP for development (Beth Brenner) in October. Gaps still remain, especially in the area of communication and filling development officer positions. The campus struggled last year to identify stellar candidates in the College of Business and Public Administration and the College of Arts and Letters. As of December 2013, three colleges did not have sitting development officers.

Campus: **San Diego**
Peer Group: **3**

*Three Year Average: 10/11 11/12 12/13

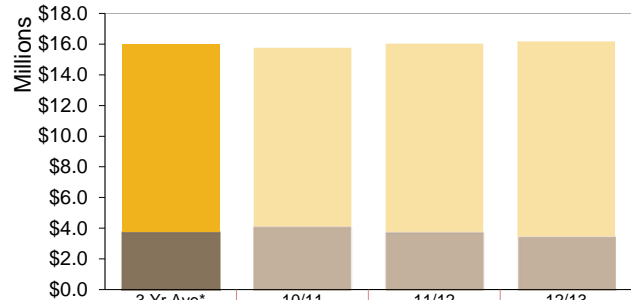
GOAL MATRIX DASHBOARD

Gift Commitments



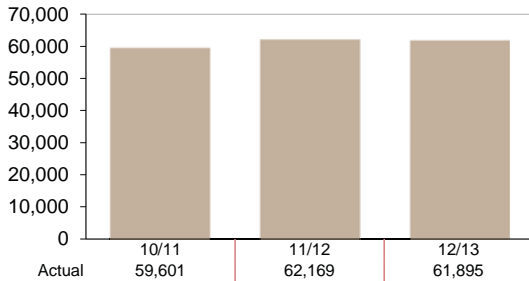
| Category | 3 Yr Ave* | 10/11 | 11/12 | 12/13 |
|---------------|--------------|--------------|--------------|--------------|
| Testamentary | \$2,358,594 | \$4,934,958 | \$705,140 | \$1,435,684 |
| Current Gifts | \$71,696,262 | \$66,267,755 | \$66,347,216 | \$82,473,815 |

Total Advancement Investment

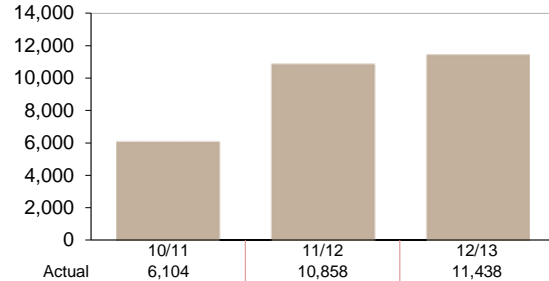


| Category | 3 Yr Ave* | 10/11 | 11/12 | 12/13 |
|--------------|--------------|--------------|--------------|--------------|
| Fundraising | \$12,194,298 | \$11,627,902 | \$12,261,890 | \$12,693,104 |
| Non-FR Inv't | \$3,791,078 | \$4,131,048 | \$3,759,751 | \$3,482,433 |

Number of Individual Donors



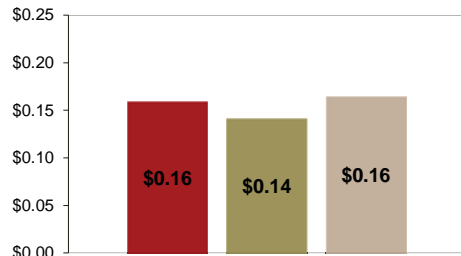
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

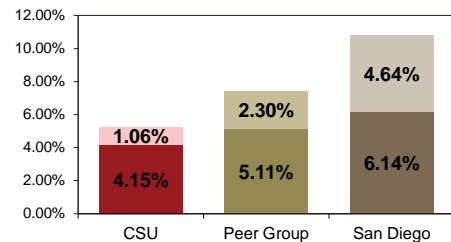
Cost Benefit Analysis

Cost to Raise a Dollar

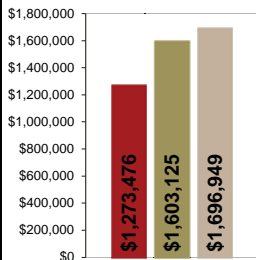


Investment as a Percentage of State General Fund

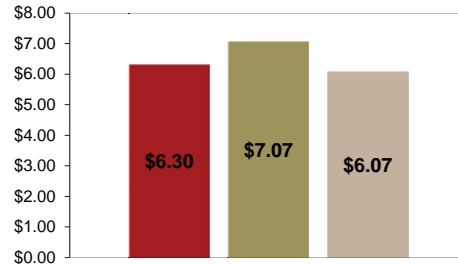
Total Advancement Expenditures



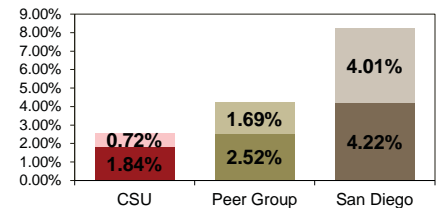
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

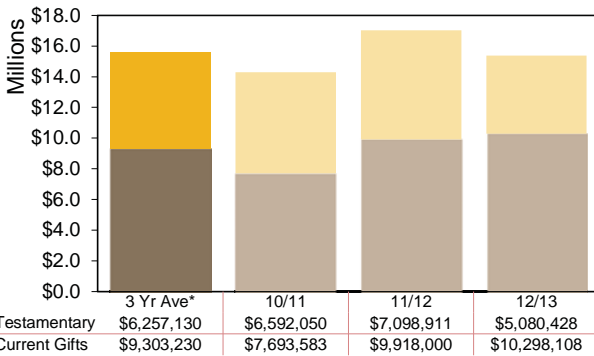
San Diego State University's donors continue to support the institution at historic levels. For the fiscal year that ended June 30, 2013, the Campanile Foundation, SDSU's philanthropic foundation, received \$83 million in cash and pledges and pledge payments. Launched in 2007, The Campaign for SDSU – SDSU's first comprehensive campaign – is nearing its \$500 million goal. As of December 2013, approximately \$465 million has been raised by the Campaign. With more than 61,000 individual donors, the Campaign is well on its way to a successful completion in 2014. Highlights from FY 2012-13 included \$3 million from Charles and Chinyeh Hostler to support international programs in the College of Arts and Letters; \$1.5 million from Campanile Foundation board member Terry Atkinson to establish an endowment to support faculty research; a \$1.5 million endowment from the late Professor Emeritus Donald G Wilson for the College of Engineering; \$1 million from the late Professor Emeritus Henry Janssen to the Honors College endowment; and, a \$250,000 gift from Union Bank to multiple programs including SDSU's Guardian Scholars program, which provides foster youth with a comprehensive, holistic support program to help them achieve the goal of a college degree. In 2012-13, SDSU raised nearly \$58 million for student scholarships, endowed professorships, and program support.

Campus: **San Francisco**
Peer Group: 2

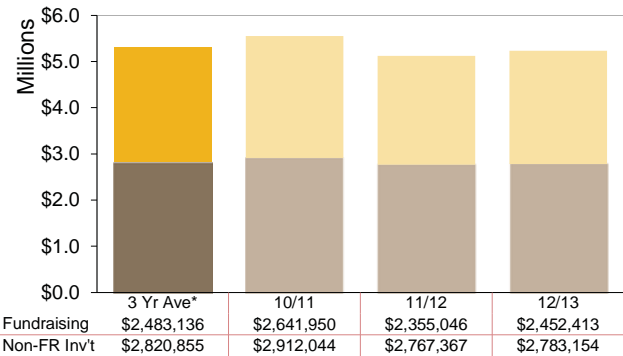
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

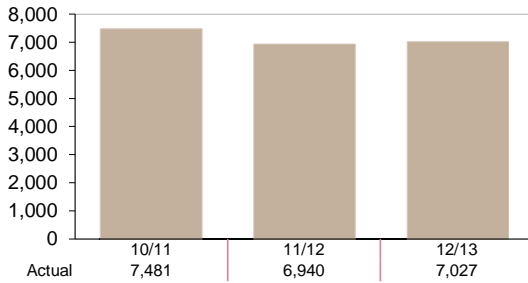
Gift Commitments



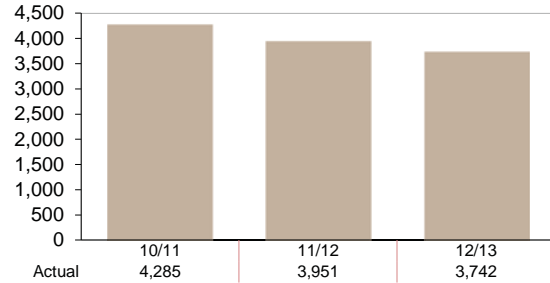
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors

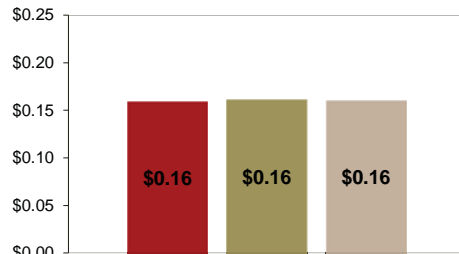


MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

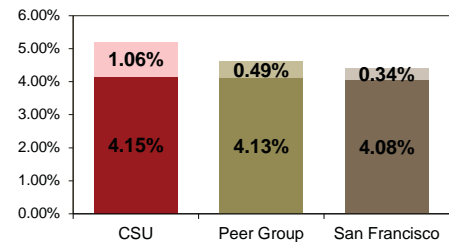
Cost to Raise a Dollar

- CSU Average
- Peer Group Average
- San Francisco Average

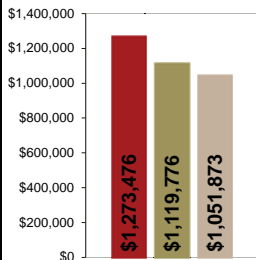


Investment as a Percentage of State General Fund

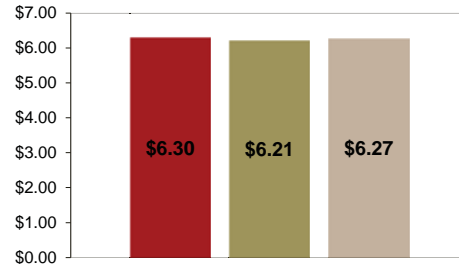
Total Advancement Expenditures



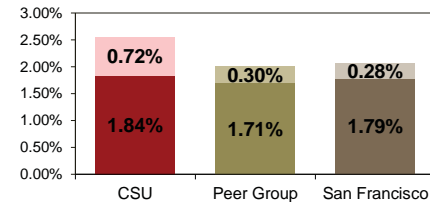
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

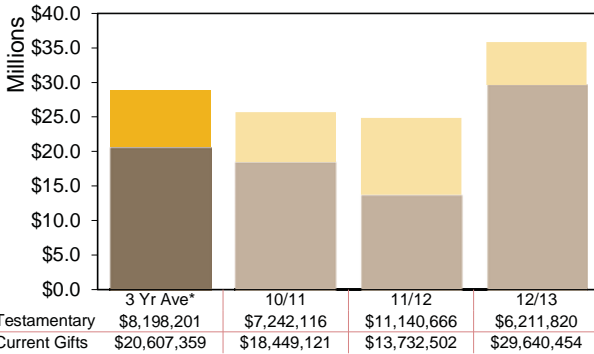
Founded in 1899, San Francisco State is approaching an extraordinary milestone – the prospective launch of the University's first comprehensive fundraising campaign in the spring of 2014. To prepare for this transformational undertaking, the University's Advancement team has successfully increased the level of coordination among its units to begin to expand capacity. First, with expressed confidence in Advancement, SF State's new president, now in office just over one year, has pledged 40% of his calendar to campaign-related activity. Further, based on a critical pre-campaign internal and external feasibility assessment by the consulting firm, Grenzebach Glier and Associates (GG+A), the president and provost are reviewing a new personnel plan and budget to expand Advancement staff across most units, especially Development. In addition, recognizing the importance of athletic activity in deepening alumni engagement and enriching campus life, itself a key factor in long-term alumni affinity, Athletics now reports to the Vice President of Advancement. The \$12M special campaign for student support, called "Students First," reached 100% of goal one year ahead of schedule, after being launched publicly last year. High quality collateral continues to be developed, mostly in-house, by the exceptional University Communications team, including several campaign-oriented pieces through unprecedented collegial coordination with Development. The Development Committee of the SF State Foundation Board stepped up its leadership role by establishing a 100% giving goal for the Board. Each of these committee members, along with several other board members, volunteered to host a pre-campaign Leadership Briefing for potential major donors.

Campus: **San José**
Peer Group: 3

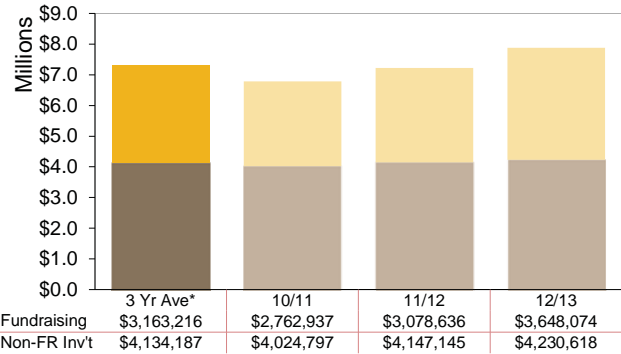
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

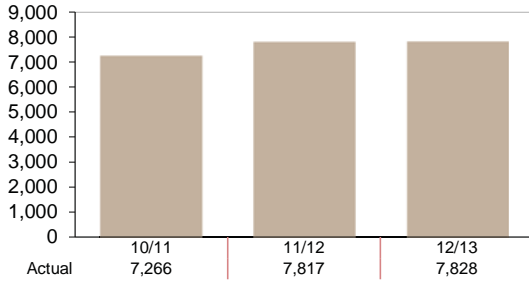
Gift Commitments



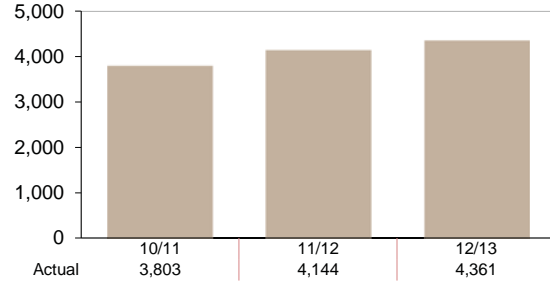
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



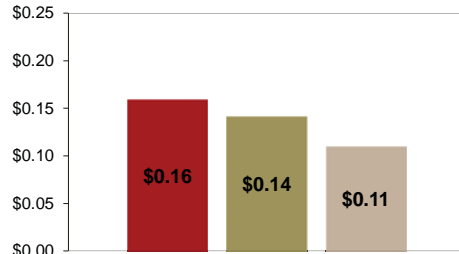
MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

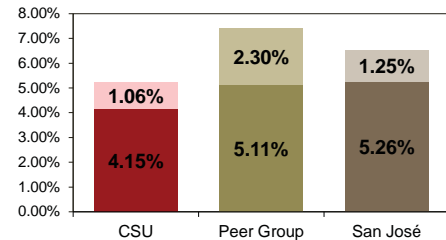
Investment as a Percentage of State General Fund

- CSU Average
- Peer Group Average
- San José Average

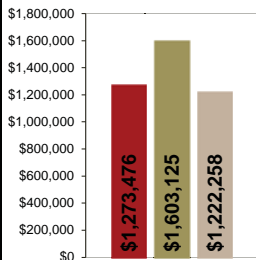
Cost to Raise a Dollar



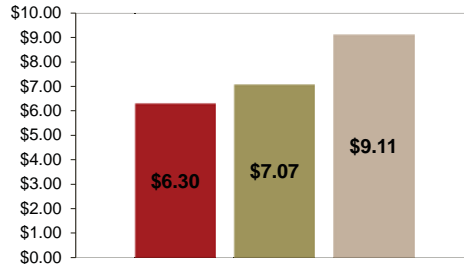
Total Advancement Expenditures



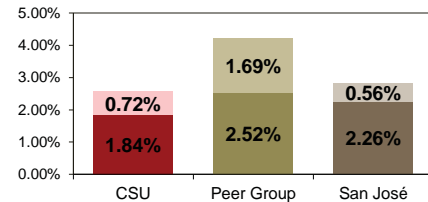
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

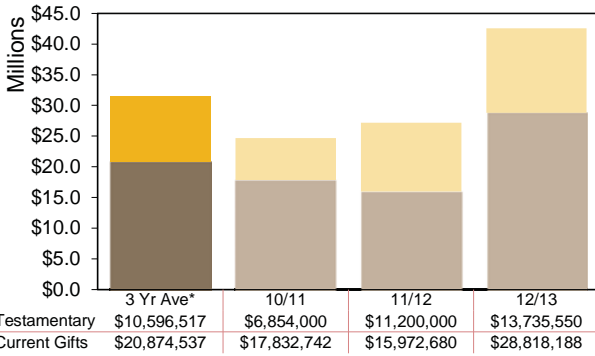
In June 2013, San José State completed successfully its first ever comprehensive campaign. Acceleration: The Campaign for San José State University raised almost \$209 million, well over the \$200 million goal. And, it was completed ahead of schedule, as we shaved a year off the public phase of the campaign at the request of President Mohammad Qayoumi. We are now in the planning phase of Campaign 2.0. The process includes assessing the organizational structure of Advancement to ensure resources are deployed as well as a feasibility study to ensure success in what will undoubtedly be a much larger campaign. As is typical at the conclusion of a campaign, we have experienced some attrition of fundraising staff and have begun an immediate search for new development officers. We are also adding to our research staff in anticipation of building the prospect pipeline for the next campaign.

Campus: **San Luis Obispo**
 Peer Group: 3

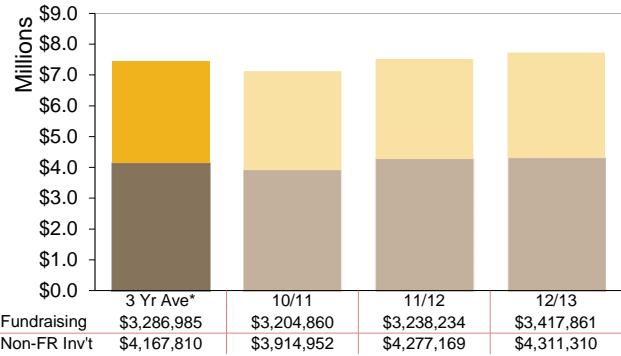
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

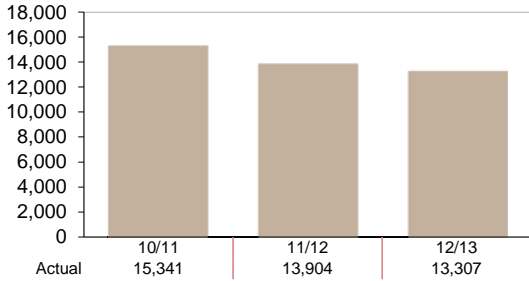
Gift Commitments



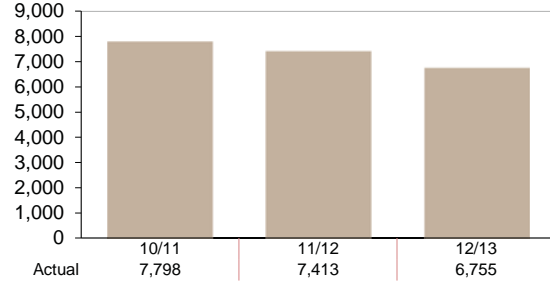
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



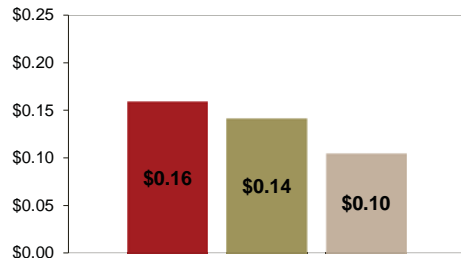
MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

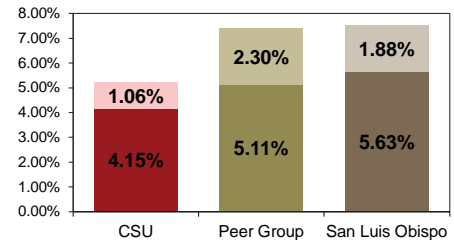
Investment as a Percentage of State General Fund

- CSU Average
- Peer Group Average
- San Luis Obispo Average

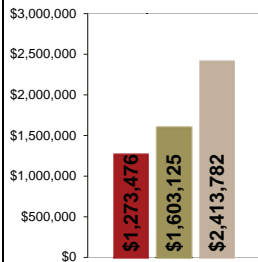
Cost to Raise a Dollar



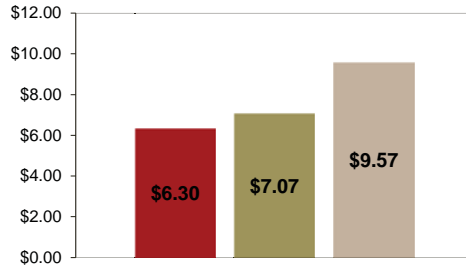
Total Advancement Expenditures



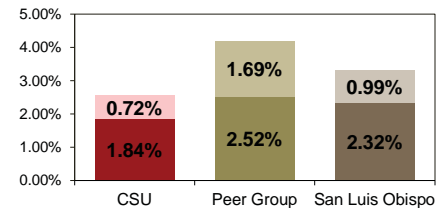
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

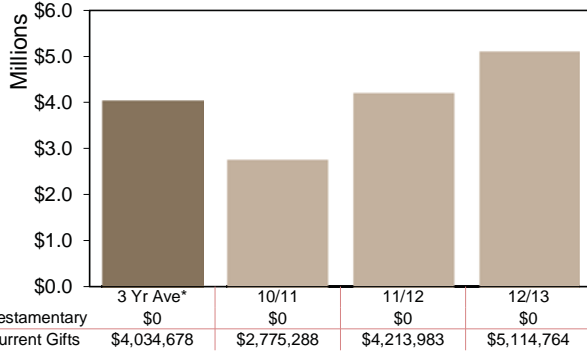
Cal Poly entered Fiscal Year 2013 by commencing campaign counting with the first year of a new comprehensive campaign's leadership phase. The University Advancement Division, under Vice President Deborah A.W. Read, surpassed its Year One campaign milestone of \$40 million. This fundraising achievement not only provided an encouraging start to the campaign, but it also represents the most productive fundraising year since the conclusion of Cal Poly's Centennial Campaign in 2004 (except for one year in which a \$60-million revocable bequest was documented). President Jeffrey D. Armstrong continued to build his leadership team during 2012-2013. This included a new Vice President for Student Affairs and new deans in the colleges of Architecture and Environmental Design and Liberal Arts while interim deans were appointed for the colleges of Agriculture, Food and Environmental Sciences and the Orfalea College of Business. Within University Advancement, Vice President Read made significant steps in establishing her team through the selection of an Associate Vice President for Development and filing a vacant Director of Government and Community Relations position; an experienced government relations officer from within the CSU was recruited into this position. Additionally, the Alumni Relations department was reconfigured to emphasize Alumni Outreach and Annual Giving and an interim Assistant Vice President was appointed to lead this unit. Finally, an interim Assistant Vice President was appointed to head the University's Marketing & Communications department.

Campus: **San Marcos**
Peer Group: **1**

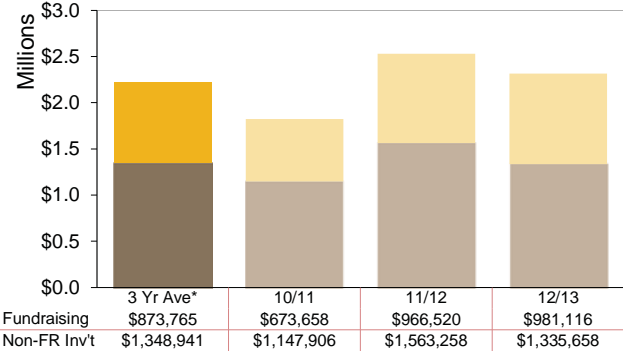
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

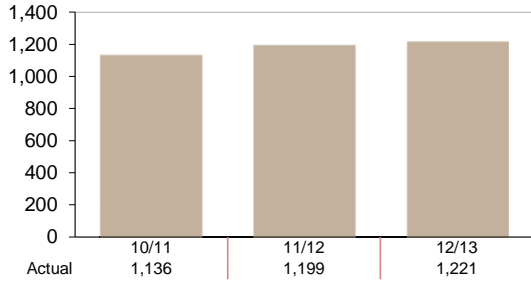
Gift Commitments



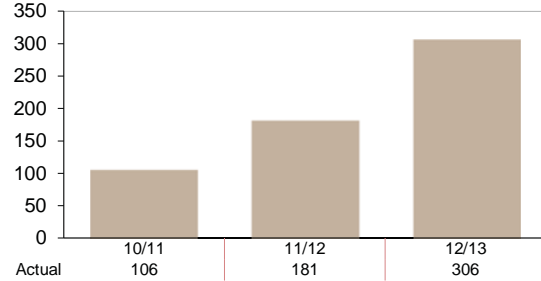
Total Advancement Investment



Number of Individual Donors



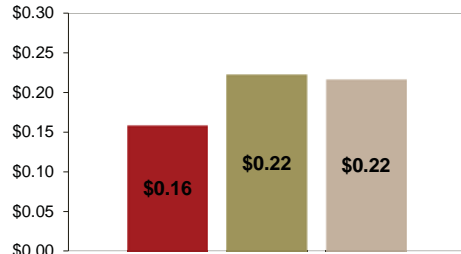
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

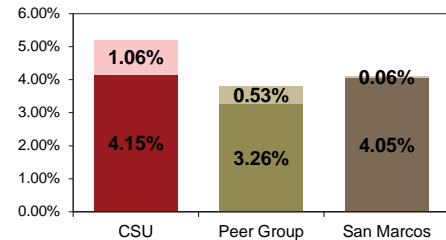
Cost Benefit Analysis

Cost to Raise a Dollar

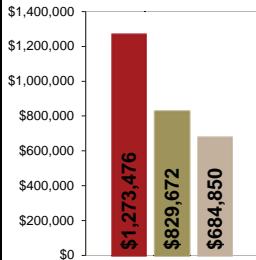


Investment as a Percentage of State General Fund

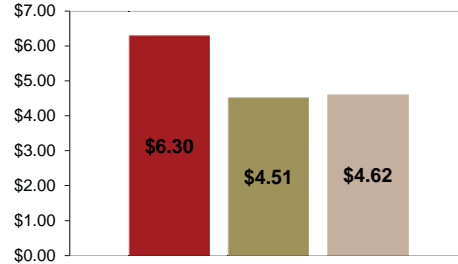
Total Advancement Expenditures



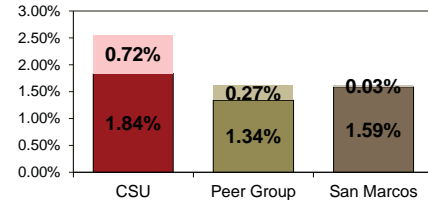
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

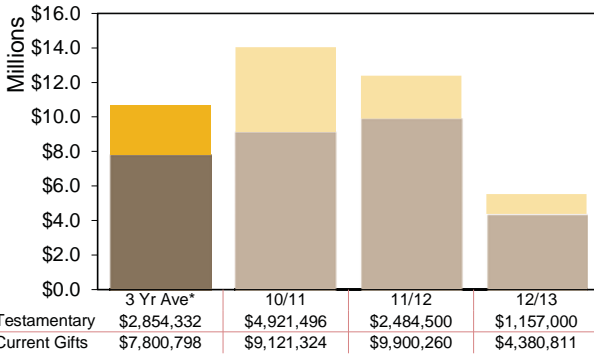
As California State University San Marcos prepares to launch its first comprehensive fundraising campaign, University Advancement has worked to ensure that its philanthropic agenda is closely aligned with University goals and priorities. In November, the campus celebrated the groundbreaking of its new Veterans Center, a gift from the Stevens Institute of Technology in New Jersey. The celebration included key community leaders and numerous elected officials or their representatives. Advancement played a crucial role in the success of this bi-coastal partnership and helped raise funds to support the costs of moving the building to campus and repurposing it to best support CSUSM's veteran and active-duty military population. In December 2013, CSUSM signed its eleventh guaranteed admission agreement with a local K-12 school district. This year University Advancement helped secure a \$555,000 three-year grant from the Price Family Charitable Fund to create a stronger, more integrated program that supports the districts, teachers and students through the newly established Alliance to Accelerate Excellence in Education. Since 2006, the Pardee Family has provided 50 scholarships a year to CSUSM students, totaling \$700,000. This year the Pardees took their generosity a step further and contributed an additional \$1.5 million to establish the J. Douglas and Marian R. Pardee Endowment in support of CSUSM's students. The CSU Institute of Palliative Care celebrated its one year anniversary at CSUSM in September. Advancement is working with IPC to expand and replicate the model into other universities across California and the U.S.

Campus: **Sonoma**
Peer Group: **2**

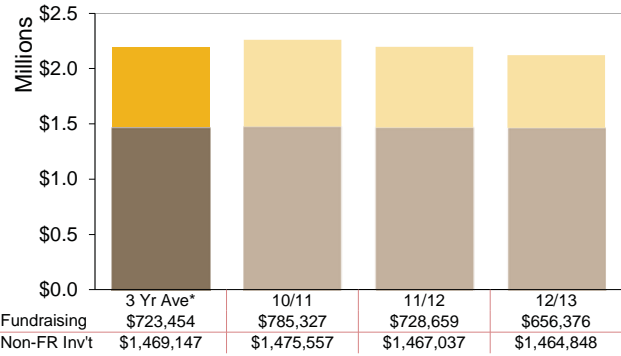
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

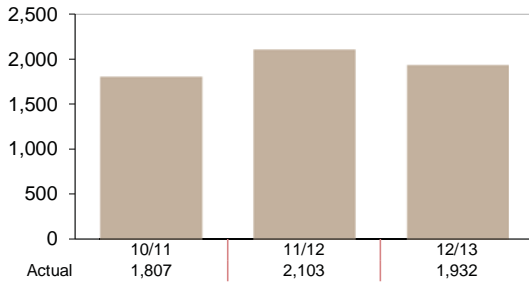
Gift Commitments



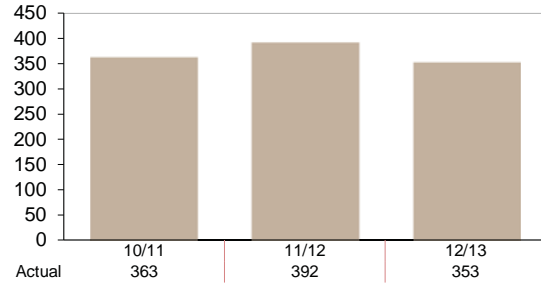
Total Advancement Investment



Number of Individual Donors



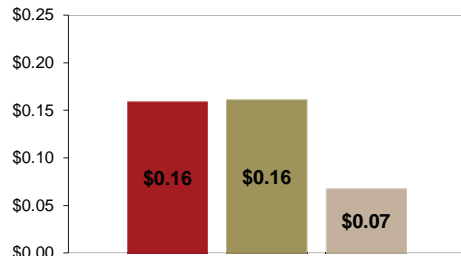
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

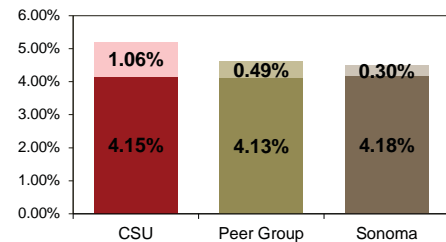
Cost Benefit Analysis

Cost to Raise a Dollar

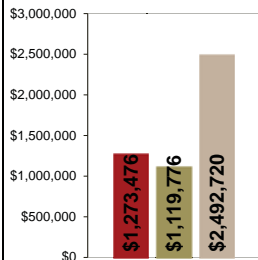


Investment as a Percentage of State General Fund

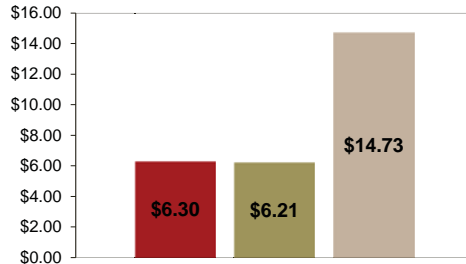
Total Advancement Expenditures



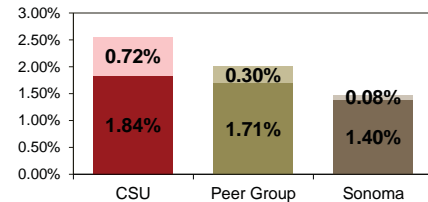
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

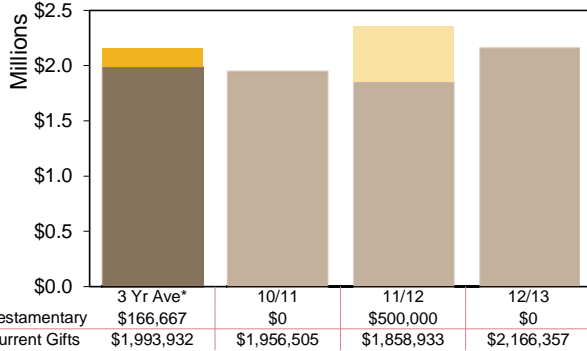
Sonoma State University's Advancement function crosses three divisions: University Affairs, University Development, and Accounting and Finance. The University Affairs Division includes communications, marketing, media relations, special events, website design and management, government affairs and community relations and has a staff of eight. University Development includes major gifts, annual giving, alumni relations and the Alumni Association as well as the University's Scholarship Coordinator. The Office of Accounting and Finance handles all transactional gift processing. University Development is led by Interim Vice President, Erik Greeny who just completed two years in this role. The division has one fewer employee than the year before. Due to a realignment of resources, the division will soon be able to hire a third development officer. This will be the first time in Sonoma State University's history that there have been three development officers. This year also saw the discontinuation of the partnership with San Francisco State University with regard to SSU using their call center for our annual fund. We have reinvested these resources in our mail campaign for 13/14. The Green Music Center has hired Zarin Mehta as its Co-Executive Director. Mr. Mehta will assume fundraising responsibilities for the Center beginning in 2014. This will include the creation of a development office separate from University Development to support the ongoing activities of the Center.

Campus: **Stanislaus**
Peer Group: 1

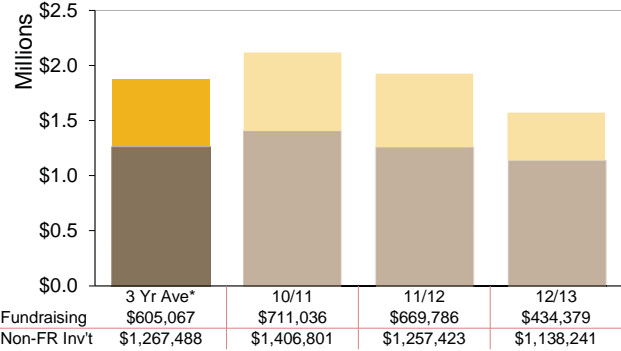
*Three Year Average: 10/11 11/12 12/13

GOAL MATRIX DASHBOARD

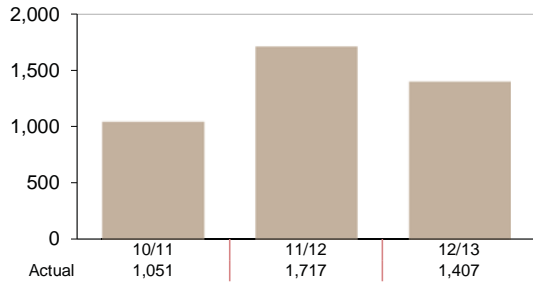
Gift Commitments



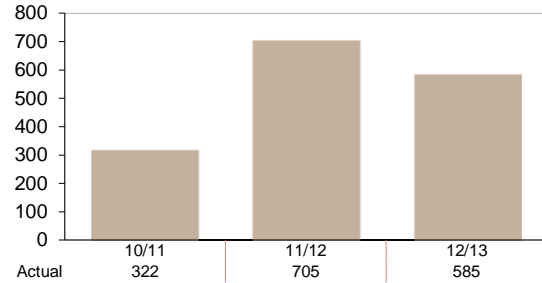
Total Advancement Investment



Number of Individual Donors



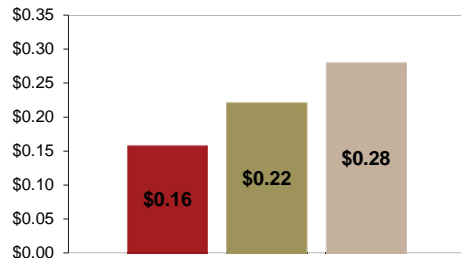
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

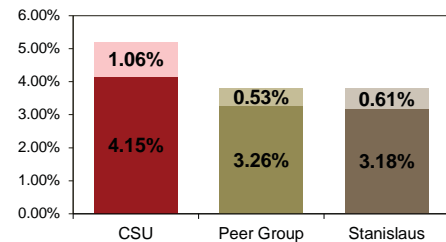
Cost Benefit Analysis

Cost to Raise a Dollar

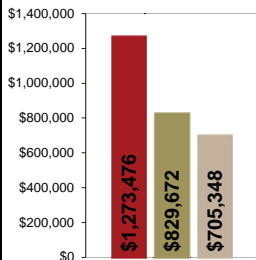


Investment as a Percentage of State General Fund

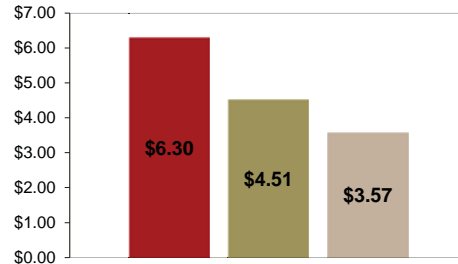
Total Advancement Expenditures



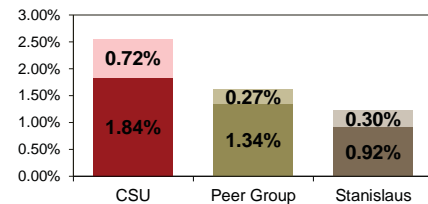
Gift Commitments per FTE Fundraising Professional



Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

The 2013/2014 academic year ended with a new President, a new Vice President of University Advancement, and a fresh focus on rebuilding an integrated advancement program. This momentum will carry into 2014/2015 with measurable goals for meaningful outcomes, specifically those that move the campus toward raising gift commitments that are equivalent to ten (10) percent of the campus' state general fund allocation. The Division of University Advancement has set out to build supportive relationships among its constituents by advocating for the University's regional position and contributions. With a spirit of leadership, the plan for university advancement for 2014 is to: promote a culture of philanthropy by engaging faculty, staff, community members, corporate partners and alumni in a new 6-week annual giving campaign that will launch in the fall of 2014; develop and implement a plan to strengthen the ties between California State University, Stanislaus' 50,000 alumni, keeping them in touch with each other and with Stanislaus; and finally to dedicate efforts to build an environment of advocacy among alumni, students and parents to ensure that CSU Stanislaus can quickly disseminate information and secure support for excellence in public higher education.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Naming of an Academic Program—California State University, Northridge

Presentation by:

Garrett P. Ashley
Vice Chancellor
University Relations and Advancement

Summary

This item will consider naming the College of Business and Economics at California State University, Northridge (CSUN) as the David Nazarian College of Business and Economics.

This proposal, submitted by CSUN, meets the criteria and other conditions specified in Board of Trustees policy for Naming California State University Schools, Colleges, Programs and Other Academic and Non-Academic Units including approval by the system review panel and the campus academic senate.

Background

The proposed naming recognizes the \$10 million contribution by David Nazarian to CSUN's College of Business and Economics. This gift will support the strategic initiatives and priorities of the college. In addition, Mr. Nazarian is committed to helping raise another \$15 million in the next three to five years for the college.

Mr. Nazarian is an alumnus of CSUN with a bachelor's degree in Business Administration. He is currently the CEO of Nazarian Enterprises, a family investment firm concentrating in the fields of private equity, venture capital and real estate. Nazarians were a major shareholder in Qualcomm and Mr. Nazarian focused on investment opportunities to diversify the family holdings. In addition to his business activities, Mr. Nazarian is well known in the Los Angeles community for his active involvement in numerous charities.

Recommended Action

The following resolution is recommended for approval:

RESOLVED, by the Board of Trustees of the California State University, that the College of Business and Economics of California State University, Northridge be named the David Nazarian College of Business and Economics.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Naming of a Facility—California State University, Fresno

Presentation By:

Garrett Ashley
Vice Chancellor
University Relations and Advancement

Summary

This item will consider naming the Softball Diamond in the Department of Intercollegiate Athletics at California State University, Fresno as the Margie Wright Diamond.

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

Background

Margie Wright is the NCAA Division I all-time winningest softball coach and is ranked second all-time in NCAA Division I history for victories regardless of sport.

She retired in May 2012 after guiding the university to its first NCAA Division I team title (1998) and directing the softball program to unparalleled heights.

An U.S. Olympic coach and 15-time hall of famer, Wright amassed 1,457 career wins in 33 years while leading the 'Dogs to 1,294 victories in 27 seasons. With 10 NCAA Women's College World Series (WCWS) appearances under her tutelage, she also led the program to three national runner-up finishes, three third-place showings and three fifth-place performances in the WCWS. In addition, the 10-time conference coach of the year led the softball program to 17 outright or shared conference titles.

This National Coach of the Year saw her squad ranked in the national polls for 27 consecutive years while the fan base led the NCAA in average attendance 13 times and total attendance 10 times. She also was a driving force behind the construction of the softball diamond – the first true major league style ballpark for collegiate softball, which proved to be a blueprint for softball growth on the NCAA Division I level.

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Coach Wright's commitment to the student-athletes and to Fresno State was tireless and she is a highly sought after clinician and motivational speaker. Off the field, her passions were being an advocate for the Central California Blood Bank and the Marjaree Mason Center, a shelter for victims of domestic violence.

Recommended Action

The following resolution is recommended for approval:

RESOLVED, by the Board of Trustees of the California State University, that the Softball Diamond in the Department of Intercollegiate Athletics at California State University, Fresno be named the Margie Wright Diamond.