

AGENDA

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Meeting: 12:30 p.m., Tuesday, March 22, 2011
Glenn S. Dumke Auditorium

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

Consent Items

Approval of Meeting Minutes of January 25, 2011

Discussion Items

1. Naming of a Facility – San Diego State University, *Action*
2. Naming of a Facility – San Diego State University, *Action*
3. Naming of a Facility – Sonoma State University, *Action*
4. Measuring Advancement, *Information*
5. Council for Advancement and Support of Education Awards, *Information*

CORRECTED

**MINUTES OF THE MEETING OF
COMMITTEE ON INSTITUTIONAL ADVANCEMENT**

**Trustees of The California State University
Office of the Chancellor
Glenn S. Dumke Auditorium
401 Golden Shore
Long Beach, California**

January 25, 2011

Members Present

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

Approval of Minutes

The minutes of November 9, 2010, were approved by consent as submitted.

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

Vice Chancellor for University Relations and Advancement Garrett P. Ashley presented the report on the request to name the Community and Labor Studies Institute at CSU Channel Islands as The Henry L. “Hank” Lacayo Institute for Workforce and Community Studies.

Mr. Ashley stated that the proposed naming recognizes Mr. Henry Lacayo, a nationally recognized labor leader with over 50 years of distinguished service, for his continued support to the university and to the surrounding campus community. He added that the naming also acknowledges over \$500,000 in contributions received thus far from major corporations and community members to help launch the institute in Mr. Lacayo’s honor.

Ms. Joanne Coville, vice president for business at CSU Channel Islands, commented in President Rush’s absence on Mr. Lacayo’s long career in labor rights and activism. She noted that he was an early and important friend of the university who helped garner community support when the campus opened its doors. She also relayed that the creation of the Henry L. “Hank” Lacayo

Institute will help provide valuable resources and information critical to policy development and the prosperity of businesses at the local, state and national level.

Chancellor Reed thanked Mr. Lacayo for his lifelong humanitarian efforts and expressed his hope that the students at CSU Channel Islands and the surrounding community would use the institute to further the work that Mr. Lacayo has done and continues to do on behalf of the underserved communities in California.

Mr. Lacayo thanked everyone for their kind remarks and expressed his gratitude to President Richard Rush, Provost Dawn Neuman and Community and Government Relations Director Celina Zacarias for helping to organize the establishment of the institute. He stated that the naming of the institute in his honor is not as important as what the institute will do to help others.

The committee recommended approval of the proposed resolution (RIA 01-11-01).

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

Vice Chancellor Ashley thanked the presidents, their campus teams and donors for achieving \$265 million in gift commitments this year. He noted that during these difficult economic times, philanthropic support has become vital to the CSU's existence. He also emphasized that state investment in higher education is even more critical in order for the CSU to keep its promise of providing access to all eligible students.

Assistant Vice Chancellor Lori Redfearn presented a PowerPoint presentation with charts that outlined the gift commitments by various campus groups. She reported that nearly half of all giving to the CSU this past year came from Peer Group 3 campuses (Fresno, Long Beach, San Diego and San Luis Obispo) and noted that some of the smaller campuses showed an increase in fundraising over the previous year.

Ms. Redfearn further reported that new gift pledges dropped 40 percent this year; testamentary commitments decreased by 40 percent; and gift commitments have dropped by 12.5 percent, which is in line with the national experience for contributions to universities. She noted that the CSU endowment market value increased by 18 percent and the return on investments was anticipated to be slightly better than national peer institutions. Although Foundation giving decreased last year, corporate giving increased, alumni and parent giving remained steady, and the numbers of donors are back on the rise.

In response to Trustee Hauck's inquiry, Ms. Redfearn noted that some campuses have been able to ramp up their parent programs by obtaining parental contact information, resulting in extremely generous success in their annual fund programs. Although the overall increase has been marginal, there is a lot of potential in that area.

Trustee Fong asked if campuses have created any new initiatives to help make up for the shortfall that they are experiencing in giving. Ms. Redfearn responded that most campuses are

either in a comprehensive campaign, planning for a campaign or doing some sort of strategic initiative to ramp up their advancement efforts. She explained that advancement was hampered last year by furloughs as we had 10 percent less volume of employees going out and asking; but we are continuing to forge ahead and make our case that investing in the CSU is important.

The committee recommended approval of the proposed resolution (RIA 01-11-02).

Trustee Fong adjourned the Committee on Institutional Advancement.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Naming of a Facility – San Diego State University

Presentation By

Garrett P. Ashley
Vice Chancellor
University Relations and Advancement

Summary

This item will consider naming the Aztec Athletic Center at San Diego State University (SDSU) as the Fowler Athletics Center.

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

Background

The proposed naming of the facility acknowledges the \$5 million gift to SDSU from Alexis and Ron L. Fowler. This donation demonstrates the Fowlers' commitment to Aztec Athletics' mission of providing a balanced, high-quality education for student athletes and pursuing competitive success against major collegiate competition. The gift will be used to challenge alumni, donors and fans to continue building a successful intercollegiate athletic program.

A successful businessman and philanthropist, Mr. Fowler serves as chairman of Liquid Investments, the parent company of operating entities in California and Colorado that specialize in beverage distribution. He is a dedicated civic leader who chaired the Padres Task Force for a new ballpark and the 2002 Super Bowl host committee, both of which brought millions into San Diego. In 1999, San Diego State President Stephen Weber asked Mr. Fowler to become the first chair of The Campanile Foundation, SDSU's philanthropic auxiliary. Mr. Fowler helped shape the new board into an effective fundraising organization, which has secured over \$600 million in private gifts over the past 11 years.

Ms. Alexis Fowler is a successful CPA who earned a Master of Accounting from SDSU in 1993. She served as an adjunct faculty member, teaching undergraduate classes in the areas of financial and managerial accounting. Additionally, Ms. Fowler has served as a consultant to the San Diego Padres Ballpark Task Force, which resulted in the public approval and construction of

PETCO Park. Known for her support of education at all levels, she was appointed to The Campanile Foundation in 2008.

The Fowlers' remarkable record of philanthropic support to SDSU includes giving to both academics and athletics. Mr. Fowler founded San Diego State's highly acclaimed Entrepreneurial Management Center. Since then, the program has been ranked by *U.S. News & World Report* as among the best in the country. Other gifts from the Fowlers have supported the L. Robert Payne School of Hospitality and Tourism Management, the Parma Payne Goodall Alumni Center and athletic scholarships. Including this latest challenge gift, the couple's total philanthropic and sponsorship support of SDSU nears \$10 million.

In 2006, the Fowlers were awarded "Monty" awards for their distinguished services to SDSU. Also, for his many contributions, Mr. Fowler received an honorary Doctor of Humane Letters from SDSU in 2005.

The following resolution is recommended for approval:

RESOLVED, by the Board of Trustees of the California State University, that the Aztec Athletic Center at San Diego State University be named the Fowler Athletics Center.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Naming of a Facility – San Diego State University

Presentation By

Garrett P. Ashley
Vice Chancellor
University Relations and Advancement

Summary

This item will consider naming the Veterans Center at San Diego State University (SDSU) as the Joan and Art Barron Veterans Center.

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

Background

The proposed naming of the facility acknowledges the \$1 million gift from Joan and Arthur R. Barron to San Diego State and marks the first seven-figure private gift in the California State University system dedicated to supporting student veterans. The funds will support operating expenses for the Veterans Center at San Diego State University in perpetuity.

Arthur R. Barron ('60, '98) and his wife, Joan, are dedicated and visionary partners with San Diego State. Mr. Barron was one of the first members of the SDSU Troops to College Honorary Committee. The committee is comprised of military and civilian leaders who are committed to advising San Diego State on the most effective services and programs the campus can provide to its military students and making recommendations regarding community supporters who may be willing to champion its efforts.

The Barron's initial Troops to College gift inspired others to follow, and \$1.4 million has been raised in philanthropic support for various initiatives. These include operating expenses for the Veterans Center, student veteran scholarships, the SDSU Veterans House, Student Veterans Organization operations, textbook vouchers, Combat Leadership Panel funding, Wounded Warrior Academic Advisor position funding and expansion of the SDSU War Memorial.

Inst. Adv.
Agenda Item 2
March 21-22, 2011
Page 2 of 2

Most importantly, Mr. Barron has touched the lives of numerous student veterans, especially inspiring SDSU's nationally recognized Student Veterans Organization. He met with, guided and inspired SDSU campus and student leaders as they built the foundation for the Troops to College program at San Diego State.

The following resolution is recommended for approval:

RESOLVED, by the Board of Trustees of the California State University, that the Veterans Center at San Diego State University be named the Joan and Art Barron Veterans Center.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Naming of a Facility – Sonoma State University

Presentation By

Garrett P. Ashley
Vice Chancellor
University Relations and Advancement

Summary

This item will consider naming three venues within the Green Music Center at Sonoma State University as follows: Joan and Sanford I. Weill Hall; Joan and Sanford I. Weill Lawn; and Joan and Sanford I. Weill Commons.

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

Background

The proposed naming recognizes the \$12 million gift commitment by Joan and Sanford Weill to Sonoma State University's Green Music Center. This gift is the largest single cash gift to Sonoma State University and the Green Music Center.

The Green Music Center complex, currently under construction, allows for the integration of performing arts, particularly the choral and instrumental music field. A naming opportunity has been presented to the university for the 1,400-seat concert hall and surrounding open spaces within the Green Music Center complex. The concert hall at the Green Music Center has many of the same properties as the world's greatest music halls. It has many features, including variable acoustics, which will enable the space to be utilized for a variety of uses, including lecture-style instruction, choral, chamber, vocal, and instrumental rehearsals and performances. The open spaces surrounding the concert hall will accommodate up to 13,000 students and others.

The concert hall and surrounding open spaces at the Green Music Center are considered to be the epitome of academic and performing arts excellence not only for the campus but for the surrounding region as well.

Joan and Sandy Weill, born in Brooklyn, New York, are two of the country's most generous philanthropists. For many years they have been committed to advancing the arts and education not only through their philanthropy but through their volunteer leadership. They acquired a home in Sonoma, California, 20 miles from the Sonoma State University campus. Within their first few months in the county, they learned of the Green Music Center and instantly recognized the transformational effect it will have on Sonoma State University, the region and the larger national and international arts scene. Already the Weills have become well-respected members of their new community.

Sandy Weill graduated from Cornell University in 1955 and began a career in finance that included leadership roles in a number of major corporations, including American Express and Travelers. He later spearheaded the merger of Citicorp and Travelers, resulting in Citigroup—a firm he led as CEO until 2003 and as chair until his retirement in 2006.

Mr. Weill has been chair of the Board of Trustees of Carnegie Hall since 1991. He also serves as founder and chair of the National Academy Foundation, an organization he started in 1982. Mr. Weill is Chairman of the Board of Overseers for The Joan and Sanford I. Weill Medical College and Graduate School of Medical Sciences of Cornell University, having joined the board in 1982 and becoming chair in 1995. Weill Cornell established the first American medical school overseas in Doha, Qatar, in 2001. Weill Cornell also has an academic affiliation with Methodist Hospital in Houston, Texas.

Joan Weill earned a bachelor's degree in elementary education from Brooklyn College in 1956. For the past ten years she has served as chair of the board of the Alvin Ailey American Dance Foundation. Ms. Weill is also co-chair of the advisory committee of the Weill Music Institute at Carnegie Hall. Her dedication to women's health issues led to her appointment as co-chair of the New York Presbyterian/Weill Cornell Medical Center's Women's Health Symposium. She is also an honorary board member and president emeritus of Citymeals-on-Wheels; and past chair of the Board of Trustees for Paul Smith's College of the Adirondack.

The following resolution is recommended for approval:

RESOLVED, by the Board of Trustees of the California State University, that the Green Music Center concert hall and surrounding open spaces at Sonoma State University be named in perpetuity the Joan and Sanford I. Weill Hall, Lawn and Commons.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Measuring Advancement

Presentation By

Lori A. Redfearn
Assistant Vice Chancellor
Advancement Services

Summary

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

Background

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

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

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

CSU Advancement Classification Model

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

Group I campuses typically have fewer than 10 full-time fundraising professionals, less than 5,000 individual donors, and endowments of less than \$25 million. The primary focus for these programs is to build infrastructure and develop a donor base. The development operation may also be engaged in some limited capital or themed campaigns. These institutions are striving to achieve a fundraising benchmark that is comparable to 10 percent of the state general fund allocation.

Group II campuses typically have 10 to 20 full-time fundraising professionals, 5,000 to 10,000 thousand individual donors, and endowments valued between \$25 million to \$50 million. Development programs at these institutions are striving to be more comprehensive and may include specialists in annual giving, planned giving and corporate/foundation relations. These campuses are commonly engaged in capital or themed campaigns. The expectation is that these campuses will raise private funds comparable to 10 percent to 15 percent of the state general fund allocation.

Group III campuses typically have over 20 full-time fundraising professionals, more than 10,000 individual donors, and more than \$50 million in endowment funds. Group III campuses have greater opportunity to increase investment in fundraising from non-state sources such as unrestricted gifts and endowment management fees. These programs have engaged in or are positioning for comprehensive campaigns. The fundraising benchmark for Group III campuses is 15 percent of the state general fund allocation.

The following chart compares gift commitments to the state general fund allocation for the last three years. Evaluation of progress in reaching benchmarks is focused on the three-year average, which helps to level fluctuations that may occur due to the receipt of significant major gifts.

Gift Commitments Compared to State General Fund Allocation

Campus	2007/08	2008/09	2009/10	Three Year Average
<i>Group I</i>				
Bakersfield	7%	7%	10%	8%
Channel Islands	7%	5%	8%	6%
Dominguez Hills	3%	5%	4%	4%
East Bay	2%	3%	8%	4%
Humboldt	4%	6%	12%	7%
Los Angeles	7%	20%	10%	12%
Maritime Academy	6%	21%	7%	11%
Monterey Bay	10%	10%	8%	9%
San Bernardino	38%	8%	6%	19%
San Marcos	4%	6%	6%	5%
Stanislaus	4%	4%	5%	4%
<i>Group I Average</i>	10%	9%	8%	9%

<i>Group II</i>				
Chico	9%	6%	8%	8%
Fullerton	19%	8%	8%	12%
Northridge	10%	7%	9%	9%
Pomona	4%	18%	8%	10%
Sacramento	11%	10%	8%	10%
San Francisco	10%	11%	13%	11%
San Jose	15%	11%	16%	14%
Sonoma	21%	12%	7%	14%
<i>Group II Average</i>	12%	10%	10%	11%

<i>Group III</i>				
Fresno	16%	35%	13%	21%
Long Beach	17%	16%	19%	17%
San Diego	30%	28%	37%	31%
San Luis Obispo	63%	17%	17%	34%
<i>Group III Average</i>	30%	24%	23%	26%

<i>System Average</i>	16%	13%	12%	14%
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Investments in Advancement

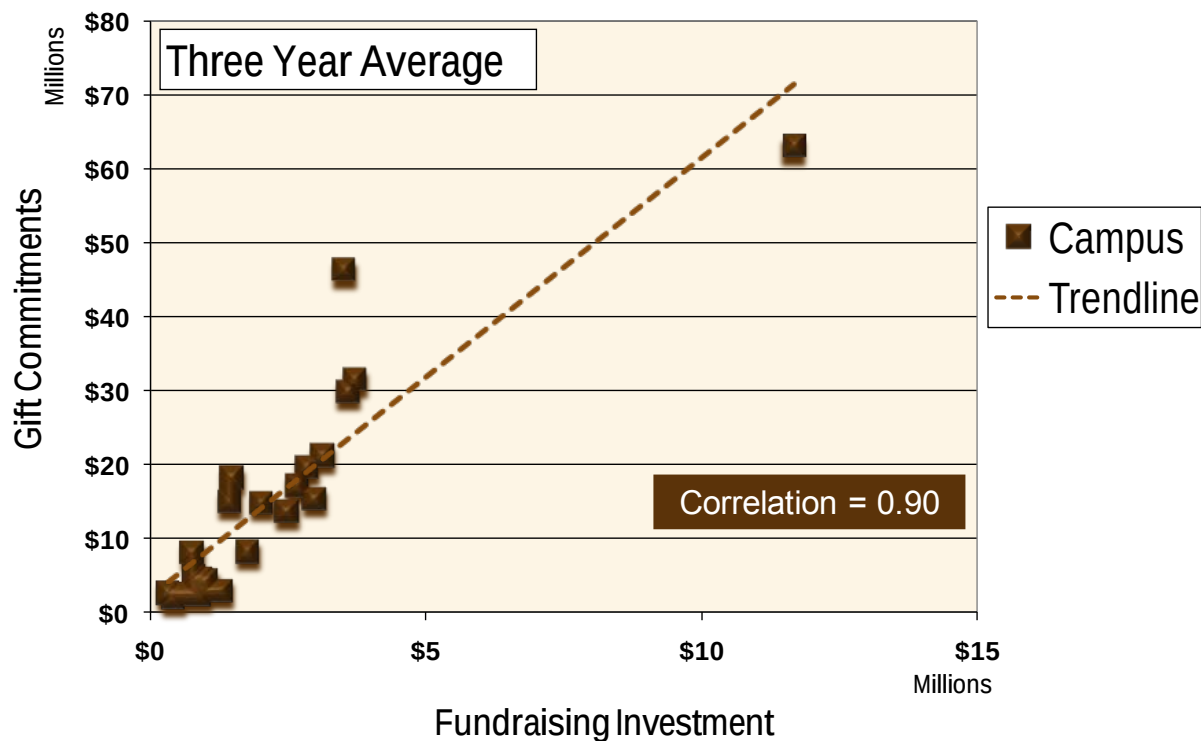
For 2009-2010, the California State University system's net return on fundraising investment in relation to gift commitments of \$265 million was 447 percent. The median campus net return on investment was 372 percent. Even with a 27 percent decline in gift commitments due to the economy, the investment in program produced a substantial return. When viewed over a three-year period, the CSU net return on investment was 590 percent.

The three-year average cost to raise a dollar for the system was 15 cents. For a comprehensive fundraising operation, the target range for the cost to raise a dollar is 15 to 25 cents. The CSU has yet to fully develop annual fund programs, planned giving programs and other prospecting functions that add cost but are important efforts in building capacity.

Predominately as a result of furloughs, investment in Advancement decreased by more than \$10 million in 2009-2010 and the impact of looming budget cuts is anticipated for 2010-2011. Cuts to Advancement efforts stymie the university's ability to communicate with its constituents, to engage alumni, to maintain fundraising momentum, and to be positioned to take advantage of the economic recovery when it happens.

The chart below compares the three-year average of gift commitments compared to the three-year average of fundraising investments. With a 90 percent positive correlation between investments in fundraising and resulting gift commitments, the trendline shown is a good indicator for understanding investment is necessary to reach fundraising goals.

Dollars Invested is Significantly Related to Dollars Raised



Goal Dashboards

Each campus has submitted data indicating past performance, as well as goals 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).

An overview of the campus university advancement goals for performance will be presented at the meeting.

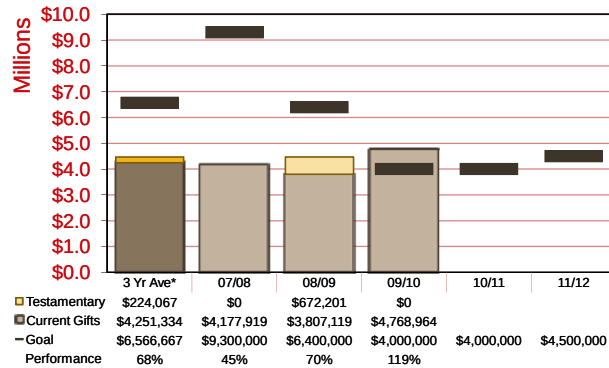
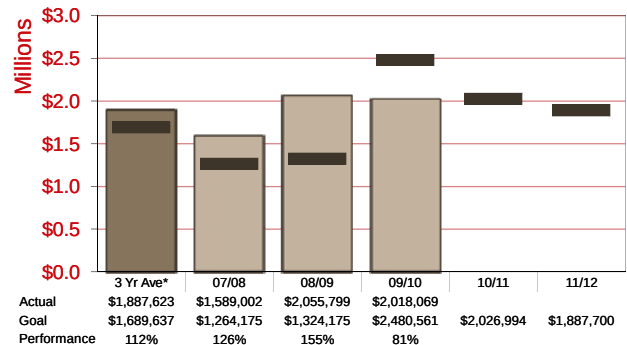
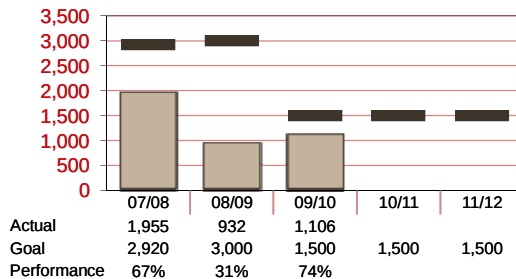
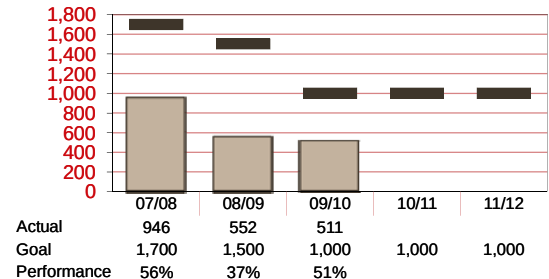
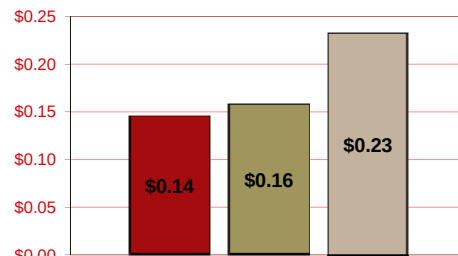
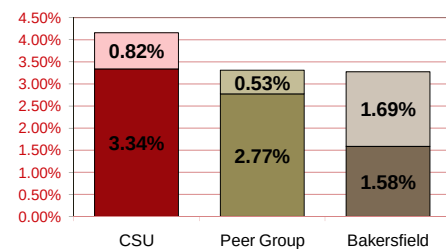
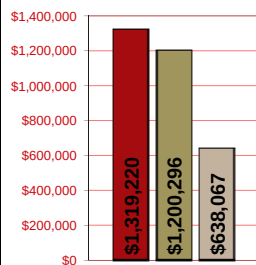
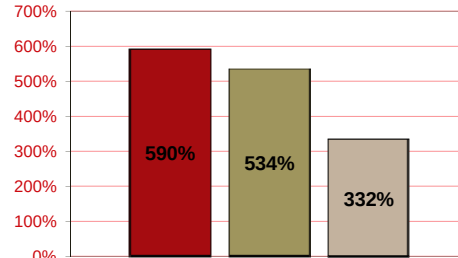
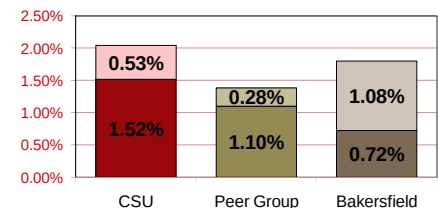
University Advancement

Campus Plans Dashboards

2010-11

Table of Contents

<u>Campus</u>	<u>Page</u>
Bakersfield	1
Channel Islands	2
Chico	3
Dominguez Hills	4
East Bay	5
Fresno	6
Fullerton	7
Humboldt	8
Long Beach	9
Los Angeles	10
Maritime Academy	11
Monterey Bay	12
Northridge	13
Pomona	14
Sacramento	15
San Bernardino	16
San Diego	17
San Francisco	18
San José	19
San Luis Obispo	20
San Marcos	21
Sonoma	22
Stanislaus	23

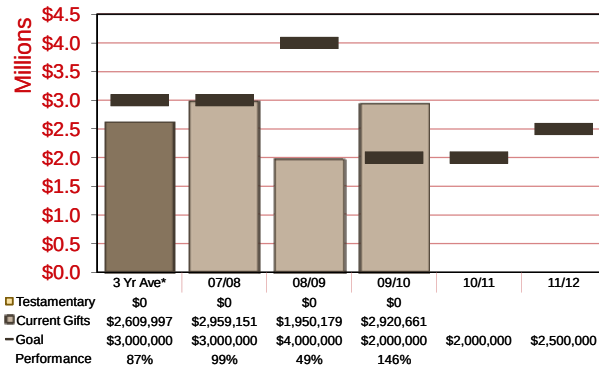
GOAL MATRIX DASHBOARD
Gift Commitments**Total Advancement Investment****Number of Individual Donors****Number of Alumni Donors****MEASURING ADVANCEMENT (Three Year Average*)****Cost Benefit Analysis****Cost to Raise a Dollar****Investment as a Percentage of State General Fund****Total Advancement Expenditures****Gift Commitments per FTE Fundraising Professional****Net Return on Investment****Fundraising Expenditures****ENVIRONMENTAL SCAN / COMMENTS**

CSUB remains determined to provide students with an excellent educational experience despite the continued economic turmoil in the State of California. Academic year 2009-10 marked CSUB's 40th anniversary, during which time University Advancement played an essential role in raising the awareness of CSUB's Vision of Excellence to a greater number of donor constituencies and more actively engaging current and prospective donors. The result has been an increase in dollars raised for CSUB. Over 100 university-wide fundraising initiatives were appraised and prioritized. The top 10% were developed into case statements and reviewed by the CSUB Foundation Board and other key community stakeholders. Significant new fundraising projects included the establishment of a community-based Small Business Development Center and a new academic program in Agribusiness. Critical staffing and infrastructure needs continued to be a focus for the Vice President during her second year as the new division leader along with a sharpened focus on securing external sources of support with an emphasis on major prospects and strategic solicitations. This resulted in several new gifts of \$100K or more, including a \$500K gift to permanently endow an existing academic program, a \$100K gift to allow geology students study in the field, and a \$150K gift to expand community outreach with a new highway marquee. The University received \$19.2 million in grants and contracts AY2009-10. The university also successfully completed the Western Association of Schools and Colleges Capacity and Preparatory Review as well as received full status as an NCAA Division I athletics program.

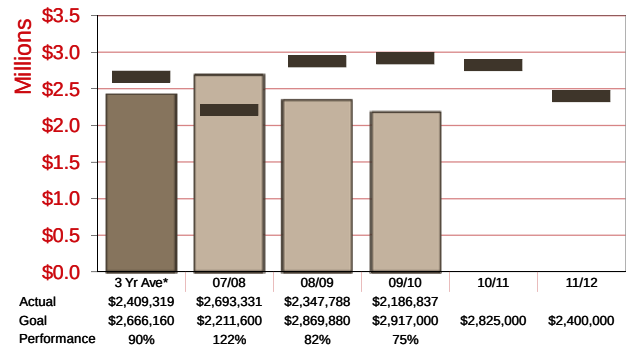
GOAL MATRIX DASHBOARD

Actual Goal

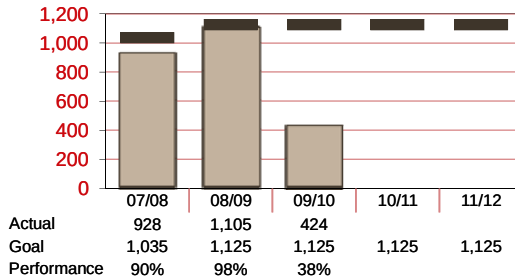
Gift Commitments



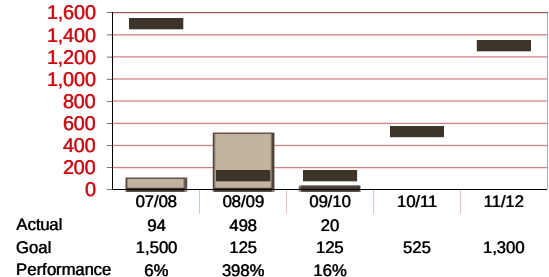
Total Advancement Investment



Number of Individual Donors



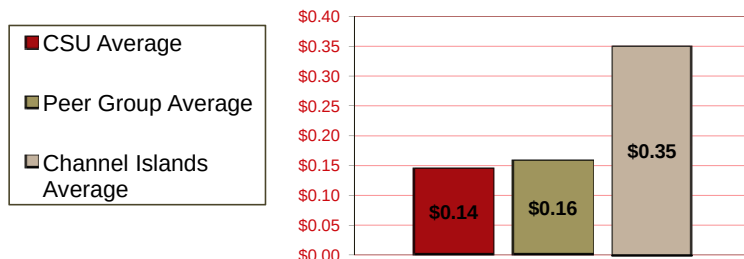
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

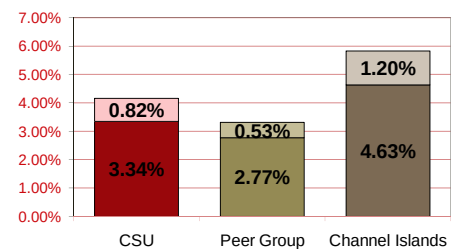
Cost Benefit Analysis

Cost to Raise a Dollar

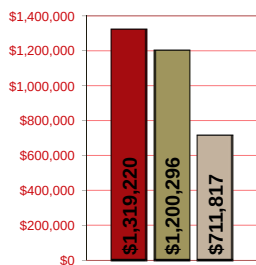


Investment as a Percentage of State General Fund

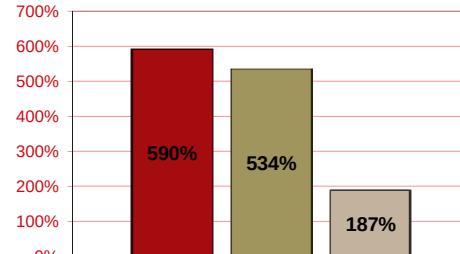
Total Advancement Expenditures



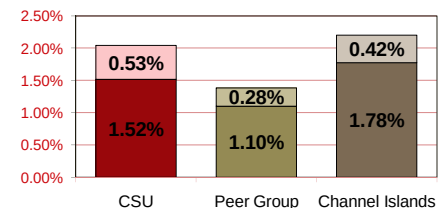
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

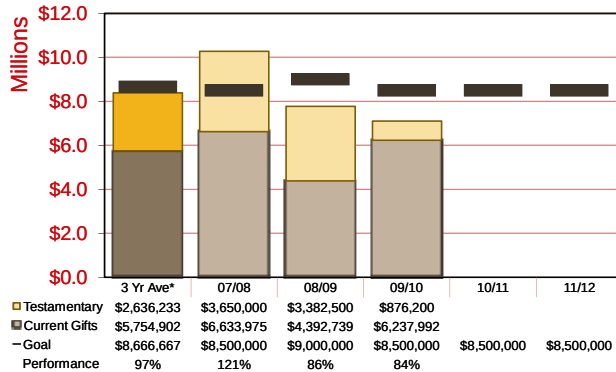
It was the year of the budget-cuts and all the challenges associated with doing more with less. The impact of furloughs and fewer resources continues to be felt as we scramble to regain momentum of the previous year. Despite those difficulties, the division continued to raise the awareness, reputation and financial support of the University in new and innovative ways.

In 2010 total gift commitments were up 49% - a milestone since we only have 1 major gifts officer. With two major gifts officers in 2011, (doubling the team) we have set our fund-raising goal at 25% higher than last - from \$2M to \$2.5M. We take this bold step for several reasons. Two empty positions were filled with new hires and with that comes fresh energy and talent. We also gained ground in building UA infrastructure - refreshed website for Advancement, re-evaluated prospects with Wealth Engine Screening, built social media into our web presence - all this leading to a more efficient and productive development function. We received more press coverage than in the past bringing greater community support. Emphasis on planned giving continues with a strong volunteer Planned Giving Advisory Group which was significantly expanded last year. The Director of Community and Government Relations greatly enhanced CI's advocacy efforts on legislative issues identified by the Chancellors Office. Communication and Marketing successfully completed Phase II of our re-branding process - making sure that messaging was consistent across campus and throughout the community. Alumni and Friends Association is playing a significant role in building a bridge with the local Chambers of Commerce for career services to alumni.

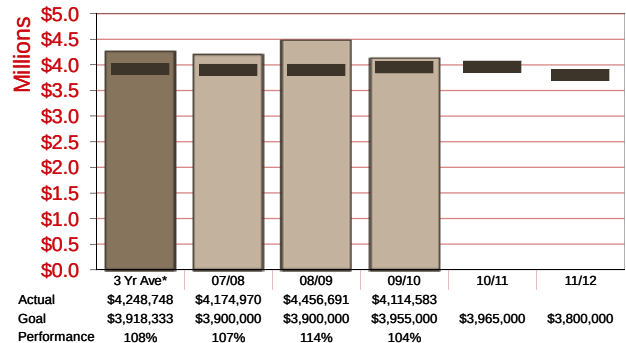
GOAL MATRIX DASHBOARD

Actual Goal

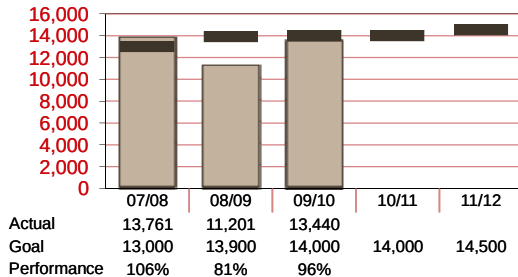
Gift Commitments



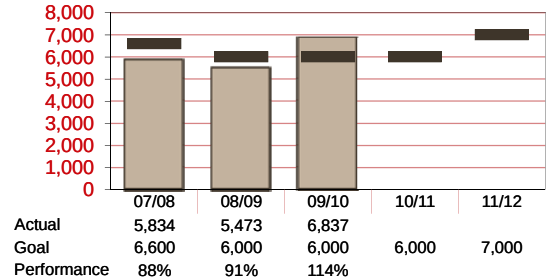
Total Advancement Investment



Number of Individual Donors



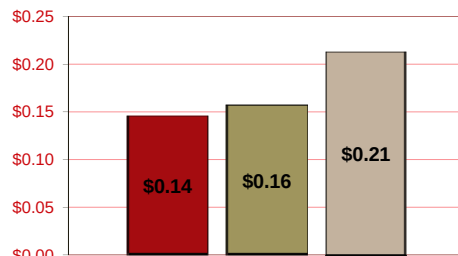
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

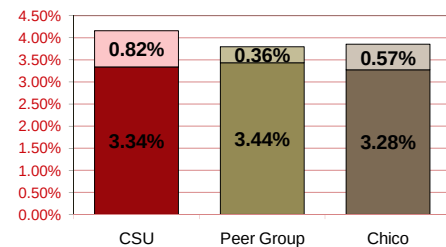
Cost Benefit Analysis

Cost to Raise a Dollar

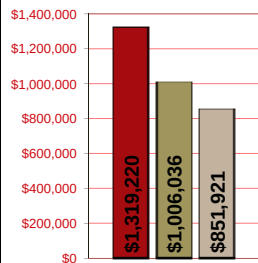


Investment as a Percentage of State General Fund

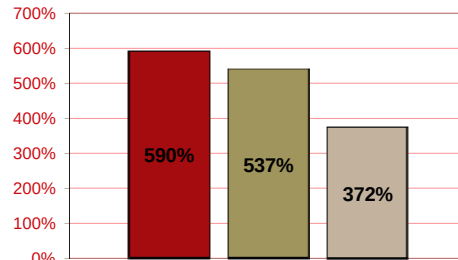
Total Advancement Expenditures



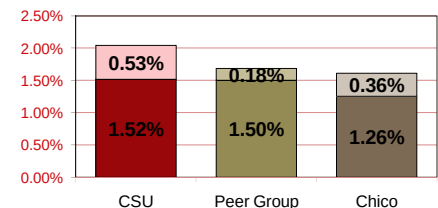
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

Although challenged by the state's continuing financial crisis, CSU, Chico continues to prepare for its first-ever comprehensive campaign. The role of University Advancement is now more vital than ever before. And, Chico State has had sustained growth in the number of stakeholders and investors. This is not surprising as evidenced by alumni reaction to the Chico Experience Week, featuring more than 90 campus and community events, strengthening an already established town-and-gown relationship. Our graduates demonstrate high loyalty and affinity, continually telling us that there is great value in a Chico State degree.

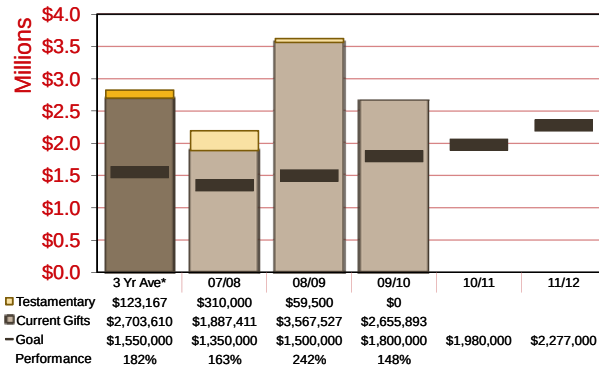
Overall, CSU, Chico had a productive year. The Annual Fund established an all-time high in both dollars and donors and gifts from foundations increased significantly with grants from the Foor Foundation and the Butte Creek Foundation regionally, and grants from national institutions, the Bernard Osher Foundation, W. M. Keck Foundation and the Irvine Foundation.

In major gifts the University felt the impact of uncertain economic times, falling short of last year's overall target goal. However, there are positive indicators for the future. Cash gifts to the institution were up by \$2 million, and while total dollars were down, there was a 29 percent increase in the number of donors. In light of that, Advancement is redoubling its effort to focus on major gift fundraising: re-directing the role of advancement personnel to concentrate on major prospect development; increasing resources to support additional prospect visits; and engaging senior leadership in an increased role in advancement.

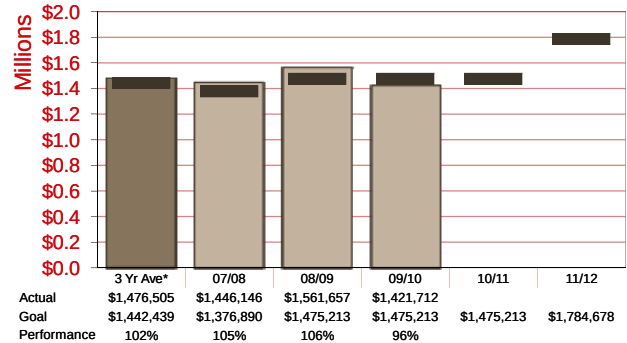
GOAL MATRIX DASHBOARD

Actual Goal

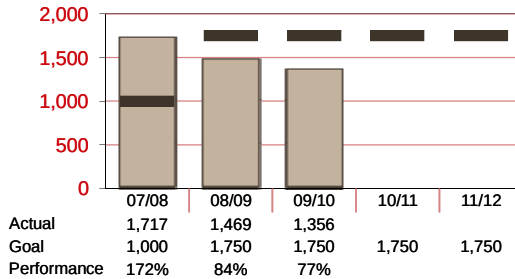
Gift Commitments



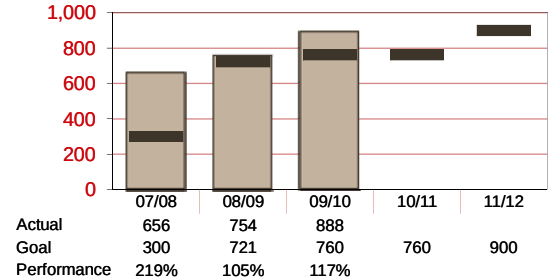
Total Advancement Investment



Number of Individual Donors



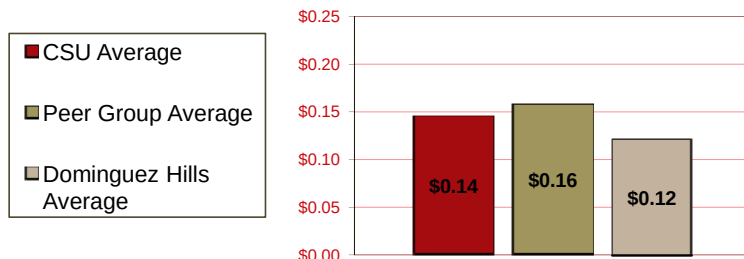
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

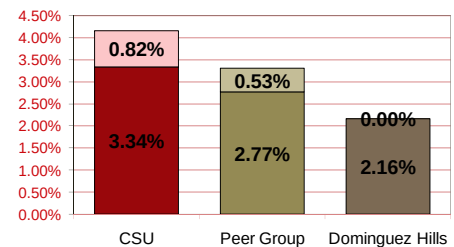
Cost Benefit Analysis

Cost to Raise a Dollar

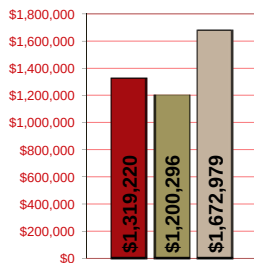


Investment as a Percentage of State General Fund

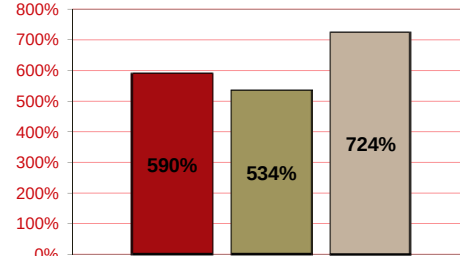
Total Advancement Expenditures



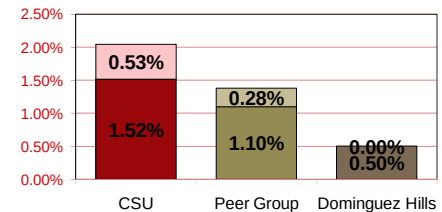
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



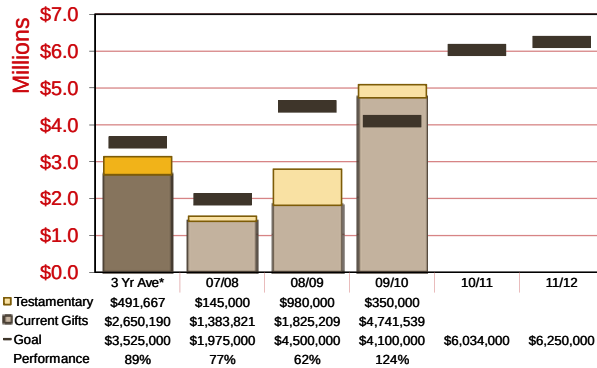
ENVIRONMENTAL SCAN / COMMENTS

University Advancement at CSU Dominguez Hills continues to enjoy a positive trend of progress that is indicated through increased philanthropic support, enhanced media placement, an increase in events, as well as a greater recognition of the University in the greater Los Angeles and South Bay communities. Through the leadership of President Mildred García, we have been able to continue an aggressive effort to expand the reach of the campus while at the same time further develop the backend of our advancement operation, expand our services to the campus community, and present ourselves more professionally to external constituents through events and activities. While the Division of University Advancement is not immune to the continuing economic crisis, we have been able to show noteworthy growth over the last two years. From FY 2007-08 to FY 2009-10, cash giving has increased over 30%, the number of alumni donors over 17%, media placements by 62%, and our community engagement strategy has resulted in over 100,000 visitors to our campus for that same period. At the same time we have continued our active advocacy program by visiting and actively partnering with all of the state, county and local representatives in our service area. By incorporating the goals and objectives outlined by the University's strategic plan that was unveiled in Fall of 2010, we expect to successfully, and strategically, expand the role of University Advancement on-campus while further growing our external presence and resources.

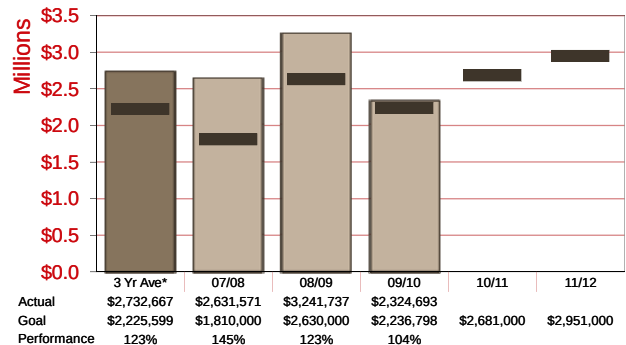
GOAL MATRIX DASHBOARD

Actual Goal

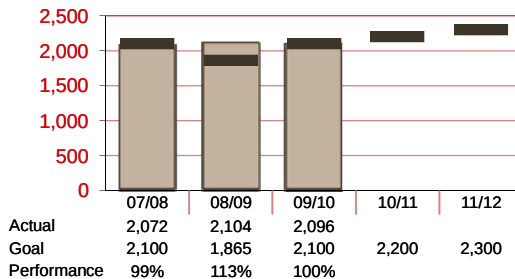
Gift Commitments



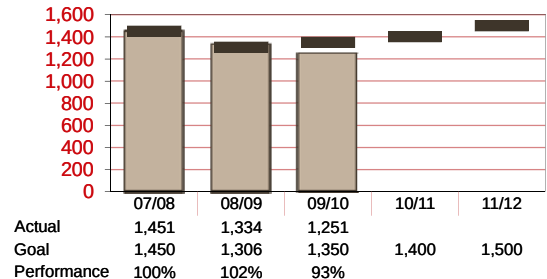
Total Advancement Investment



Number of Individual Donors



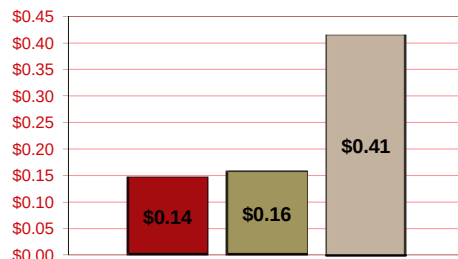
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

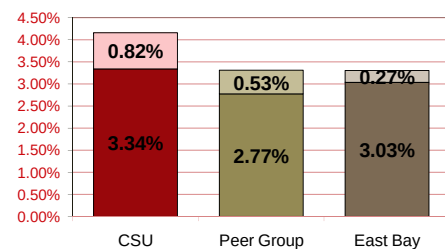
Cost Benefit Analysis

Cost to Raise a Dollar

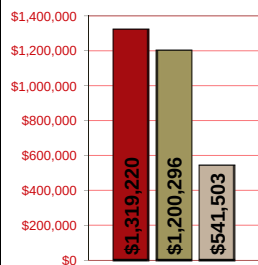


Investment as a Percentage of State General Fund

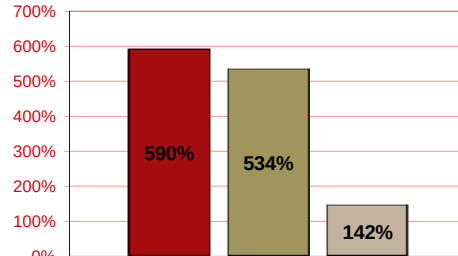
Total Advancement Expenditures



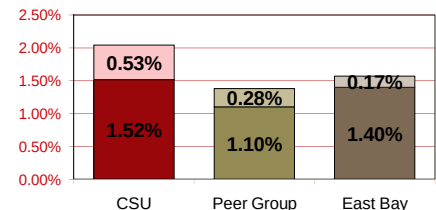
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



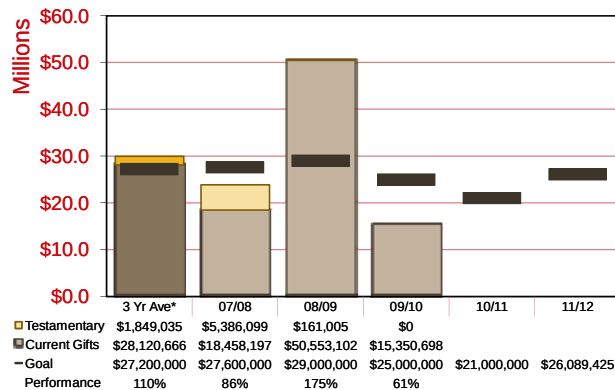
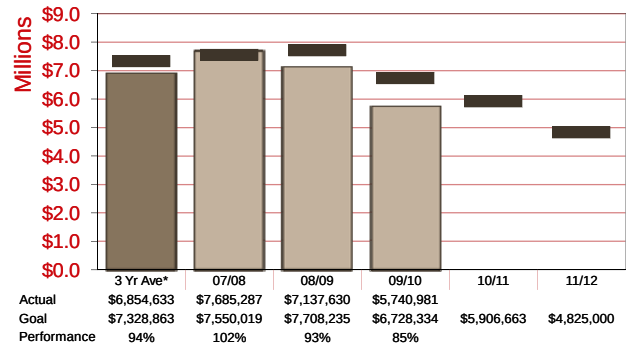
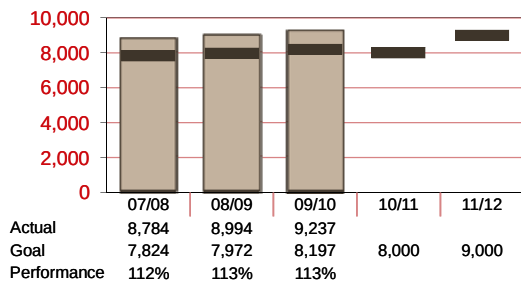
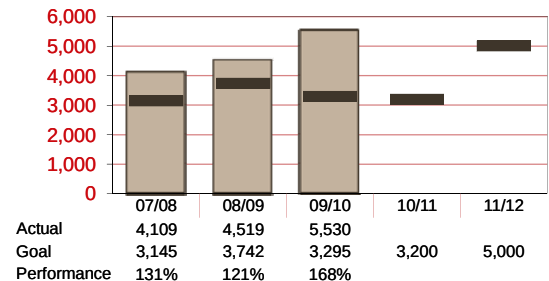
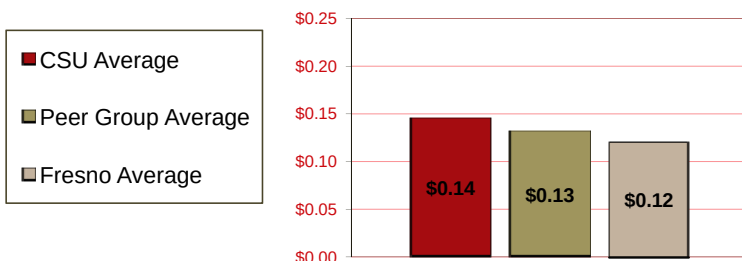
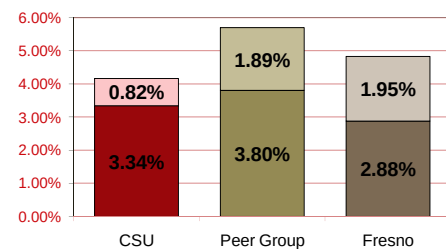
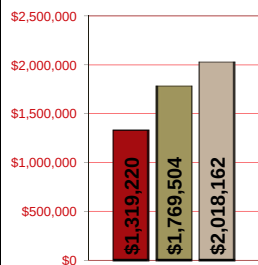
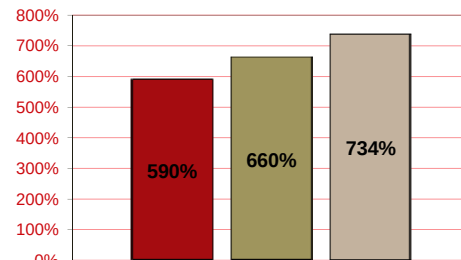
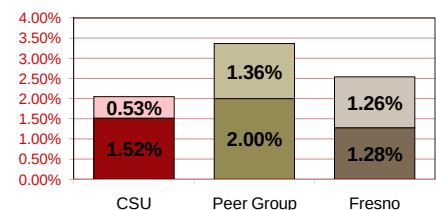
Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

During the past three years, University Advancement played a leading role in developing branding, marketing, and communications strategies, tools, and programs that not only helped attract and recruit record freshman applications and enrollment, but that also markedly increased regional awareness of the University. At the same time, however, alumni engagement and support has remained low. A major step toward addressing this challenge was taken with the launch in July 2009 of the leadership ("quiet") phase of the University of Possibilities Campaign, the university's first comprehensive campaign. Because CSUEB has positioned itself as a vital contributor to workforce development, corporations and foundations are expected to be key to the campaign's success. With the notable exception of one campaign-inspired \$1 million pledge, giving from individuals over the past year has been significantly hampered by the recession and personnel turnover. Our prospective major gift donors for the most part remain in a "wait and see; ask me later" mode. Searches to fill vacancies in management and major gift/corporate and foundation fundraising positions are close to completion, but vital support positions are either vacant or unauthorized due to budget constraints. While we expect significant grants from corporations and foundations in 2010-11, funds raised by new major gifts officers will be limited in their first 12 to 18 months. In 2009-10, advancement expenditures were reduced to 69% of the 2008-09 level but will be partially restored in 2010-11 (to 83% of the 2008-09 level). We project 2011-12 advancement expenditures to increase by 10% from 2010-11 as partial-year salaries for new hires move to full-year. This will no doubt be offset by an expected reduction in State support of an unknown amount.

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****Net Return on Investment****Fundraising Expenditures****ENVIRONMENTAL SCAN / COMMENTS**

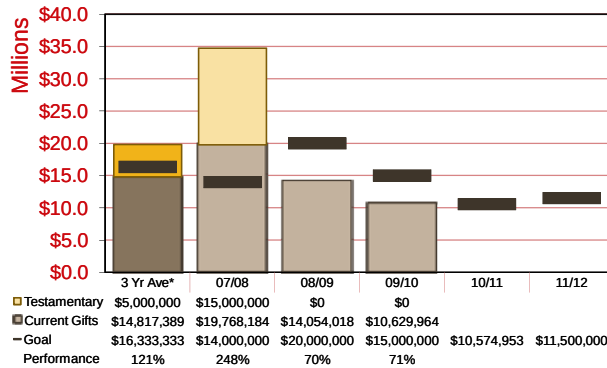
The impact of America's and more importantly California's economic roller coaster continues to have a dramatic effect on our Advancement efforts at Fresno State, particularly the development program. Staff and volunteers continue to focus with laser-like precision on the Campaign for Fresno State. Monetary and non-monetary goals are being achieved, including the creation of a culture of philanthropy on and off the campus. Volunteer leadership continues to be effective, and we are rejoicing at the successes of our volunteers and staff.

Budget downturns have significantly reduced state and non-state support to Advancement. The Advancement workforce has been reduced by more than 25%. Our environmental scan can hardly ignore the long-term negative impacts on the university's ability to sustain its private fundraising efforts. And yet, volunteers and staff are rising to meet the challenges and success seems achievable.

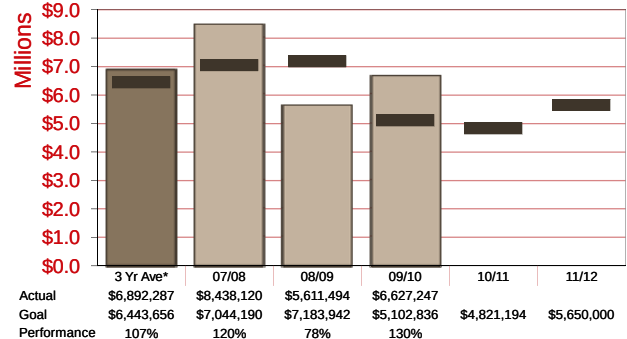
GOAL MATRIX DASHBOARD

Actual Goal

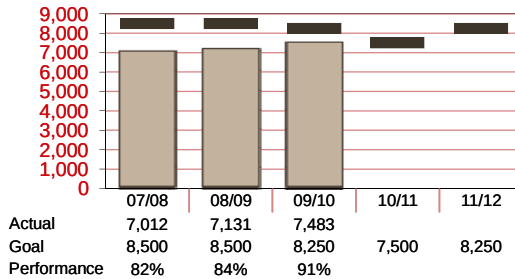
Gift Commitments



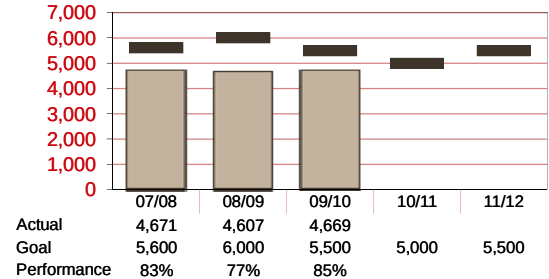
Total Advancement Investment



Number of Individual Donors



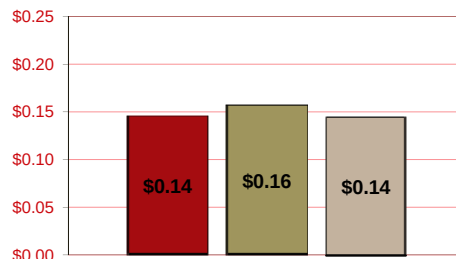
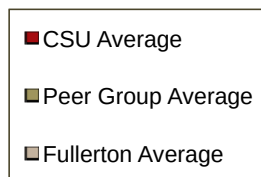
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

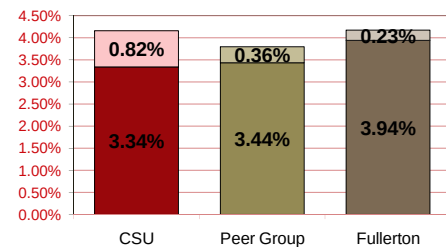
Cost Benefit Analysis

Cost to Raise a Dollar

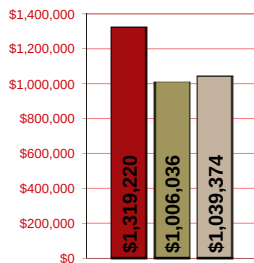


Investment as a Percentage of State General Fund

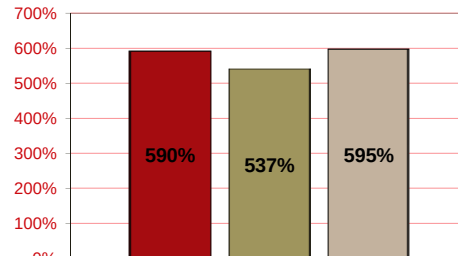
Total Advancement Expenditures



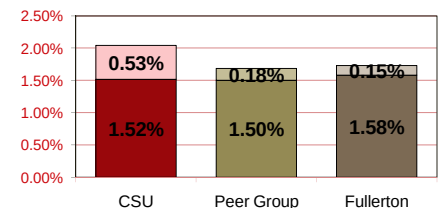
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

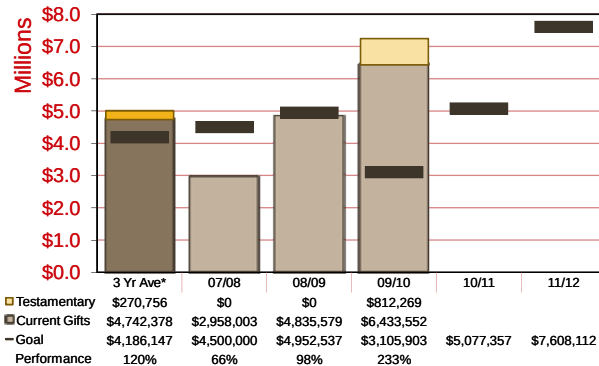
The 2010 - 2011 fiscal year continues to provide challenges in our efforts to garner external support for our University. The current economic environment coupled with political uncertainty has forced us to re-examine our strategies and priorities with a deliberate eye toward effective and proven fundraising projects. Our goal for 2010 - 2011 is \$10.5 million, about \$700,000 less than 2009 - 2010.

As we look at 2011 and beyond, the economic environment is forecasted to improve, but slowly. But there are a number of initiatives within the internal CSUF environment that hold great promise in terms of ensuring that fundraising, communications, alumni engagement, and advocacy efforts are focused and effective in meeting university objectives. For these, please refer to the full document: "California State University, Fullerton Three-Year Plan for University Advancement".

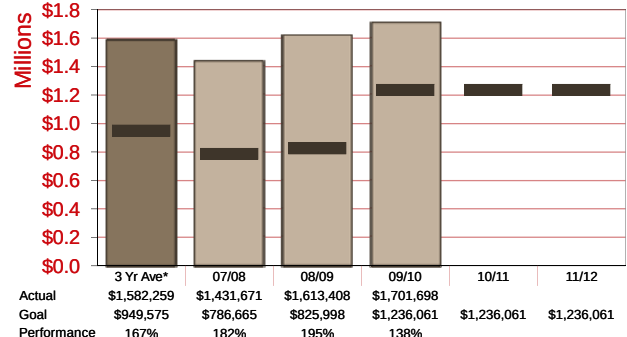
GOAL MATRIX DASHBOARD

Actual Goal

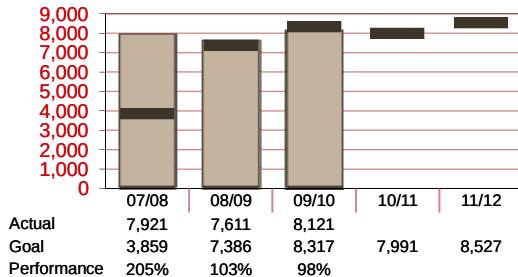
Gift Commitments



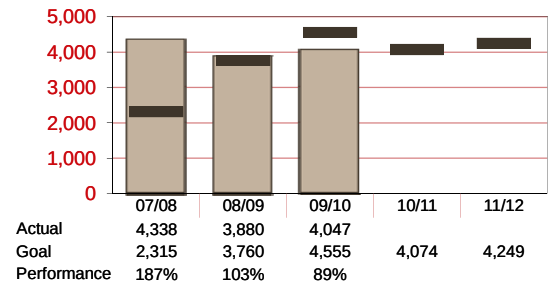
Total Advancement Investment



Number of Individual Donors



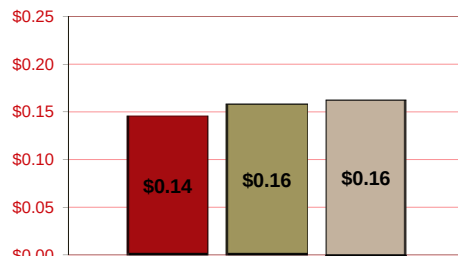
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

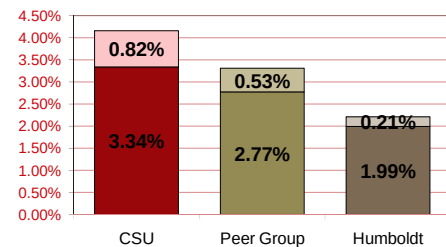
Cost Benefit Analysis

Cost to Raise a Dollar

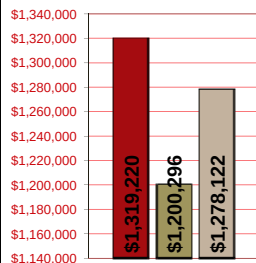


Investment as a Percentage of State General Fund

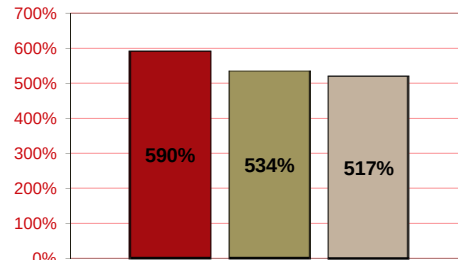
Total Advancement Expenditures



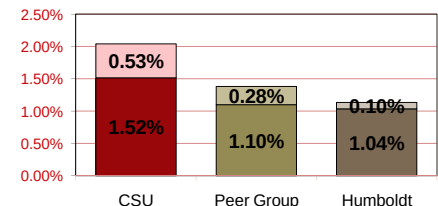
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

For the first time in a very long time, perhaps ever, Humboldt State University has in place the basic components of an advancement organization; a coordinated and quality Marketing and Communications Department; a Development and Alumni Relations Department with all the basic operations and programs one would expect at a quality university; and a philanthropic foundation that is now providing professional oversight of the endowment and other investments. The University's public radio station, overseen by advancement, also has a new level of professionalism and is on the path to financial sustainability.

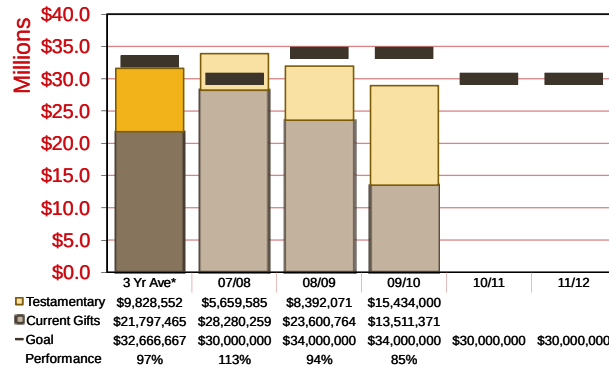
With a leadership transition underway, HSU must clarify the long-term course and corresponding level of investment in HSU's pursuit of philanthropic support. Philanthropy is one of HSU's best hopes for replacing declining state funding and augmenting excellence. In the meantime, the Advancement Division will continue to focus on the same three goals that have guided work for the last several years, with some revisions based on new information or circumstances.

1. Create a sustainable and robust fundraising operation.
2. Enhance HSU's reputation with the following audiences in order of priority; prospective students, alumni, families of current and prospective students, supporters, the campus community, the higher education community, and the local community.
3. Refine and begin implementation of plans to celebrate the centennial of HSU and to use that celebration to accelerate philanthropic support.

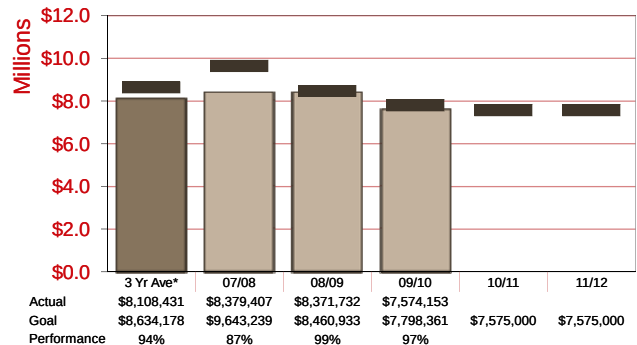
GOAL MATRIX DASHBOARD

Actual Goal

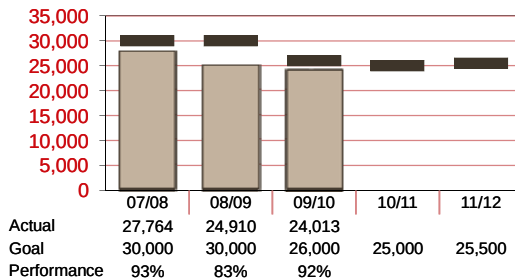
Gift Commitments



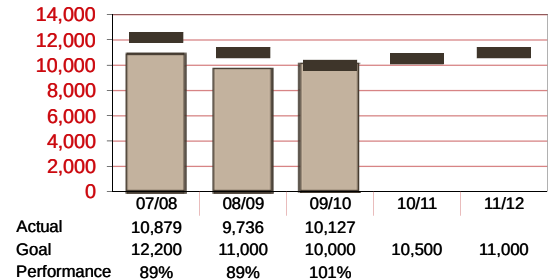
Total Advancement Investment



Number of Individual Donors



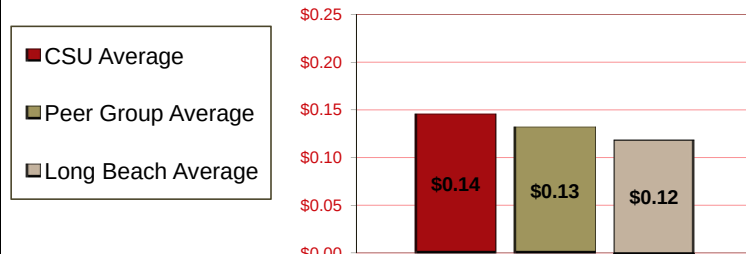
Number of Alumni Donors



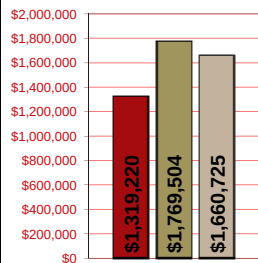
MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

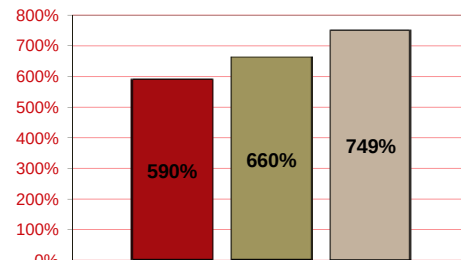
Cost to Raise a Dollar



Gift Commitments per FTE Fundraising Professional

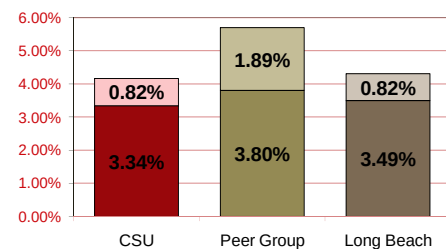


Net Return on Investment

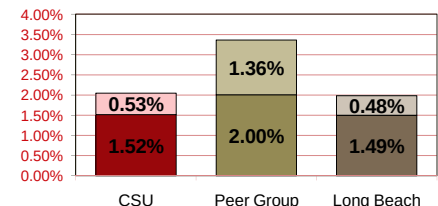


Investment as a Percentage of State General Fund

Total Advancement Expenditures



Fundraising Expenditures



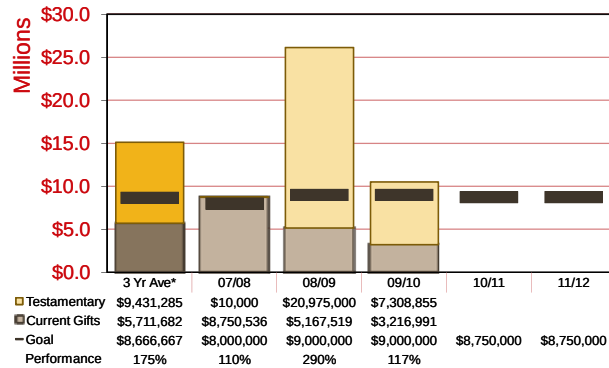
ENVIRONMENTAL SCAN / COMMENTS

Despite the state's slow economic rebound, California State University, Long Beach raised nearly \$29 million in 2009-2010, the third highest total in the university's history. In addition, CSULB's fundraising has increased by more than 43 percent over the last four years. There is more good news. In December the endowment reached \$43.2 million, a record high for CSULB. Additional fundraising positives include progress on CSULB's first comprehensive campaign. With a working goal of \$250 million, the campaign began in July 2007. In December 2010, the university had surpassed the \$100 million mark for the quiet phase of the campaign. Tremendous gains were realized in estate and gift planning. In 2010 CSULB received 28 revocable bequest intentions, four charitable gift annuities and one irrevocable bequest commitment. Also, there were seven matured estate distributions, making the total raised by Estate and Gift Planning more than \$10.4 million during 2010. Beyond its fundraising successes, CSULB continues to grow in prominence as a model institution of public higher education. In December President Alexander attended a signing summit at the White House to renew the Long Beach Promise. Under this initiative, the community's three education sectors promise all Long Beach students the opportunity to receive a college education. President Alexander also received the 2010 Robert C. Maxson President of the Year Award from the California State Student Association (CSSA). Each year, the CSSA selects one CSU campus president whose leadership reflects a commitment to the association's mission.

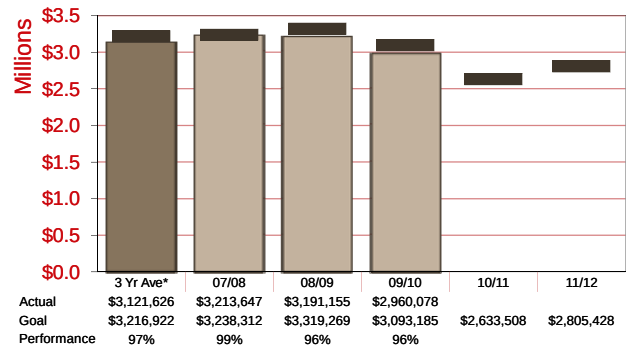
GOAL MATRIX DASHBOARD

Actual Goal

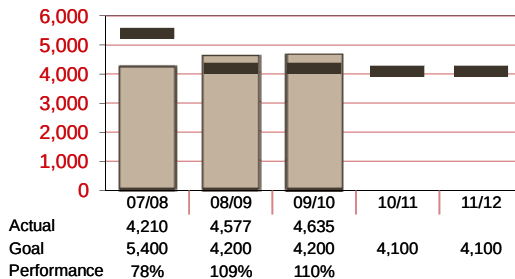
Gift Commitments



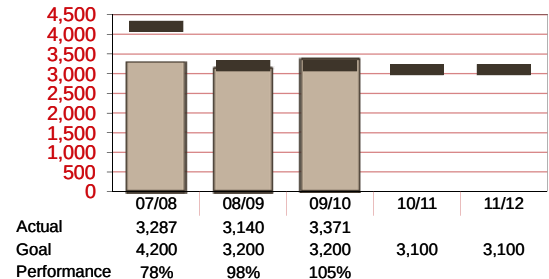
Total Advancement Investment



Number of Individual Donors



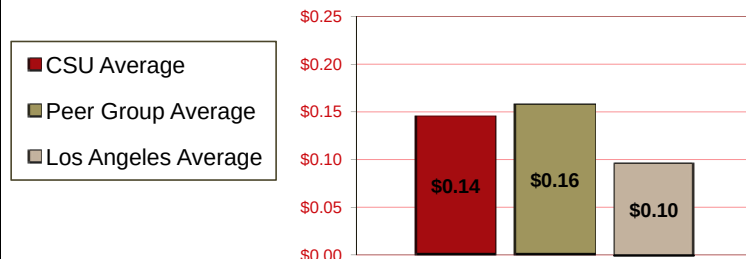
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

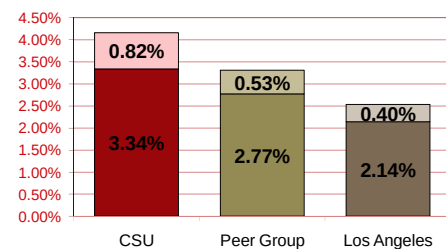
Cost Benefit Analysis

Cost to Raise a Dollar

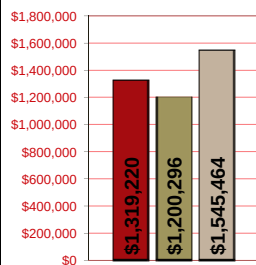


Investment as a Percentage of State General Fund

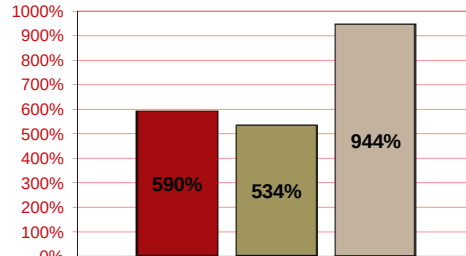
Total Advancement Expenditures



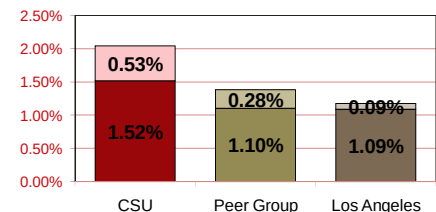
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

The University's Advancement Plan is an outgrowth of a comprehensive strategic planning process that takes into consideration opportunities to strengthen the University's efforts through private funding, public advocacy and an improved image. This plan employs strategies to help the University advance even in the face of the dramatic economic downturn in the nation and the state of California. Campus-wide development initiatives include the continuation of the capital and infrastructure initiatives begun in previous years, and the development of student aid and endowment resources with an emphasis on developing scholarships, endowment and planned gifts. A theme of "quality self-service," making increasing use of available technology has emerged across all Institutional Advancement offices as a way to help mitigate the current fiscal climate.

The Office of University Development endured some staffing challenges in FY 09-10 as several development director positions remained unfilled, due to budget cuts. With the arrival of a new provost on campus in fall 2010, fundraising priorities are being reviewed, although the focus on student aid, endowment and planned gifts will continue.

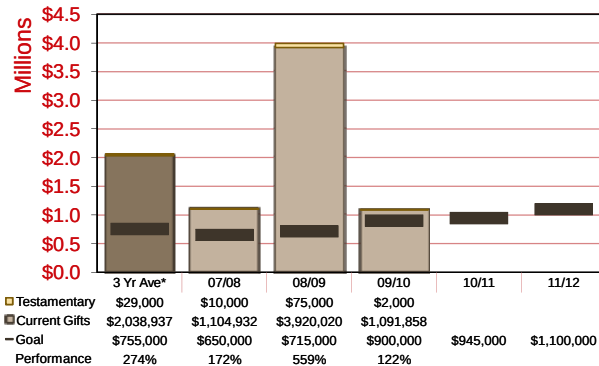
Last year, the Office of Public Affairs underwent several significant transitions simultaneously –expanding upon its communications methodologies and technologies, and broadening its set of responsibilities. Social media played an increasing role in the University's communications efforts.

To attract the interest and involvement of the University's diverse alumni and students, the Alumni Association grew the Alumni Mentoring Program, increased the reach and efficiency of its professional and social networking sites, while expanding volunteer mobilization, student leadership, and advocacy efforts.

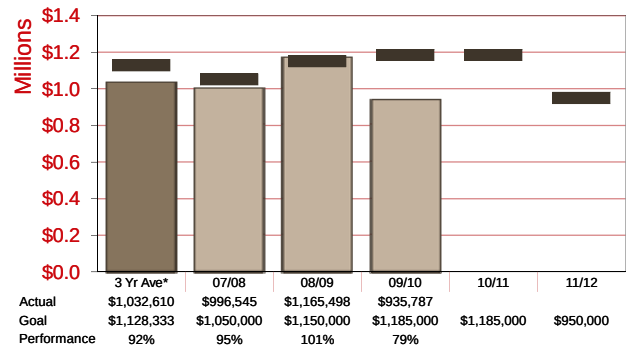
GOAL MATRIX DASHBOARD

Actual Goal

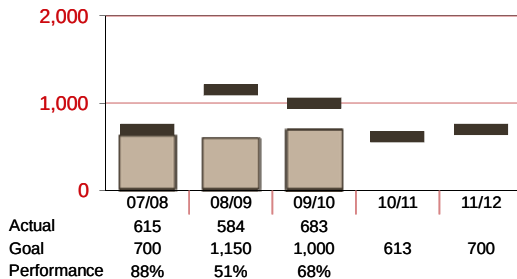
Gift Commitments



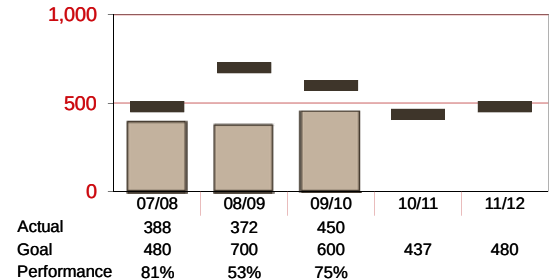
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors

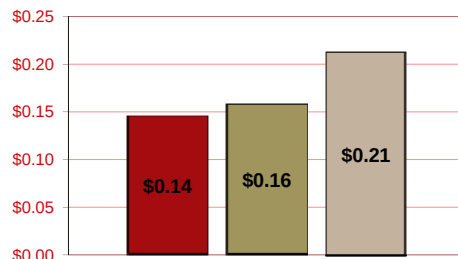


MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

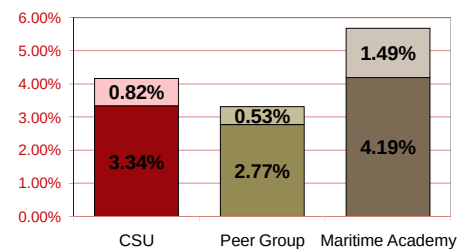
Cost to Raise a Dollar

CSU Average
Peer Group Average
Maritime Academy Average

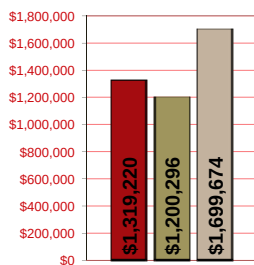


Investment as a Percentage of State General Fund

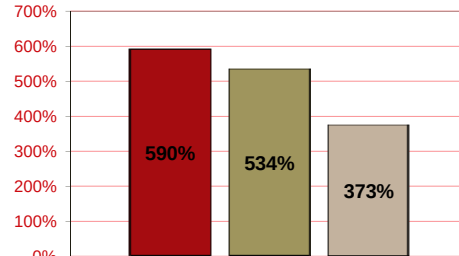
Total Advancement Expenditures



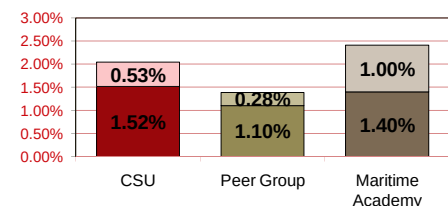
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

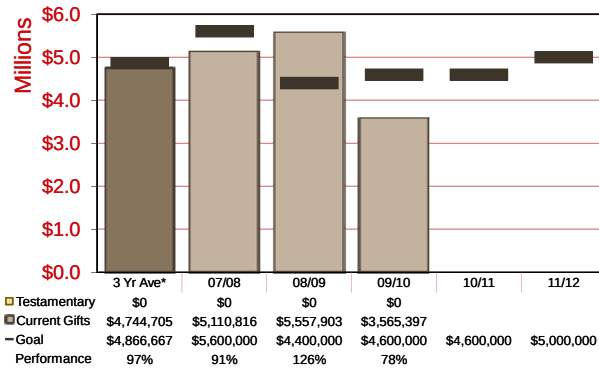
This past year saw the continued growth in the net charitable income generated by the Advancement department and the CMA Foundation. Our special events grew as did individual donations to capital and endowment. Further, we received as gifts two very valuable yachts that have been chartered, and were able to sell one yacht to support our outstanding cadet sailing team.

The driving factor behind this year's success was the recruitment of 6 strong new board members who, by themselves, have 'changed the conversation' about philanthropy on our campus.

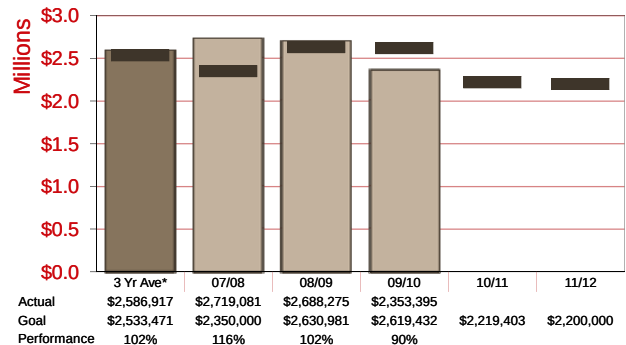
GOAL MATRIX DASHBOARD

Actual Goal

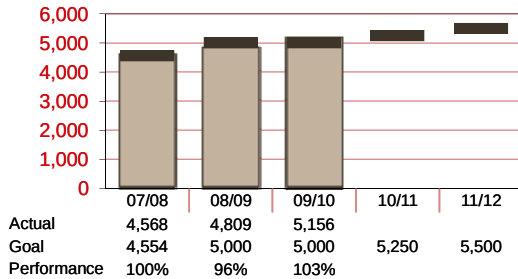
Gift Commitments



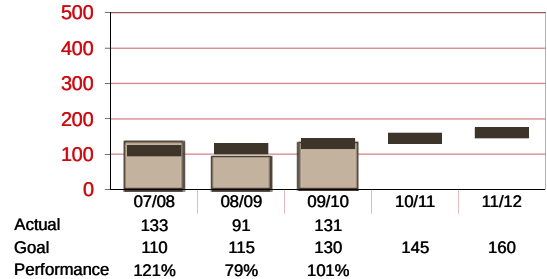
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors

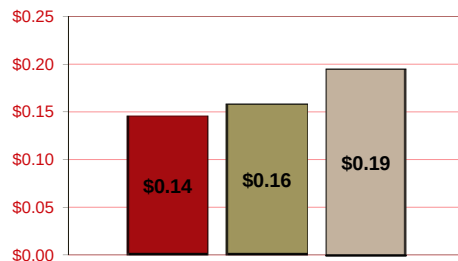


MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

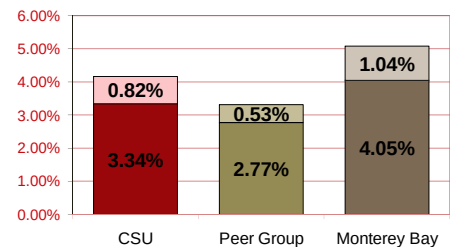
Cost to Raise a Dollar

CSU Average
Peer Group Average
Monterey Bay Average

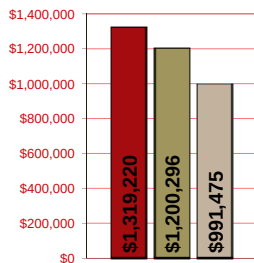


Investment as a Percentage of State General Fund

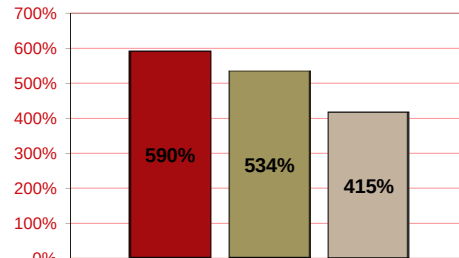
Total Advancement Expenditures



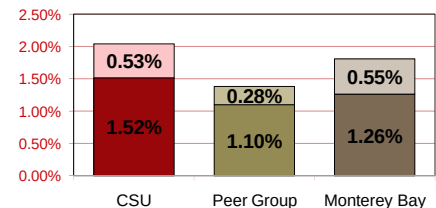
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



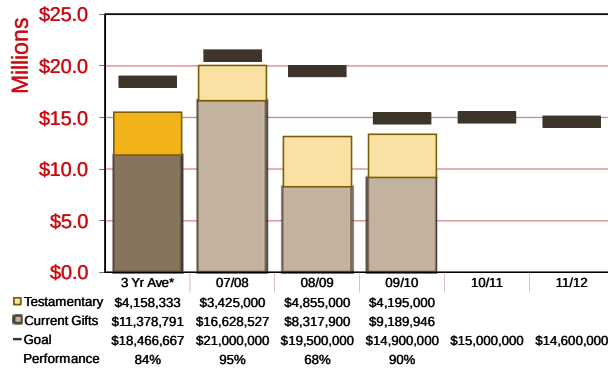
ENVIRONMENTAL SCAN / COMMENTS

Dr. Dianne Harrison has served as president of California State University, Monterey Bay since June 2006. Many accomplishments have marked her tenure, including strong enrollment growth, the addition of several new academic baccalaureate degrees and majors and new masters degree programs, recruitment of outstanding faculty, and a greatly improved physical campus for our students including the construction and opening of a new campus library, athletic fields, remodeled dining commons and landscaping. University Advancement has maintained its momentum through 2009-2010 despite challenges to include furloughs that resulted in 24 less staff workdays per employee in 2009-2010 and a fifteen percent reduction in operating funds. These budget impacts on advancement operations were compounded by the continuing economic downturn resulting in decreased individual wealth and an overall lack of willingness among prospects to commit large sums of money. CSU Monterey Bay Advancement is working hard during this period to continue cultivation of our longtime friends and bring new friends into university life. When we emerge from this economic downturn, we will have cultivated strong relationships with all of our donors so we can reap the rewards of a recovering economy. Programs such as the annual Donor Appreciation Dinner, Lifetime Giving Societies, the President's Circle, donor recognition throughout our media, and others are aimed at continuing stewardship and increasing inclusion.

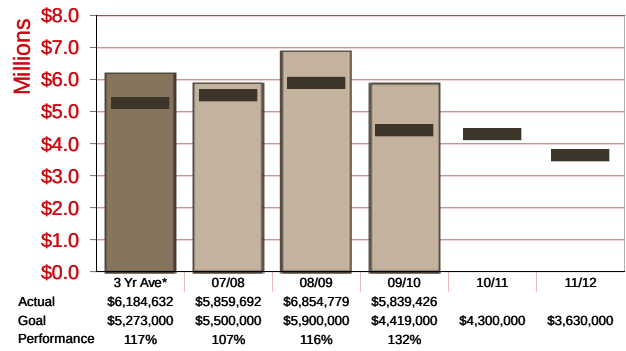
GOAL MATRIX DASHBOARD

Actual Goal

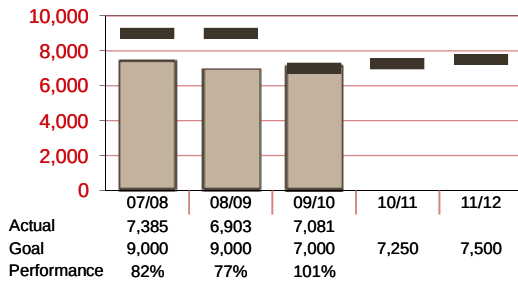
Gift Commitments



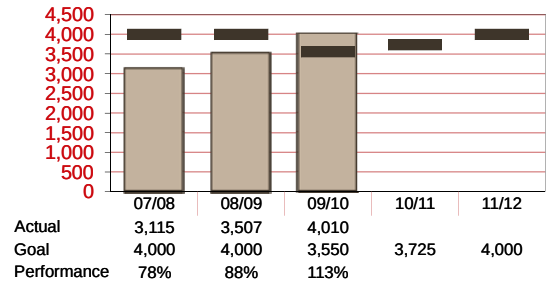
Total Advancement Investment



Number of Individual Donors



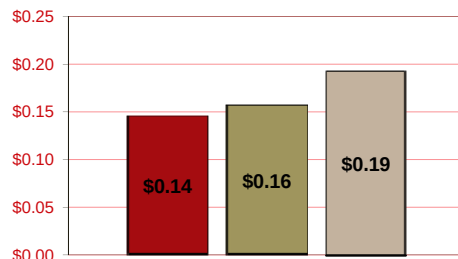
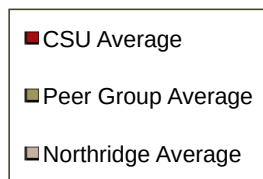
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

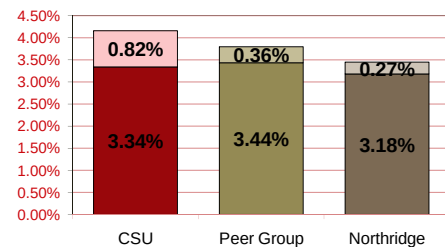
Cost Benefit Analysis

Cost to Raise a Dollar

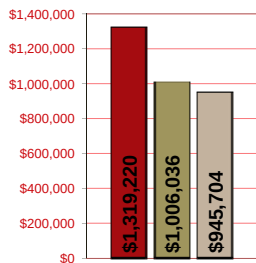


Investment as a Percentage of State General Fund

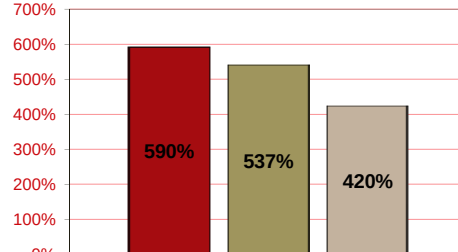
Total Advancement Expenditures



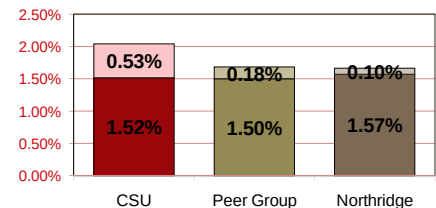
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

Global and regional economic conditions of the past 18 months negatively impacted fundraising productivity at Cal State University, Northridge in FY10, which experienced only a slight increase compared to FY09. The negative climate for fundraising continued to impact overall results. Staff reductions in early FY11, including layoffs of four professional development staff and consolidation of assignments threaten to suppress fundraising capacity and results even as economic activity improves and the philanthropic context brightens.

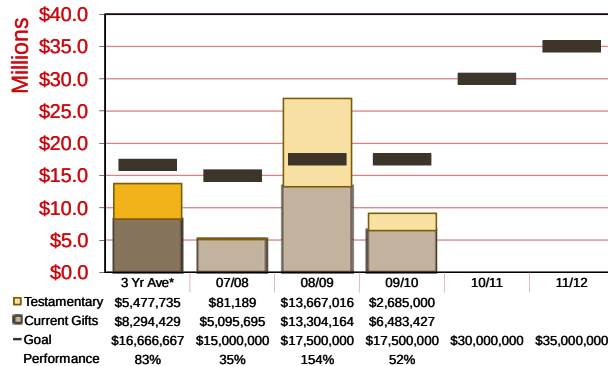
Program activity has continued to emphasize increased communications with alumni, friends, volunteers, donors and prospects to counter negative forces. This includes a combination of face-to-face, written, and electronic formats, with increased emphasis on the latter due to lower delivery cost. Efforts also have been made to sharpen awareness of the decline in state appropriations within the case for giving, pointing out that state funding at Northridge fell to 38% of consolidated operations in FY09-10.

Many strategies designed to strengthen annual giving, expand volunteer involvement, increase the use of video and social networking, and upgrade efforts to attract deferred gifts, have been sharply curtailed or abandoned.

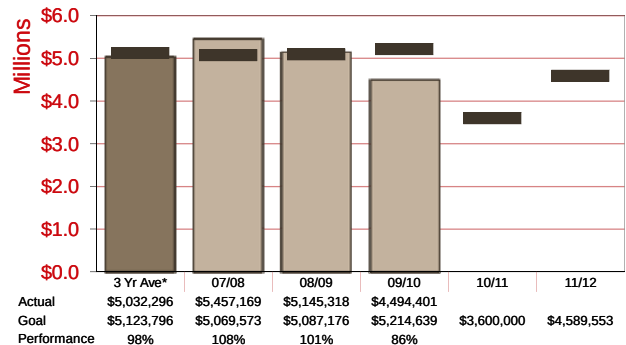
GOAL MATRIX DASHBOARD

Actual Goal

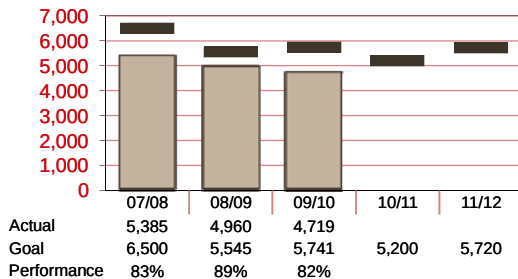
Gift Commitments



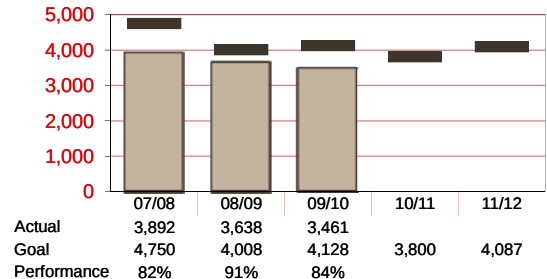
Total Advancement Investment



Number of Individual Donors



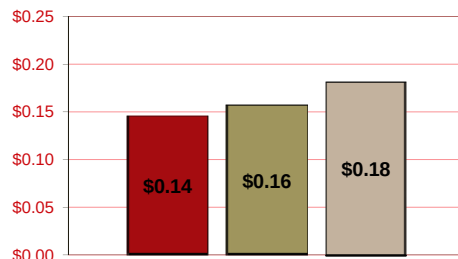
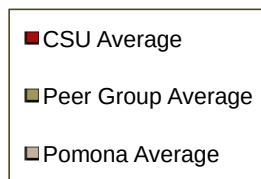
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

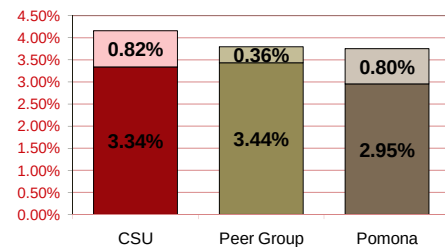
Cost Benefit Analysis

Cost to Raise a Dollar

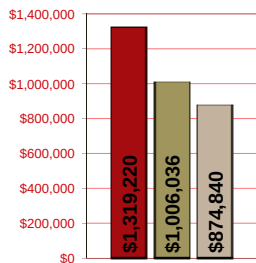


Investment as a Percentage of State General Fund

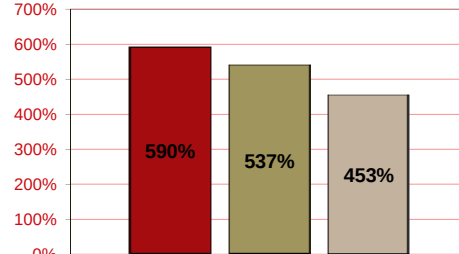
Total Advancement Expenditures



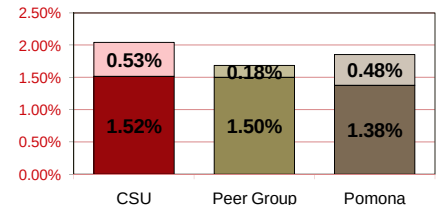
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



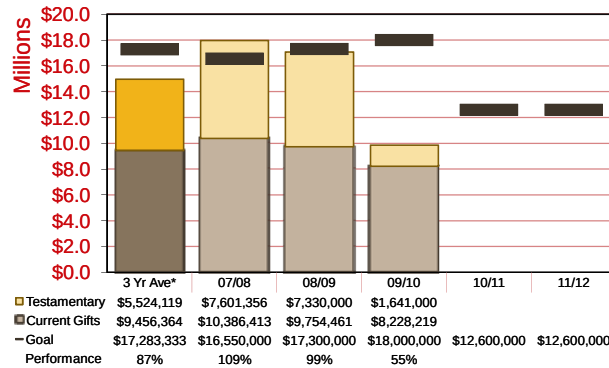
ENVIRONMENTAL SCAN / COMMENTS

For the past few years, Cal Poly Pomona has spent significant resources towards entering the public phase of its inaugural comprehensive campaign. This goal was formally realized in Fall 2010, following a \$42 million gift from The W.K. Kellogg Foundation, the largest single gift in CSU history. The success of the university's development efforts are more impressive considering the impact of budget cuts in the 2009-10 fiscal year. Despite the recognized priorities directly and indirectly associated with the comprehensive campaign, the division had taken the largest cut (28 percent) of any division at the university. These actions required division leadership to identify a narrowed and more strategic focus as it relates to development, communication, advancement services and alumni affairs.

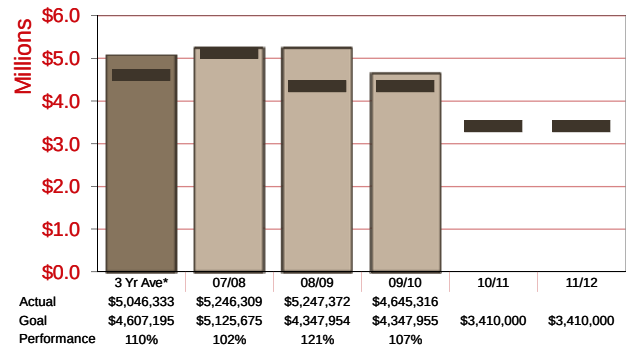
GOAL MATRIX DASHBOARD

Actual Goal

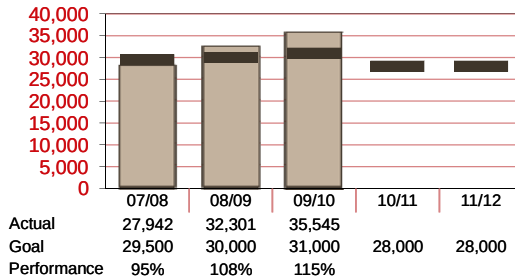
Gift Commitments



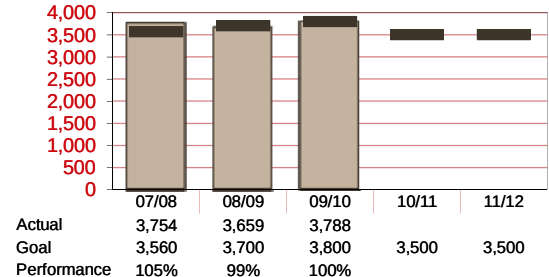
Total Advancement Investment



Number of Individual Donors



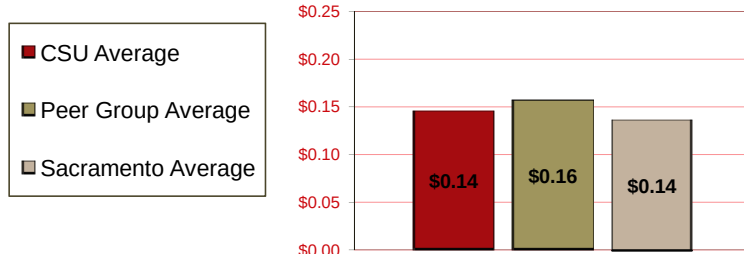
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

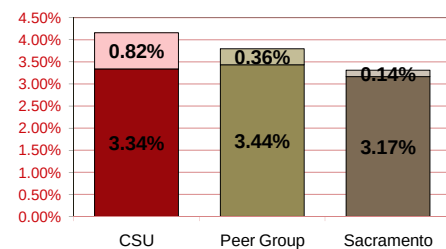
Cost Benefit Analysis

Cost to Raise a Dollar

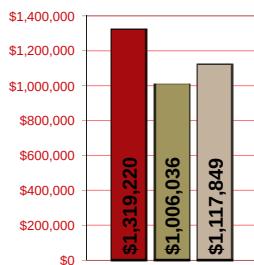


Investment as a Percentage of State General Fund

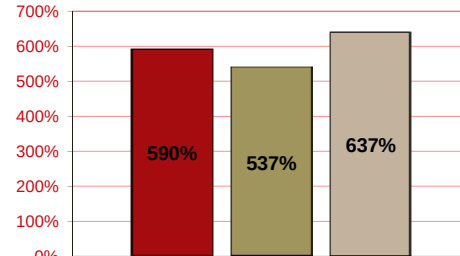
Total Advancement Expenditures



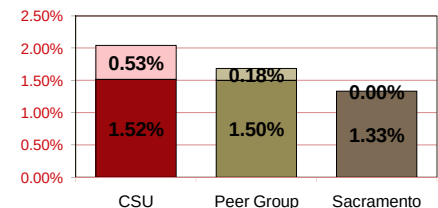
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

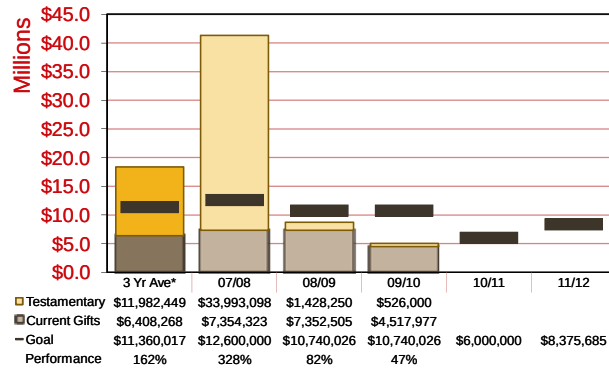
Alumni, businesses and friends of Sac State again showed their support for the University over the past year, providing nearly \$10 million in private contributions in spite of the economic downturn. The Sacramento State Alumni Association experienced an increase of 12 percent in paid members over the previous year.

This year also saw a change in alignment of the Advancement operation with the publications and strategic communications staff of the former Public Affairs department, forming a new University Marketing department which will promote the image of the University among alumni, current donors and prospective donors. The remaining Public Affairs functions merged with the Advocacy and Governmental Relations unit and will conduct the University's advocacy efforts.

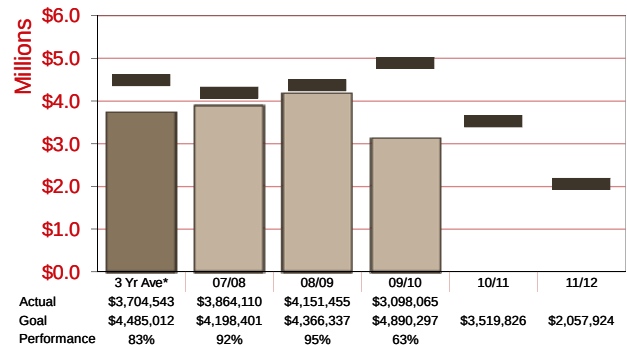
GOAL MATRIX DASHBOARD

Actual Goal

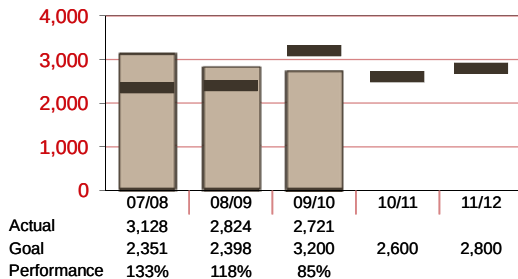
Gift Commitments



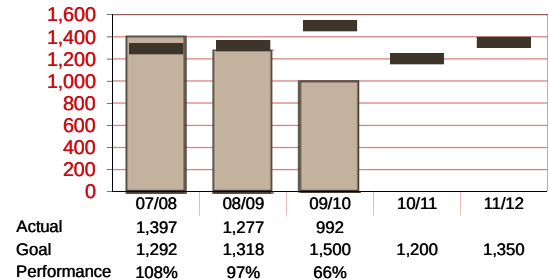
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

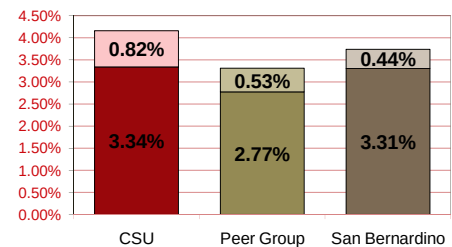
Cost Benefit Analysis

Cost to Raise a Dollar

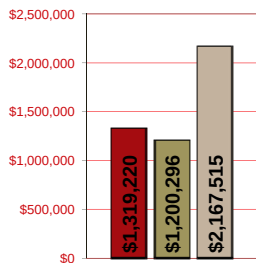


Investment as a Percentage of State General Fund

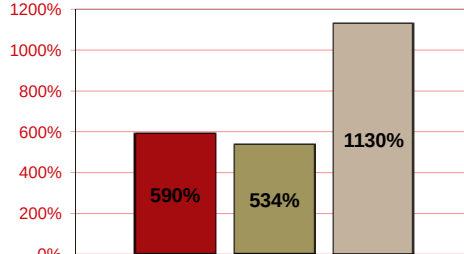
Total Advancement Expenditures



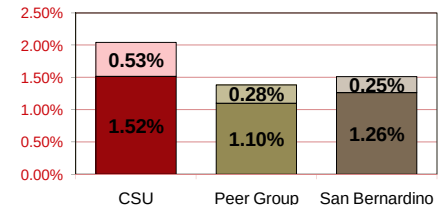
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



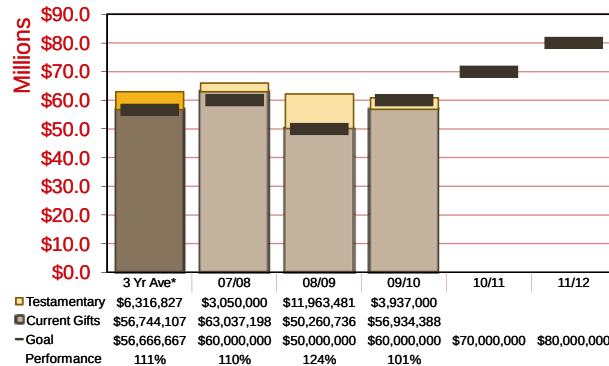
ENVIRONMENTAL SCAN / COMMENTS

At CSUSB University Advancement fundraising has declined over the last three years. In fiscal 2008-09, Advancement raised \$8,780,755. In 2009-2010, fundraising had declined to \$5,043,977; and through December 31, 2010, \$1,502,625 has been raised. Our annual goal is \$8.3 million. Fundraising declined as the campus grappled with budget cutbacks and furloughs, including unfilled vacancies in Corporate and Foundation Relations, Planned Giving, College of Natural Sciences, College of Education, Palm Desert Campus and Athletics. A transition in leadership in Advancement took place in September and a high priority has been assigned on filling vacancies of development officers. This is CSUSB's 45th anniversary; CSUSB is observing a low-key celebration of this anniversary and positioning itself for a comprehensive capital campaign in conjunction with its 50th anniversary. Preparation for the 50th anniversary campaign has begun with an assessment of our donors and donor records, evaluation of consultants to perform a campaign feasibility and readiness study, and determination of campaign goals and objectives. University Advancement continues to support the formation of a separate philanthropic foundation focused on philanthropy. We continue to build the Foundation Board of Governors with regional leaders, high-profile alumni and donors. The Foundation Board is currently at 68, and our target is up to 120 members. Our goal is not just to increase the number of board members but to raise the level and quality of board membership. Advocacy efforts are being increased at the state and local level, the Alumni Director is serving in a dual capacity as the Special Assistant to the President for External and Governmental Affairs and as Alumni Director. On the federal side, we are concerned about the possible loss of "earmarks" as a funding source for some project funding. The University is engaging in an aggressive student recruitment marketing effort to rebuild enrollment. To that end, the Office of Public Affairs is collaborating with Enrollment Management on outreach efforts, as well as exploring enhanced communications through the use of social media.

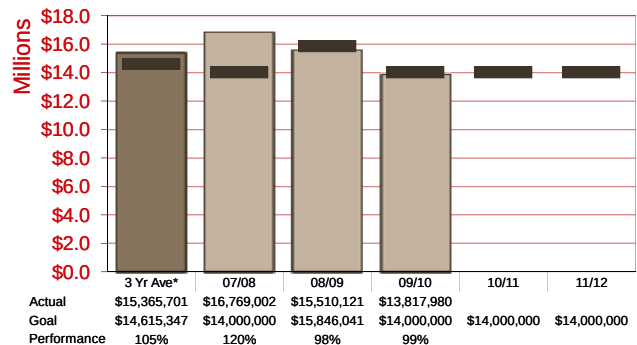
GOAL MATRIX DASHBOARD

Actual Goal

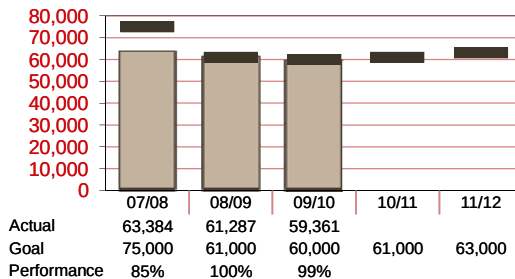
Gift Commitments



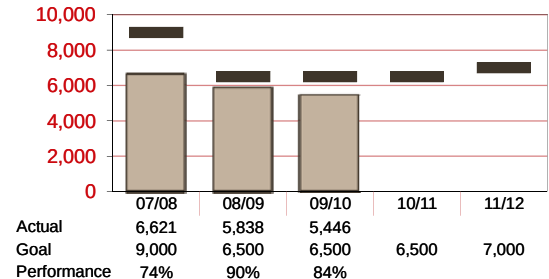
Total Advancement Investment



Number of Individual Donors



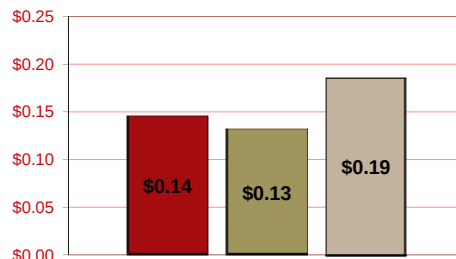
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

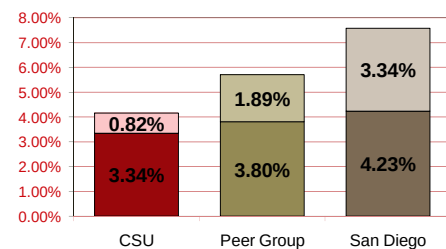
Cost Benefit Analysis

Cost to Raise a Dollar

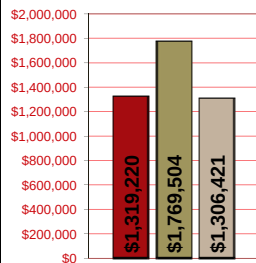


Investment as a Percentage of State General Fund

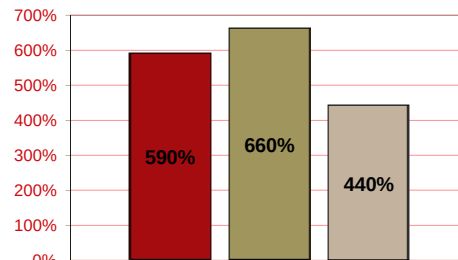
Total Advancement Expenditures



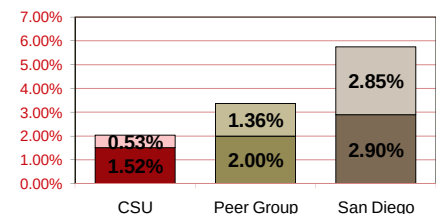
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

San Diego State University's donors continue to support the institution at a high level. For the fiscal year ending June 30, 2010, The Campanile Foundation, SDSU's philanthropic foundation, received \$65 million in cash and pledges. In July 2007, SDSU launched its first comprehensive fundraising campaign. As of June 30, 2010, the campaign had collected approximately \$195 million in gifts towards its \$500 million goal.

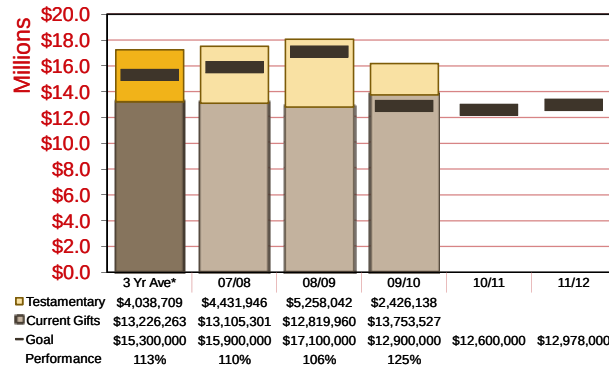
Highlights from FY 2010 included record support for Athletics and scholarships. SDSU's Athletics Department raised \$5.5 million, an increase of nearly 70 percent over the previous year. This support helped the department to meet its scholarship obligations in spite of annual fee increases. Similarly, donors responded positively to SDSU's "Fuel Potential" scholarship campaign, contributing \$8.1 million to support SDSU's neediest and most deserving students. The campaign far exceeded its \$5 million one-year goal. Another bright spot was the success of SDSU's new Parma Payne Goodall Alumni Center which opened in October 2009. Through December 2010, the PPG Alumni Center hosted 289 events and nearly 29,000 guests. The \$11 million facility, built entirely with private support, is a powerful symbol of the impact of philanthropy.

FY 2010 has not been without its challenges. Donors remained cautious. Both the state and national economies were fragile and the state's budget situation was (and continues to be) dire. Furloughs significantly reduced the amount of time available to staff for advancement activity. On the positive side, donors clearly understand the need – and many have responded.

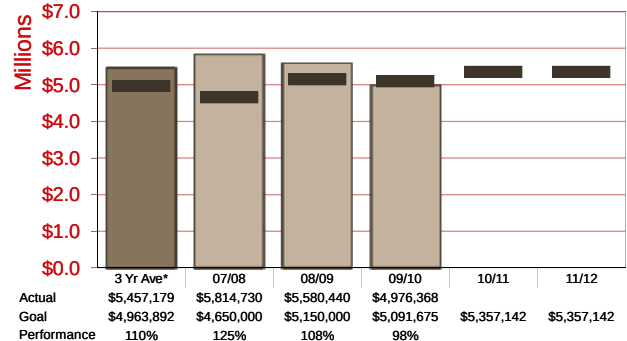
GOAL MATRIX DASHBOARD

Actual Goal

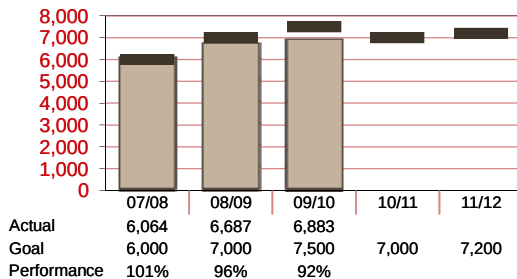
Gift Commitments



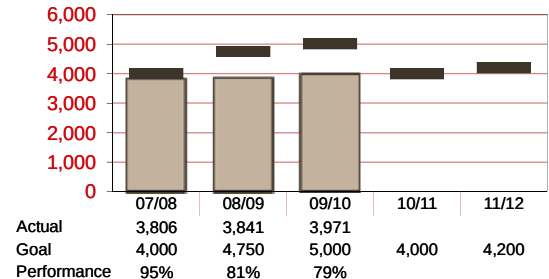
Total Advancement Investment



Number of Individual Donors



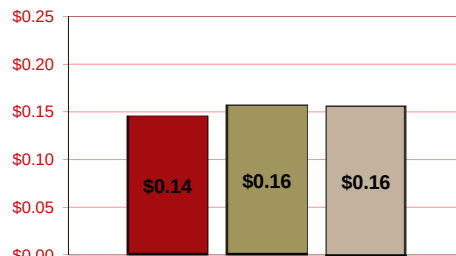
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

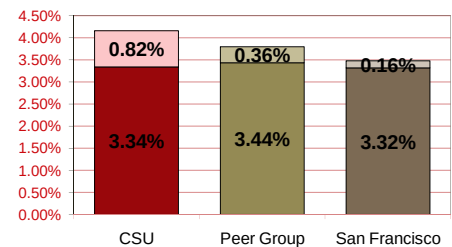
Cost Benefit Analysis

Cost to Raise a Dollar

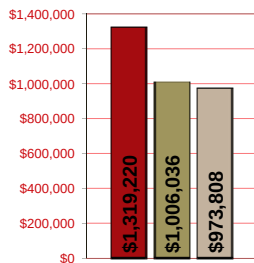


Investment as a Percentage of State General Fund

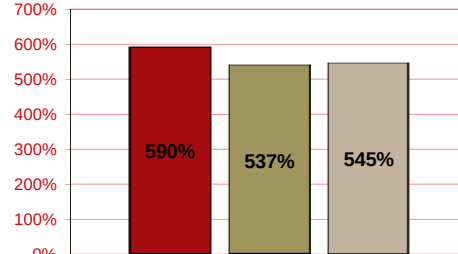
Total Advancement Expenditures



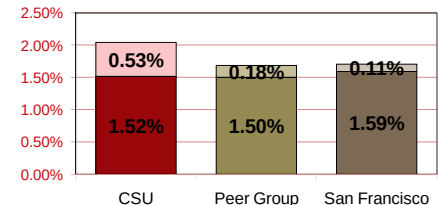
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

Progress toward building pride, recognition, and revenue successfully continues at SF State. Notable alumni, faculty and administrators continue to have national visibility and are featured in major news media to discuss important issues to SF State, the CSU, Higher Education and California. Our fundraising and advocacy efforts also resulted in enhanced communication with alumni, parents, and friends of SF State who not only make a financial contribution but also have demonstrated a willingness to advocate on behalf of higher education and the CSU. Although the total amount of gift commitments declined in FY 09/10 due to the economy, the number of alumni and individual donors continued to increase. Our FY 10/11 fundraising goal of \$12.6M reflects the challenge of a still-recovering economy, but our increased investment in planned giving will help greatly towards achieving this goal. Additionally, a recent executive leadership change will lead to a renewed focus on fundraising as we implement new processes to enhance the tracking of major prospects and management of gift solicitation efforts.

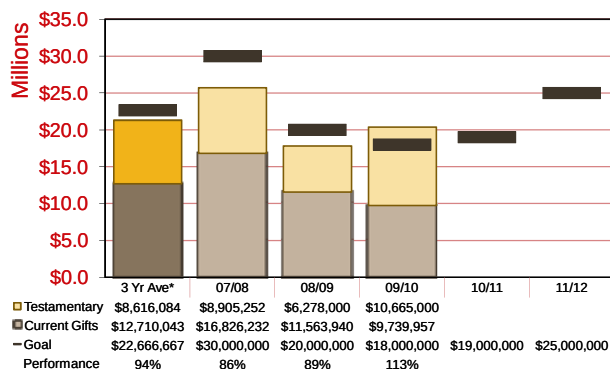
Goals: University Advancement has reached important milestones in an integrated five-year plan begun four years ago to:

- position the campus for a comprehensive campaign;
- brand the University and improve perception with key stakeholders;
- engage alumni, business leaders and elected officials as advocates and partners.

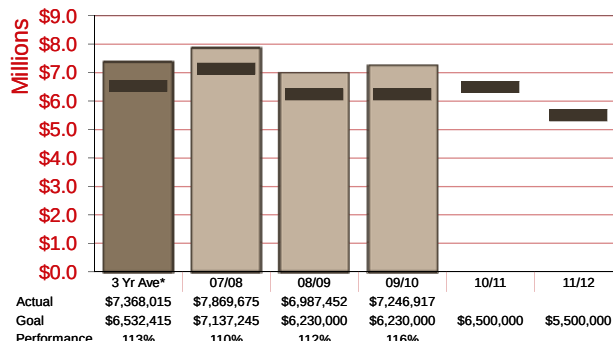
GOAL MATRIX DASHBOARD

Actual Goal

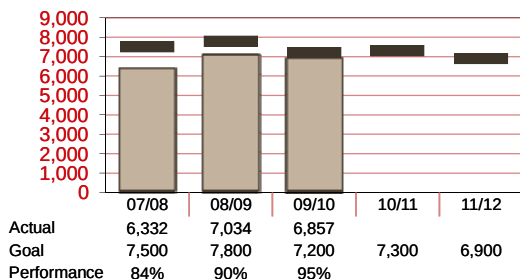
Gift Commitments



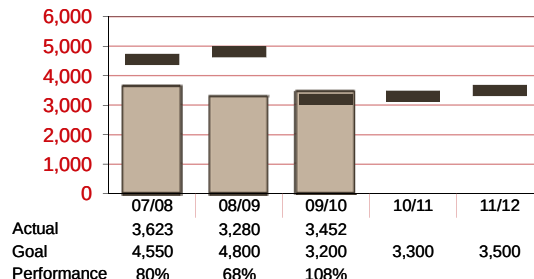
Total Advancement Investment



Number of Individual Donors



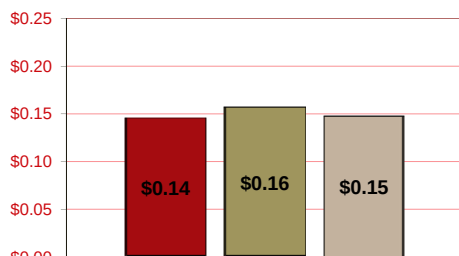
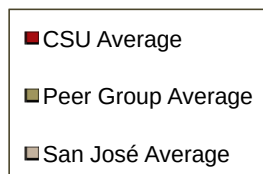
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

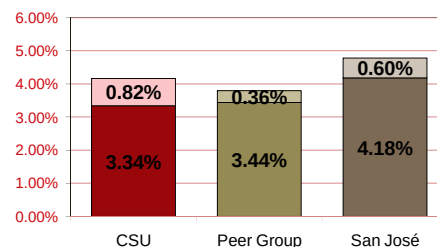
Cost Benefit Analysis

Cost to Raise a Dollar

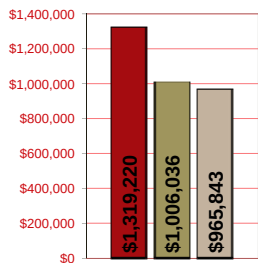


Investment as a Percentage of State General Fund

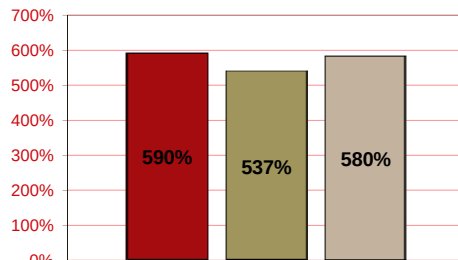
Total Advancement Expenditures



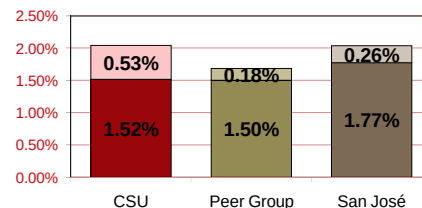
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

Since its founding in 1857, San José State University has been recognized for effectively training the workforce in Silicon Valley and throughout California. SJSU is comprised of over 25,000 students, 3,200 faculty and staff members, and 134 degree programs on a 154-acre downtown campus anchoring the nation's 10th largest city, San José. As the oldest campus in the California State University system, SJSU continues to build on its historic legacy, providing more than 7,000 well-prepared graduates last year.

Under the leadership of President Kassing and his senior cabinet, the \$200,000,000 comprehensive campus-wide campaign has entered its first year of the public phase. The Advancement Division played an integral role in this process, and over the past year, has made progress towards the goals articulated in the 2009-10 advancement plan. This progress is detailed more fully below.

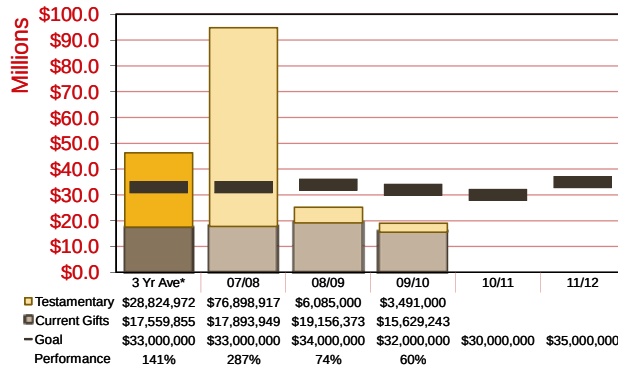
The Tower Foundation of San José State, our philanthropic foundation, was pleased to add four new board members to its board of directors during the past fiscal year. The new board members include Dr. Carmen Sigler, former SJSU Provost, dean and current foreign languages lecturer on campus; Amir Mashkoori, CEO of semiconductor firm, Kovio; David Weng, alum and general partner at InnoBridge Capital Management; and Dr. Michael Kaufman, physics and astronomy professor at SJSU as well as the chair of the academic senate.

The campus continues to prioritize one-time funding to support some personnel for the campaign.

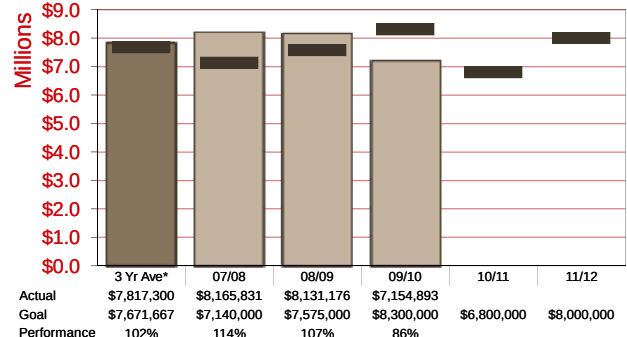
GOAL MATRIX DASHBOARD

Actual Goal

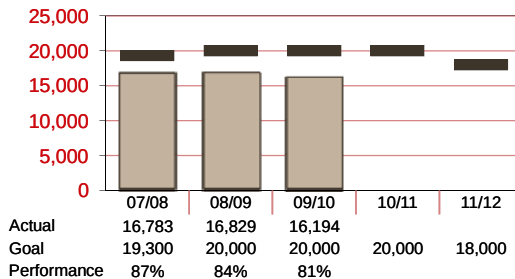
Gift Commitments



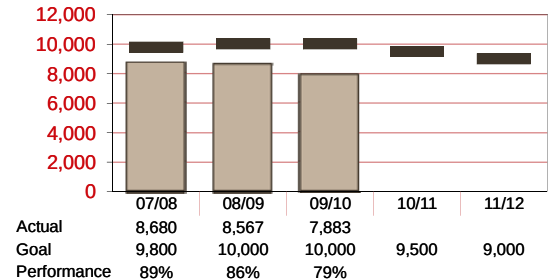
Total Advancement Investment



Number of Individual Donors



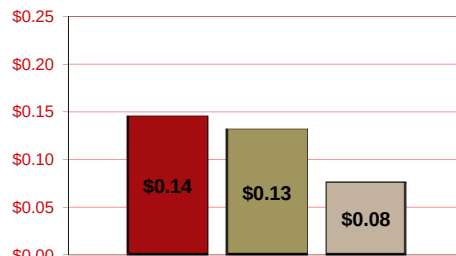
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

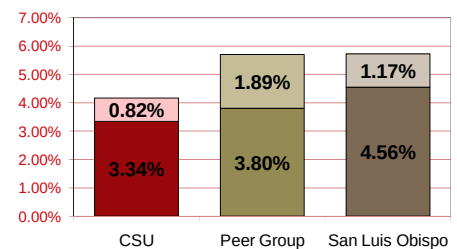
Cost Benefit Analysis

Cost to Raise a Dollar

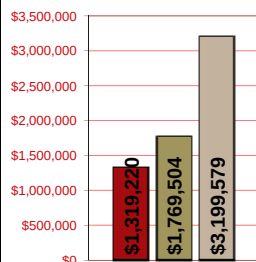


Investment as a Percentage of State General Fund

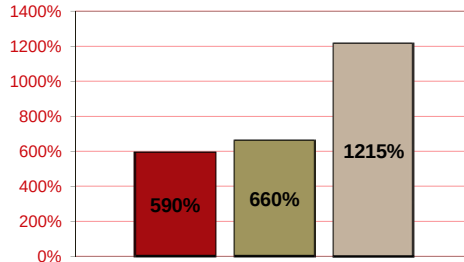
Total Advancement Expenditures



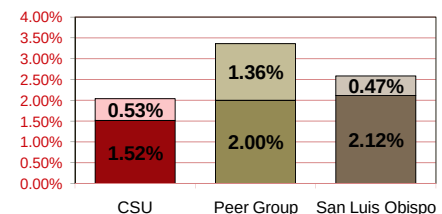
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

Despite unexpected events that disrupted several key initiatives in 2010, Cal Poly's Advancement team enters 2011 with momentum and genuine optimism. The major setbacks included the unexpected death of Vice President/Advancement Sandra Ogren, and the failure of the initial search for a successor to longtime President Warren Baker, who announced his retirement in December 2009. Nonetheless, the steady guidance from Interim President Robert Glidden and Interim VP/Advancement Robert Koob enabled the Advancement team to upgrade all key operational areas, set a record-year of in-person contacts and, with the full cooperation of the deans, shift the University from a highly de-centralized fundraising structure to a predominately centralized organization.

As a result, Cal Poly's Advancement team in 2011 will benefit from:

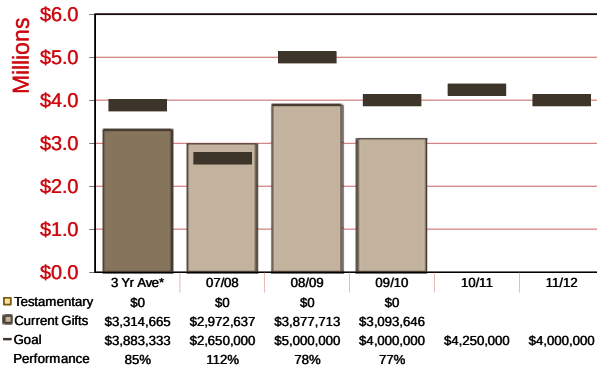
- A strengthened regional fundraising staff, now four, up from one in 2010.
- A more rigorous set of minimum standards, including a 50 percent increase per fundraiser in number of in-person contacts and proposals.
- Improved analytics to ensure better prospect research, management and stewardship.
- Improved fundraising communications in print and online.
- The full integration of the Alumni Affairs staff into Advancement operations.

In addition, recently appointed President Jeffrey D. Armstrong, who takes office on Feb. 1, has already committed to an aggressive schedule for personally engaging Cal Poly donors. Perhaps the most optimistic sign for 2011 is the renewed commitment and unprecedented collaboration of three key Cal Poly volunteer organizations -- the Foundation Board, the Alumni Association and the Parents Council.

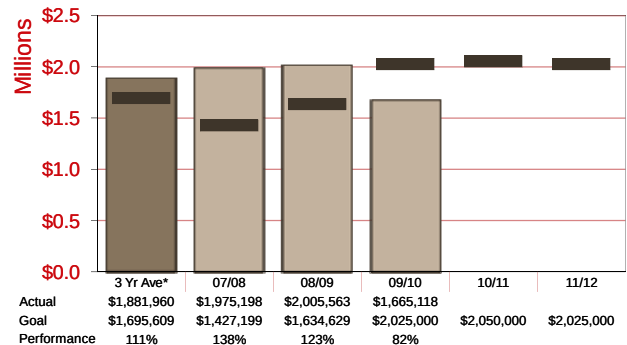
GOAL MATRIX DASHBOARD

Actual Goal

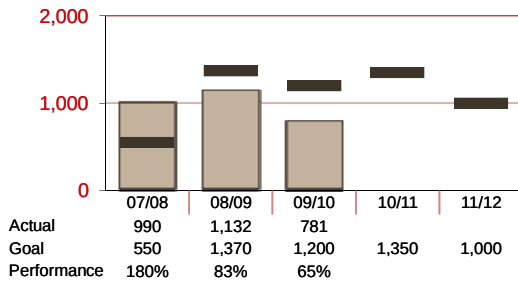
Gift Commitments



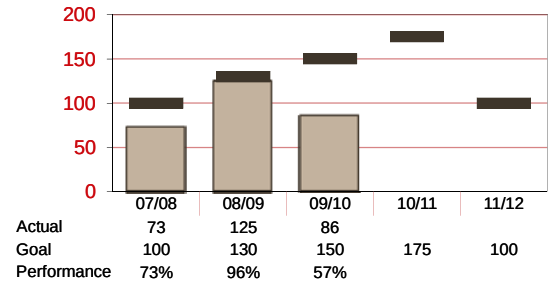
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors

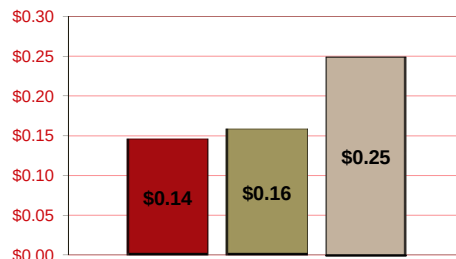


MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

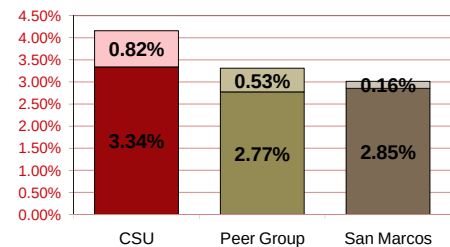
Cost to Raise a Dollar

CSU Average
Peer Group Average
San Marcos Average

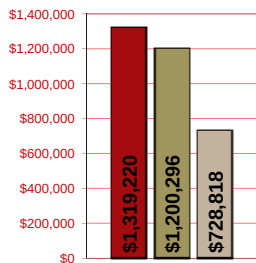


Investment as a Percentage of State General Fund

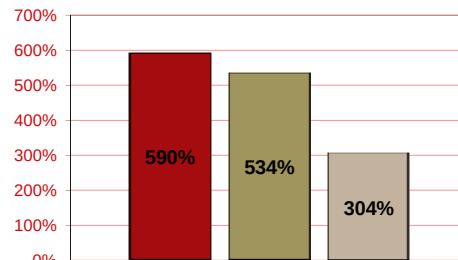
Total Advancement Expenditures



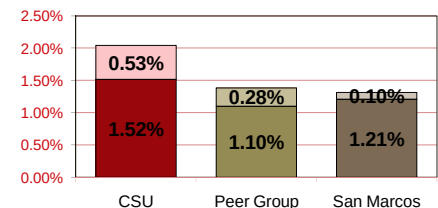
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

In 2010, University Advancement successfully set the stage for the next phase of growth in advancement outreach and donor support. Throughout the year, we leveraged our 20th anniversary celebration to spotlight university programs and activities and create greater awareness of the University's impact on the North San Diego County region. These activities included a 24-page special section in the North County Times, events designed to draw the community to campus such as the Platinum Ball, homecoming and faculty presentations. Efforts to further increase our profile in the region were strengthened by earning such recognitions as being named one of the nation's top universities for veterans (ranked 40) as well as being designated a military friendly school by G.I. Jobs magazine, being named Community Partner of the Year in Education by San Diego North Economic Development Council, and CSUSM President Karen Haynes was named Most Admired CEO in Education by the San Diego Business Journal.

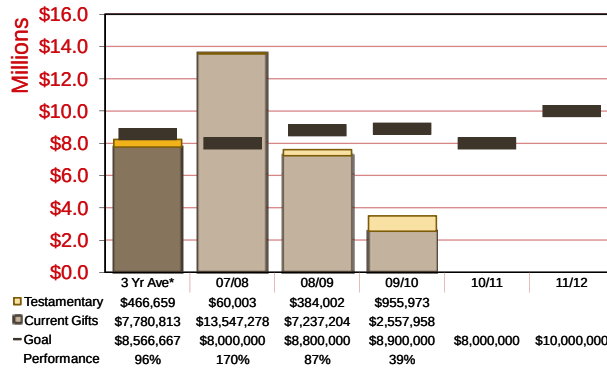
Additionally, University Advancement established the California State University San Marcos Foundation board as its primary philanthropic entity and began to grow its membership with the business, community, and philanthropic leaders it will need in the coming years. The Foundation board, its committees, and other campus advisory councils provide University Advancement with a strong framework for critically important volunteer engagement.

While budget uncertainty remains and donor confidence in the economy may impact attitudes toward giving, it is clear that marketing, outreach, and developing friendships in the community are the right pathways to strengthening the university and advancing its initiatives.

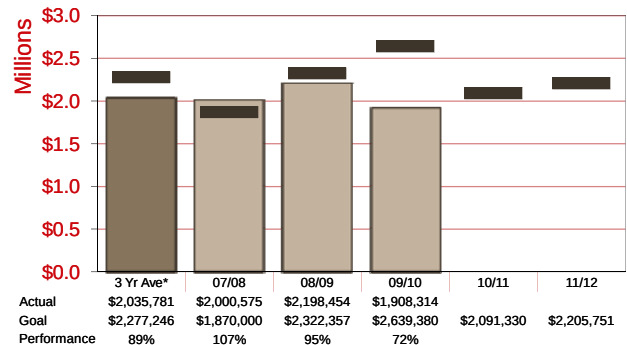
GOAL MATRIX DASHBOARD

Actual Goal

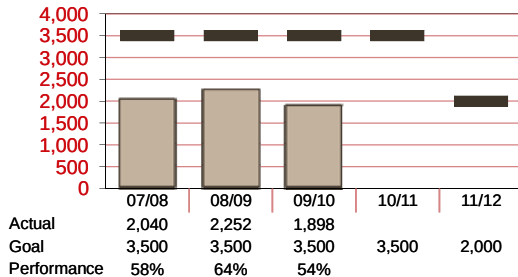
Gift Commitments



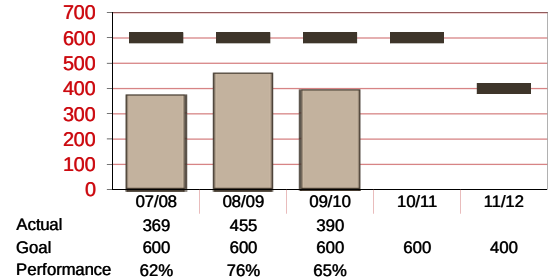
Total Advancement Investment



Number of Individual Donors



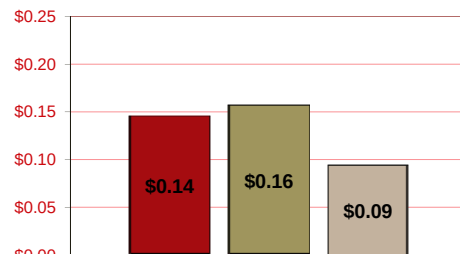
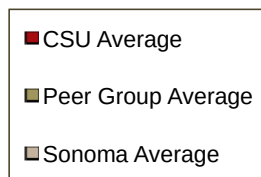
Number of Alumni Donors



MEASURING ADVANCEMENT (Three Year Average*)

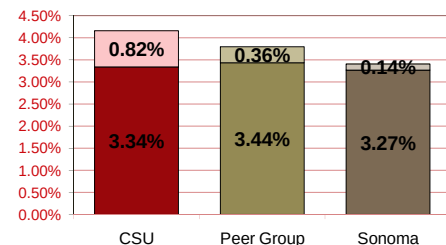
Cost Benefit Analysis

Cost to Raise a Dollar

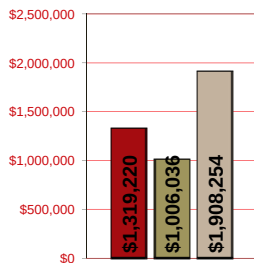


Investment as a Percentage of State General Fund

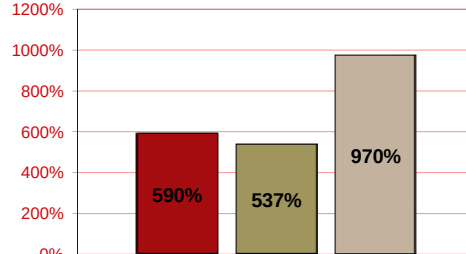
Total Advancement Expenditures



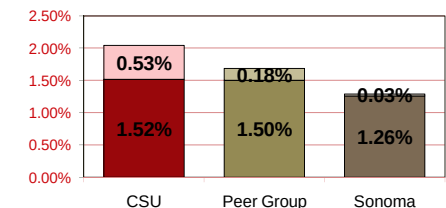
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



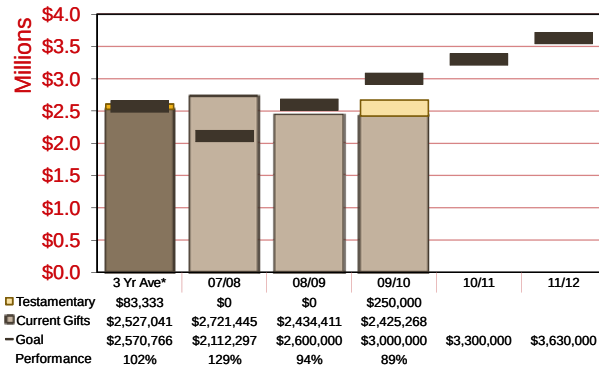
ENVIRONMENTAL SCAN / COMMENTS

The University has an excellent regional academic reputation. This past year has been a good one; leaving behind the previous year's public controversies. Strong efforts continue to be made within University Affairs and throughout the campus to promote that excellence. The media used to play a major role in outreach efforts. Two issues surround the media: 1) it is not possible to control topics or content, and 2) the media in general is suffering cutbacks on staff and news holes. "If it bleeds, it leads" is more prevalent today than ever before. Positive stories are still pursued by SSU's media relations team (of one), but we hear less and less about interest in covering positive stories. Additionally, the media outlets in Sonoma County and the North Bay are few. There is one daily newspaper that has done well with their online version, weeklies in most towns, no television, and radio that like many small stations, are "rip and read." San Francisco television will travel an hour or so north only on rare occasions due to their own budget constraints of time and money. SSU no longer relies heavily on media to get messages out. Direct marketing through social media, websites, and email have become priorities and where the majority of outreach efforts are made. The University Affairs Division believe the time has come to begin a comprehensive marketing and branding program which has never been done in the campus' almost 50 years. As with many universities, Sonoma has grown in a decentralized fashion. Schools and departments often work on their own to develop messages, publications and marketing. A university poised to meet the needs of a 21st century high education needs and expectations must work toward centralized, coordinated messaging, marketing and communications. Given the emerging budget picture for 2011-12, this effort may be stalled.

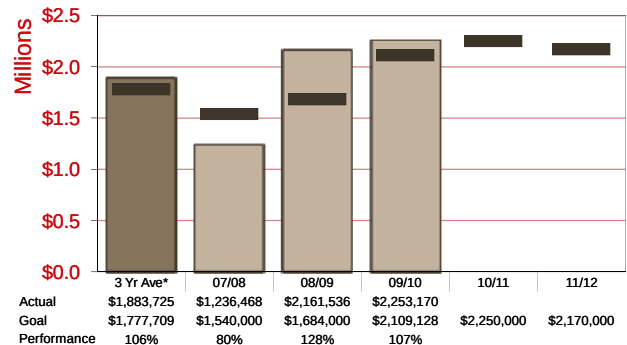
GOAL MATRIX DASHBOARD

Actual Goal

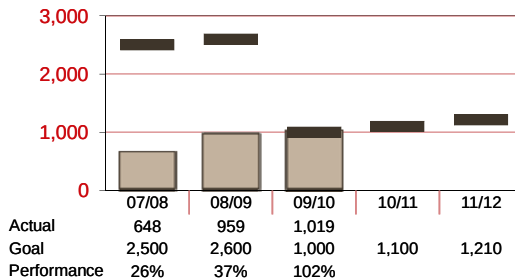
Gift Commitments



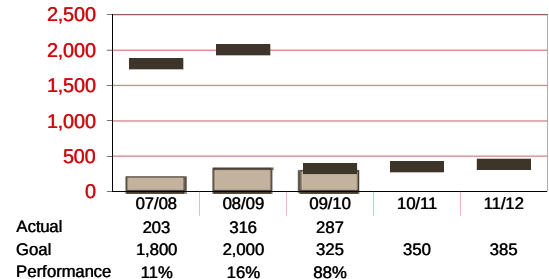
Total Advancement Investment



Number of Individual Donors



Number of Alumni Donors

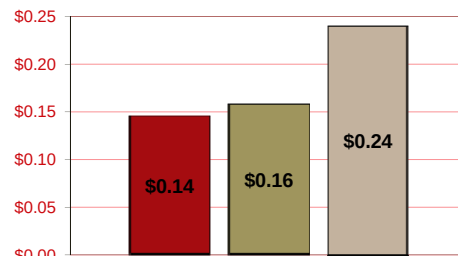


MEASURING ADVANCEMENT (Three Year Average*)

Cost Benefit Analysis

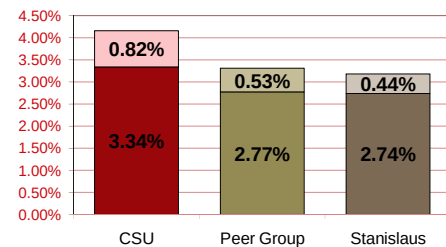
Cost to Raise a Dollar

CSU Average
Peer Group Average
Stanislaus Average

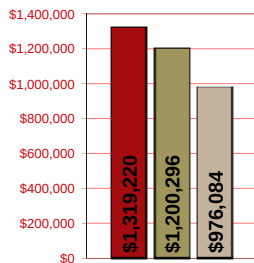


Investment as a Percentage of State General Fund

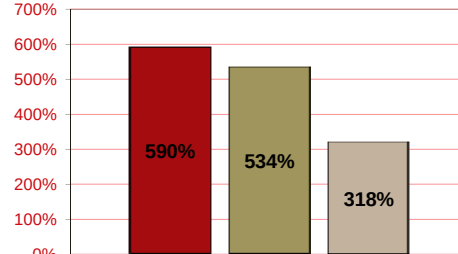
Total Advancement Expenditures



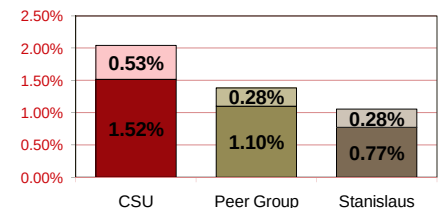
Gift Commitments per FTE Fundraising Professional



Net Return on Investment



Fundraising Expenditures



ENVIRONMENTAL SCAN / COMMENTS

Despite difficult economic times, University Advancement remains focused on its core mission of developing resources for the University's programs and students. This determination resulted in several highly-visible major gifts last year (four endowed chairs, a named arena, and a successful Presidential Scholarship drive). To build upon the momentum created by these gifts, 2011-2012 will be a year of launching several strategic major-gift initiatives. The campus is now poised for the next phase of development and University Advancement is prepared to contribute to this progression.

University Advancement consistently evaluates and refines its organizational structure to achieve optimal performance. Several refinements made in early 2011 have resulted in the hiring of an Associate Vice President for Communications and Public Affairs and a Director of Legislative, Corporate and Foundation Relations. Both individuals come with a wealth of knowledge and prior university experience. Our efforts to integrate Advancement throughout the University and build upon a culture of philanthropy continue to be realized. We continue to expand alumni engagement through outreach and development as well as key events to reconnect alumni.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Council for Advancement and Support of Education Awards

Presentation By

Garrett P. Ashley
Vice Chancellor
University Relations and Advancement

Summary

This information item acknowledges California State University recipients of the 2011 Council for Advancement and Support of Education (CASE) Awards of Excellence. The awards were given by CASE District VII, which encompasses Arizona, California, Guam, Hawaii, Nevada and Utah.

Background

Each year, CASE honors superior achievement in the field of university advancement. At this year's CASE District VII Conference, 12 CSU campuses and the Chancellor's Office were recognized for outstanding communications and best practices in advancement.

California State University, Chico

- Bronze in Special Program Publications Packages: *"The Chico Experience Week"*
- Bronze in Excellence in Design Specialty Pieces: *"Gateway Science Museum Banners"*
- Silver in Individual Public Relations and Community Relations Projects: *"The Chico Experience Week"*
- Silver in Excellence in Design Invitations: *"Gateway Science Museum Grand Opening Invitation"*
- Silver in Individual Special Events: *"Unveiling of the Jake Early Chico Experience Print"*
- Silver in Complete Institutional Web Sites: *"CSU, Chico Web site"*
- Silver in Advertising Campaign: *Gateway Science Museum Grand Opening"*
- Gold in Individual Photography: *"Chico Statements, Fall 2009 Cover Photo for Feature on Wildcat Recreation Center"*
- Gold in Excellence in Design Posters: *"The Jake Early Chico Experience Week Poster"*
- Gold in Excellence in Design Specialty Pieces: *"The Chico Experience Week Pocket Media Guide"*
- Gold in Fundraising Programs Stewardship: *"Turner Donor Recognition"*

California State University, Dominguez Hills

- Silver in Year-Long Special Events: *“CSU Dominguez Hills 50th Anniversary Celebration”*

California State University, Fresno

- Bronze in Individual Special Events: *“Centennial Homecoming Weekend”*

California State University, Fullerton

- Bronze in Relations Revenue-Generating Programs: *“Cal State Fullerton Alumni Association Wine Tasting 2010”*
- Silver in Alumni Relations Creative Uses of Technology and New Media: *“Tuffy Tuesday”*

Humboldt State University

- Silver in Special Program Publications Packages: *“Parents and Family Program at Humboldt State University”*
- Silver in Photographer of the Year: *“Kellie Jo Brown”*

California State University, Long Beach

- Silver in Creative Uses of Technology and New Media: *“2009 Holiday E-Greeting Card”*
- Gold in Advancement Services Programs Prospect Research: *“Could There Possibly Be a Magic Button in Research?”*
- Gold in Alumni Relations New Program Initiatives: *“GOLDen Graduates Program”*

California State Polytechnic University, Pomona

- Bronze in Collaborative Fundraising: *“Partnering with Annual Fund”*
- Bronze in Special Constituency Magazines Specialty Interest Magazines: *Cal Poly Pomona, “Collins”*
- Bronze in Creative Uses of Technology and New Media: *“PolyCentric Online News”*
- Silver in Individual In-House Publications Periodicals: *“Panorama Magazine”*
- Silver in Periodical Staff Writing for Internal Audiences: *“PolyCentric News Stories”*
- Silver in Excellence in News Writing: *“PolyCentric News Stories”*
- Silver in Video Fundraising Features: *“This is Cal Poly Pomona”*

California State University, San Bernardino

- Bronze in Alumni Relations Collaborative Programs: *“Coyote Careers”*

San Diego State University

- Silver in General Interest Magazine 30,000 to 74,999 Circulation: “*The Magazine of San Diego State University*”
- Gold in Excellence in Design Covers: “360 – *The Magazine of San Diego University*”
- Gold in Video PSAs and Commercial Spots: “*Aztec for Life*”

San Francisco State University

- Gold in Individual In-House Publications: “*The San Francisco State of Mind*”

San José State University

- Silver in Individual Fundraising Publications: “*San José State University 2009-2010 Donor Honor Roll and Tower Foundation Annual Report*”

Sonoma State University

- Silver in Excellence in Design Posters: “*School of Performing Arts, Department of Theater Arts & Dance Poster Campaign*”

Office of the Chancellor

- Bronze in Advancement Services Programs Overall Operations: “*Measuring Advancement*”