

AGENDA

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Meeting: 1:15 p.m., Tuesday, January 27, 2014
Glenn S. Dumke Auditorium

Steven M. Glazer, Chair
Douglas Faigin, Vice Chair
Roberta Achtenberg
Debra S. Farar
Margaret Fortune
Hugo N. Morales
J. Lawrence Norton
Steven G. Stepanek

Consent Items

Approval of minutes of meeting of November 12, 2014

Discussion Items

1. Annual Report on Philanthropic Support for 2013-2014, *Action*
2. Naming of a Facility—San Francisco State University, *Action*

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

November 12, 2014

Members Present

Steven M. Glazer, Chair
Roberta Achtenberg
Douglas Faigin
Debra S. Farar
Margaret Fortune
Lou Monville, Chair of the Board
Hugo N. Morales
J. Lawrence Norton
Steven G. Stepanek
Timothy P. White, Chancellor

Trustee Glazer called the meeting to order.

Approval of Minutes

The minutes of September 9, 2014, were approved as submitted.

Naming of a Facility – California State Polytechnic University, Pomona

Mr. Garrett P. Ashley, vice chancellor for university relations and advancement, reported that the proposed naming recognizes the \$2.5 million total contribution by Ronald W. Gregoire to complete funding for the new College of Business Administration complex at Cal Poly Pomona.

President J. Michael Ortiz and Chancellor White thanked Dr. Gregoire for his generous support, which will help Cal Poly Pomona meet the needs of current and future students in the College of Business through innovative learning spaces, as well as his leadership on the \$150 million Campaign for Cal Poly Pomona.

The committee unanimously recommended approval by the board of the proposed resolution (RIA 11-14-08) that the College of Business Administration Classroom Building 163 at California State Polytechnic University, Pomona be named as Ronald W. Gregoire Hall.

The Class of 3 Million

Mr. Ashley shared that the California State University has reached a special milestone by exceeding 3 million living alumni. To communicate the social and economic value of CSU alumni, the Class of 3 Million celebration has been launched to run this academic year culminating with Commencement 2015.

Mr. Aaron Moore, director, alumni relations, provided an overview of the Class of 3 Million celebration and how the CSU can use it to further engage alumni in support of the CSU mission.

- The Class of 3 Million campaign highlights the impact of CSU graduates in everyday life and is a chance to involve all our faculty and staff—many of whom are alumni—in celebrating the achievements of the students they helped to educate.
- This is an opportunity to show the impact of the CSU in California, throughout the country and the world, with one out of every 20 Americans with a college degree receiving it from the CSU, and an alumni family larger than the population of 20 U.S. states.
- The centerpiece of the celebration is the Class of 3 Million online yearbook, which is a place where alumni can claim their spot in the celebration, network with other alumni, and become re-engaged or further engaged with their campus.
- Valuable data is collected and shared with campuses to use in furthering their alumni and philanthropic activities.
- Three ways to get involved in the Class of 3 Million are to create an alumni profile on the online yearbook, promote the campaign using #CSU3mil, or give thanks to a faculty or staff member with #ThanksCSU.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Annual Report on Philanthropic Support for 2013-2014

Presentation By

Garrett P. Ashley
Vice Chancellor
University Relations and Advancement

Lori A. Redfearn
Assistant Vice Chancellor
Advancement Services

Summary

This item presents information on philanthropic support received by the 23-campus California State University system from July 1, 2013 to June 30, 2014. Section 89720 of the Education Code requires that an annual gift report be submitted to the California Joint Legislative Budget Committee and the California Department of Finance.

A full report will be available in meeting handouts and additional campus highlights will be available for viewing at www.calstate.edu/ua/philanthropic.

Overview

Donors committed a record-breaking \$457.3 million in charitable gifts to CSU campuses in 2013-14 – an increase of 35 percent from the previous year. This marks the third consecutive year the university has seen increases in philanthropic support. Gift commitments are comprised of new gifts, pledges and testamentary provisions recorded during the period. Gift receipts – new gifts, pledge payments and realized bequests – reached \$295.7 million, which was a 4.5% increase over the prior year.

Over half of all gifts received serve the immediate needs of today's students. These gifts provide access to a broad and diverse student population, facilitate innovative teaching models and partnerships, and enhance the college experience. The CSU received over \$166.0 million in current support for these efforts:

- \$18.9 million for student scholarships
- \$44.2 million for academic enrichment
- \$9.9 million for research

- \$30.6 million for public service programs
- \$17.7 million for athletics
- \$44.7 million for other designated priorities

Unrestricted support of \$10.1 million represents 3.4% of all gifts received and is available for high priority needs. Additionally, campuses received \$19.7 million in property and capital improvement gifts for facilities and equipment.

Performance Benchmarking

Philanthropic performance is benchmarked within peer groups of similar size and capacity. Group I campuses are making incremental progress toward raising an equivalent of 10% of the state budget allocation. Group II campuses are expected to raise an equivalent of 10-15% of the state budget allocation. Group III campuses are expected to raise more than 15%. This performance indicator is reviewed during the campus president evaluation. Overall, the CSU raised an equivalent of 22% of the state budget allocation.

Charitable Gift Commitments as a Percentage of the State Funded Budget

	2011/2012	2012/2013	2013/2014	
Gift Commitments ¹	\$ 297,010,687	\$ 338,328,036	\$ 457,271,633	
State Budget	\$1,936,822,538	\$1,825,646,737	\$2,075,283,433	
Total Gift Commitments as a Percentage of State Budget	15%	19%	22%	
				Benchmark
Group I Average	7%	8%	8%	<10%
Group II Average	11%	11%	16%	10-15%
Group III Average	31%	41%	45%	>15%

Note 1: Includes Chancellor’s Office.

CSU philanthropic performance also compares favorably to similar universities across the nation. National comparisons are based on gift receipt numbers reported to the Voluntary Support of Education Survey conducted by the Council for Aid to Education. San José State ranked number four out of all public master’s institutions across the nation following the College of Charleston, CUNY Hunter College, and Boise State University. Nine CSU campuses (Fullerton, Northridge, Pomona, Sacramento, San Francisco, Fresno, Long Beach, San José and San Luis Obispo) outperformed SUNY Buffalo, which was the highest ranked SUNY public master’s institution raising \$8.6 million. At \$88.5 million, San Diego State outperformed SUNY Stony Brook reporting \$78.6 million in the public research category. Cal Maritime, bringing in \$2.4 million, outperformed the \$1.7 million raised by the Maine Maritime Academy.

The following resolution is recommended for approval:

RESOLVED, by the Board of Trustees of the California State University, that the Annual Report on Philanthropic Support for 2013-14 be adopted for submission to the California Joint Legislative Budget Committee and the California Department of Finance.

Peer Group	Campus	2011/2012 Total Gift Commitments	2012/2013 Total Gift Commitments	2013/2014 Total Gift Commitments	Three Year Average	2011/2012 Total Gift Receipts	2012/2013 Total Gift Receipts	2013/2014 Total Gift Receipts	Three Year Average
1	Bakersfield	\$2,645,739	\$5,267,573	\$7,336,831	\$5,083,381	\$2,918,869	\$4,901,434	\$5,698,327	\$4,506,210
	Channel Islands	\$2,014,940	\$3,032,596	\$5,816,162	\$3,621,233	\$2,648,451	\$2,423,029	\$1,766,331	\$2,279,270
	Dominguez Hills	\$4,122,003	\$3,889,594	\$1,709,956	\$3,240,518	\$3,274,284	\$3,322,219	\$1,534,793	\$2,710,432
	East Bay	\$5,192,515	\$4,577,250	\$2,541,365	\$4,103,710	\$3,079,080	\$2,954,823	\$3,431,059	\$3,154,987
	Humboldt	\$7,535,171	\$7,095,256	\$8,613,633	\$7,748,020	\$5,709,064	\$5,550,024	\$7,652,638	\$6,303,909
	Los Angeles	\$5,985,996	\$5,306,456	\$5,325,416	\$5,539,289	\$3,141,720	\$4,405,804	\$6,020,531	\$4,522,685
	Maritime Academy	\$1,596,985	\$2,588,723	\$2,755,384	\$2,313,697	\$1,990,331	\$2,582,267	\$2,425,938	\$2,332,845
	Monterey Bay	\$5,768,245	\$4,207,401	\$4,052,582	\$4,676,076	\$6,113,039	\$4,267,270	\$3,494,035	\$4,624,781
	San Bernardino	\$4,031,363	\$4,225,518	\$5,914,228	\$4,723,703	\$3,133,509	\$2,429,411	\$4,265,523	\$3,276,148
	San Marcos	\$4,213,983	\$5,114,764	\$5,679,175	\$5,002,641	\$2,282,904	\$4,660,321	\$3,685,210	\$3,542,812
	Stanislaus	\$2,358,933	\$2,166,357	\$1,010,541	\$1,845,277	\$1,882,501	\$2,695,965	\$1,312,194	\$1,963,553
		\$45,465,873	\$47,471,488	\$50,755,273	\$47,897,545	\$36,173,752	\$40,192,567	\$41,286,579	\$39,217,633
2	Chico	\$7,564,497	\$8,871,183	\$9,548,488	\$8,661,389	\$4,299,497	\$5,615,932	\$7,385,863	\$5,767,097
	Fullerton	\$7,294,986	\$8,576,136	\$16,027,456	\$10,632,859	\$9,930,554	\$12,888,898	\$10,117,018	\$10,978,823
	Northridge	\$11,399,521	\$14,793,755	\$21,511,163	\$15,901,480	\$8,975,525	\$13,327,290	\$13,269,224	\$11,857,346
	Pomona	\$10,744,565	\$10,164,473	\$34,828,837	\$18,579,292	\$16,435,369	\$19,629,243	\$20,095,525	\$18,720,046
	Sacramento	\$11,162,488	\$10,212,592	\$14,236,085	\$11,870,388	\$7,803,312	\$8,195,635	\$9,776,432	\$8,591,793
	San Francisco	\$17,016,911	\$15,378,536	\$14,338,699	\$15,578,049	\$9,755,271	\$10,075,551	\$11,358,876	\$10,396,566
	Sonoma	\$12,384,760	\$5,537,811	\$11,037,607	\$9,653,393	\$14,125,513	\$7,627,102	\$7,454,412	\$9,735,676
		\$77,567,728	\$73,534,486	\$121,528,335	\$90,876,850	\$71,325,041	\$77,359,651	\$79,457,350	\$76,047,347
3	Fresno	\$24,672,230	\$24,969,668	\$66,663,487	\$38,768,462	\$13,222,664	\$19,820,116	\$17,189,360	\$16,744,047
	Long Beach	\$27,736,945	\$27,013,759	\$28,543,157	\$27,764,620	\$18,132,857	\$13,680,347	\$14,633,860	\$15,482,355
	San Diego	\$67,052,356	\$83,909,499	\$96,752,543	\$82,571,466	\$66,823,751	\$77,564,826	\$88,547,598	\$77,645,392
	San Jose	\$24,873,168	\$35,852,274	\$31,373,175	\$30,699,539	\$14,259,028	\$33,362,138	\$30,225,418	\$25,948,861
	San Luis Obispo	\$27,172,680	\$42,553,738	\$49,168,594	\$39,631,671	\$18,471,478	\$17,736,357	\$19,528,931	\$18,578,922
			\$171,507,379	\$214,298,938	\$272,500,956	\$219,435,758	\$130,909,778	\$162,163,784	\$170,125,167
	Chancellor's Office	\$2,469,707	\$3,023,124	\$12,487,069	\$5,993,300	\$1,769,457	\$3,216,499	\$4,808,419	\$3,264,792
Grand Total		\$297,010,687	\$338,328,036	\$457,271,633	\$364,203,452	\$240,178,028	\$282,932,501	\$295,677,515	\$272,929,348

Note 1: Gift Commitments include new gifts, new pledges and testamentary commitments. Gift Receipts reflect assets received by the University in the form of new gifts and pledge payments.

Peer Group	Campus	New Charitable Gifts	New Pledges	Testamentary Commitments	Native American & Government Contributions	Total Gift Commitments
1	Bakersfield	\$5,237,238	\$2,099,593	\$0	\$0	\$7,336,831
	Channel Islands	\$1,349,520	\$453,791	\$3,870,000	\$142,851	\$5,816,162
	Dominguez Hills	\$1,043,524	\$128,910	\$0	\$537,522	\$1,709,956
	East Bay	\$1,412,752	\$1,108,613	\$20,000	\$0	\$2,541,365
	Humboldt	\$5,026,238	\$3,473,670	\$25,000	\$88,725	\$8,613,633
	Los Angeles	\$4,026,773	\$747,643	\$551,000	\$0	\$5,325,416
	Maritime Academy	\$2,372,663	\$7,721	\$375,000	\$0	\$2,755,384
	Monterey Bay	\$3,119,931	\$852,116	\$80,000	\$535	\$4,052,582
	San Bernardino	\$3,830,063	\$786,765	\$932,415	\$364,985	\$5,914,228
	San Marcos	\$2,920,210	\$953,715	\$1,500,000	\$305,250	\$5,679,175
	Stanislaus	\$881,541	\$79,000	\$50,000	\$0	\$1,010,541
		\$31,220,453	\$10,691,537	\$7,403,415	\$1,439,868	\$50,755,273
2	Chico	\$5,002,264	\$183,647	\$4,362,577	\$0	\$9,548,488
	Fullerton	\$9,111,338	\$2,481,118	\$4,435,000	\$0	\$16,027,456
	Northridge	\$9,996,368	\$8,978,001	\$2,536,794	\$0	\$21,511,163
	Pomona	\$7,972,028	\$1,253,509	\$25,603,300	\$0	\$34,828,837
	Sacramento	\$7,705,585	\$1,222,500	\$5,308,000	\$0	\$14,236,085
	San Francisco	\$7,499,219	\$5,819,479	\$1,020,001	\$0	\$14,338,699
	Sonoma	\$6,564,027	\$2,580,000	\$1,887,250	\$6,330	\$11,037,607
		\$53,850,829	\$22,518,254	\$45,152,922	\$6,330	\$121,528,335
3	Fresno	\$11,049,459	\$51,491,600	\$3,539,350	\$583,078	\$66,663,487
	Long Beach	\$10,473,326	\$4,904,901	\$13,164,930	\$0	\$28,543,157
	San Diego	\$80,555,366	\$9,495,641	\$6,686,536	\$15,000	\$96,752,543
	San Jose	\$18,043,843	\$3,464,332	\$9,865,000	\$0	\$31,373,175
	San Luis Obispo	\$16,887,169	\$9,181,425	\$23,100,000	\$0	\$49,168,594
			\$137,009,163	\$78,537,899	\$56,355,816	\$598,078
	Chancellor's Office	\$4,248,419	\$8,238,650	\$0	\$0	\$12,487,069
Grand Total		\$226,328,864	\$119,986,340	\$108,912,153	\$2,044,276	\$457,271,633

Note 1: Group I campuses generally have less than 5,000 individual donors, less than 10 full-time professional fundraisers, and less than \$25 million in endowment market value. Group II campuses generally have between 5,000 and 10,000 individual donors, between 10 and 20 full-time professional fundraisers, and between \$25 million and \$50 million in endowment market value. Group III campuses generally have over 10,000 individual donors, over 20 full-time professional fundraisers, and over \$50 million in endowment market value.

Peer Group	Campus	Individuals			Organizations			Gift Receipts Total	Total Number Individual Donors
		Alumni	Parents	Other Individuals	Foundations	Corporations	Other Organizations		
1	Bakersfield	\$226,707	\$1,215	\$939,259	\$1,037,398	\$3,178,908	\$314,840	\$5,698,327	706
	Channel Islands	\$21,967	\$16,288	\$403,749	\$399,887	\$873,778	\$50,662	\$1,766,331	1,070
	Dominguez Hills	\$100,650	\$2,135	\$170,899	\$497,235	\$650,060	\$113,814	\$1,534,793	1,478
	East Bay	\$365,379	\$9,785	\$604,314	\$673,836	\$1,643,685	\$134,060	\$3,431,059	1,281
	Humboldt	\$1,371,471	\$133,662	\$1,617,707	\$2,026,754	\$1,708,179	\$794,865	\$7,652,638	7,563
	Los Angeles	\$1,625,665	\$5,950	\$2,255,108	\$559,108	\$1,328,453	\$246,247	\$6,020,531	3,072
	Maritime Academy	\$116,819	\$17,437	\$1,835,812	\$40,295	\$205,628	\$209,947	\$2,425,938	314
	Monterey Bay	\$40,416	\$31,956	\$1,524,030	\$848,290	\$387,302	\$662,041	\$3,494,035	6,257
	San Bernardino	\$232,702	\$32,334	\$1,115,143	\$1,182,373	\$1,478,078	\$224,893	\$4,265,523	2,801
	San Marcos	\$64,361	\$33,951	\$696,561	\$1,780,464	\$750,724	\$359,148	\$3,685,210	1,308
Stanislaus	\$105,155	\$1,725	\$377,766	\$24,597	\$726,967	\$75,984	\$1,312,194	751	
		\$4,271,292	\$286,438	\$11,540,348	\$9,070,237	\$12,931,762	\$3,186,501	\$41,286,579	26,601
2	Chico	\$1,739,411	\$382,840	\$1,003,481	\$437,373	\$3,625,717	\$197,041	\$7,385,863	11,500
	Fullerton	\$1,426,854	\$269,522	\$1,088,586	\$3,896,912	\$3,001,852	\$433,292	\$10,117,018	7,959
	Northridge	\$2,044,613	\$133,624	\$1,490,489	\$5,802,252	\$2,572,753	\$1,225,493	\$13,269,224	8,375
	Pomona	\$2,095,579	\$70,690	\$3,667,493	\$10,195,226	\$1,766,057	\$2,300,480	\$20,095,525	5,091
	Sacramento	\$1,228,669	\$11,134	\$6,373,524	\$880,480	\$1,025,672	\$256,953	\$9,776,432	36,661
	San Francisco	\$2,498,308	\$82,229	\$2,094,699	\$2,886,747	\$2,841,954	\$954,939	\$11,358,876	6,936
	Sonoma	\$261,024	\$27,647	\$3,981,119	\$1,198,365	\$1,691,122	\$295,135	\$7,454,412	1,686
		\$11,294,458	\$977,686	\$19,699,391	\$25,297,355	\$16,525,127	\$5,663,333	\$79,457,350	78,208
3	Fresno	\$6,264,199	\$62,596	\$3,154,869	\$3,292,264	\$4,341,660	\$73,772	\$17,189,360	9,347
	Long Beach	\$3,210,192	\$464,448	\$4,307,218	\$2,429,149	\$3,377,239	\$845,614	\$14,633,860	21,900
	San Diego	\$14,167,107	\$591,801	\$43,175,456	\$20,532,987	\$5,804,417	\$4,275,830	\$88,547,598	64,393
	San Jose	\$17,542,860	\$58,611	\$4,421,270	\$4,709,097	\$3,401,350	\$92,230	\$30,225,418	8,702
	San Luis Obispo	\$4,861,023	\$1,305,638	\$2,810,065	\$1,661,229	\$6,416,289	\$2,474,687	\$19,528,931	12,091
			\$46,045,381	\$2,483,094	\$57,868,878	\$32,624,726	\$23,340,955	\$7,762,133	\$170,125,167
	Chancellor's Office	\$0	\$0	\$220,273	\$4,124,166	\$435,898	\$28,082	\$4,808,419	114
Grand Total		\$61,611,131	\$3,747,218	\$89,328,890	\$71,116,484	\$53,233,742	\$16,640,049	\$295,677,515	221,356

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

Peer Group	Campus	Current Programs		Capital Purposes			Deferred Gifts	Gift Receipts Total	
		Unrestricted	Restricted	Campus Improvements	Endowment				Loan Funds
				Property, Buildings and Equipment	Unrestricted	Restricted			
1	Bakersfield	\$71,019	\$3,964,568	\$1,125,109	\$0	\$537,631	\$0	\$0	\$5,698,327
	Channel Islands	\$444,583	\$1,237,148	\$4,500	\$0	\$80,600	\$0	\$0	\$1,766,331
	Dominguez Hills	\$100,612	\$1,071,491	\$0	\$0	\$362,690	\$0	\$0	\$1,534,793
	East Bay	\$54,752	\$2,803,408	\$0	\$0	\$572,899	\$0	\$0	\$3,431,059
	Humboldt	\$354,263	\$6,084,689	\$8,887	\$0	\$686,107	\$0	\$518,692	\$7,652,638
	Los Angeles	\$354,692	\$2,016,918	\$202,182	\$0	\$3,446,739	\$0	\$0	\$6,020,531
	Maritime Academy	\$1,349,675	\$453,986	\$0	\$0	\$622,277	\$0	\$0	\$2,425,938
	Monterey Bay	\$66,038	\$2,925,205	\$3,657	\$0	\$188,711	\$0	\$310,424	\$3,494,035
	San Bernardino	\$25,716	\$2,842,288	\$821,991	\$0	\$575,528	\$0	\$0	\$4,265,523
	San Marcos	\$117,802	\$2,947,798	\$434,414	\$0	\$185,196	\$0	\$0	\$3,685,210
Stanislaus	\$2,860	\$1,263,215	\$0	\$0	\$46,119	\$0	\$0	\$1,312,194	
		\$2,942,012	\$27,610,714	\$2,600,740	\$0	\$7,304,497	\$0	\$829,116	\$41,286,579
2	Chico	\$280,745	\$3,862,006	\$50,000	\$5,095	\$2,938,017	\$0	\$250,000	\$7,385,863
	Fullerton	\$136,711	\$6,250,904	\$176,980	\$0	\$3,476,358	\$0	\$76,065	\$10,117,018
	Northridge	\$127,459	\$7,837,174	\$484,518	\$0	\$4,820,073	\$0	\$0	\$13,269,224
	Pomona	\$3,954,350	\$4,241,793	\$3,329,883	\$0	\$8,569,499	\$0	\$0	\$20,095,525
	Sacramento	\$146,511	\$7,009,876	\$560,680	\$0	\$2,059,365	\$0	\$0	\$9,776,432
	San Francisco	\$383,116	\$5,907,092	\$941,430	\$1,216,991	\$2,885,247	\$0	\$25,000	\$11,358,876
	Sonoma	\$216,386	\$4,264,900	\$2,363,502	\$0	\$509,624	\$0	\$100,000	\$7,454,412
		\$5,245,278	\$39,373,745	\$7,906,993	\$1,222,086	\$25,258,183	\$0	\$451,065	\$79,457,350
3	Fresno	\$75,625	\$10,558,259	\$1,054,656	\$65,000	\$5,435,820	\$0	\$0	\$17,189,360
	Long Beach	\$763,785	\$10,297,100	\$1,095,142	\$0	\$1,627,833	\$0	\$850,000	\$14,633,860
	San Diego	\$39,860	\$44,574,933	\$4,959,529	\$0	\$7,140,506	\$0	\$31,832,770	\$88,547,598
	San Jose	\$432,057	\$17,368,706	\$23,665	\$0	\$3,146,855	\$0	\$9,254,135	\$30,225,418
	San Luis Obispo	\$485,826	\$11,762,733	\$2,103,708	\$0	\$4,675,648	\$0	\$501,016	\$19,528,931
			\$1,797,153	\$94,561,731	\$9,236,700	\$65,000	\$22,026,662	\$0	\$42,437,921
	Chancellor's Office	\$130,282	\$4,520,122	\$0	\$0	\$158,015	\$0	\$0	\$4,808,419
Grand Total		\$10,114,725	\$166,066,312	\$19,744,433	\$1,287,086	\$54,747,357	\$0	\$43,718,102	\$295,677,515

2013-14 Philanthropic Report Appendix

Charitable Gift Comparisons

Chart V

Category		2011/2012	2012/2013	2013/2014
Source of Support				
Individuals	Alumni	\$40,186,263	\$56,541,930	\$61,611,131
	Parents	\$3,875,175	\$3,672,280	\$3,747,218
	Other Individuals	\$63,127,699	\$75,576,642	\$89,328,890
	Individuals Total	\$107,189,137	\$135,790,852	\$154,687,240
Organizations	Foundations	\$69,740,116	\$79,694,411	\$71,116,484
	Corporations	\$51,687,437	\$51,313,933	\$53,233,742
	Other Organizations	\$11,561,338	\$16,133,305	\$16,640,049
	Organizations Total	\$132,988,891	\$147,141,649	\$140,990,275
Source of Support Total		\$240,178,028	\$282,932,501	\$295,677,515
Gift Purposes				
Current Operations	Unrestricted	\$7,691,216	\$11,411,369	\$10,114,725
	Restricted	\$143,697,732	\$173,783,848	\$166,066,312
	Current Operations Total	\$151,388,947	\$185,195,218	\$176,181,037
Capital Purposes	Property, Buildings and Equipment	\$20,833,405	\$12,927,247	\$19,744,433
	Endowment: Unrestricted	\$111,580	\$157,284	\$1,287,086
	Endowment: Restricted	\$45,469,518	\$61,988,676	\$54,747,357
	Loan Funds	\$100	\$11,080	\$0
	Capital Purposes Total	\$66,414,603	\$75,084,287	\$75,778,876
	Deferred Gifts	\$22,374,477	\$22,652,997	\$43,718,102
Gift Purposes Total		\$240,178,028	\$282,932,501	\$295,677,515

Peer Group	Campus	2011/2012 Market Value	2012/2013 Market Value	2013/2014 Market Value	2012/2013 to 2013/2014 Comparison		2011/2012 Investment Return Rate	2012/2013 Investment Return Rate	2013/2014 Investment Return Rate	Three Year Average	2013/2014 Gifts to Endowment	2013/2014 Endowment Distribution
					Amount	Percentage						
1	Bakersfield	\$17,961,094	\$20,178,522	\$23,498,108	\$3,319,586	16.45%	0.00%	13.43%	15.44%	9.62%	\$537,631	\$872,025
	Channel Islands	\$9,226,137	\$11,972,377	\$13,341,289	\$1,368,912	11.43%	-3.90%	12.30%	17.20%	8.53%	\$80,600	\$211,786
	Dominguez Hills	\$9,633,555	\$11,159,758	\$11,843,647	\$683,889	6.13%	2.58%	14.00%	13.93%	10.17%	\$362,690	\$594,083
	East Bay	\$10,368,835	\$13,448,690	\$15,800,824	\$2,352,134	17.49%	-1.94%	10.50%	17.21%	8.59%	\$442,763	\$442,763
	Humboldt	\$22,269,786	\$24,426,936	\$26,166,024	\$1,739,088	7.12%	0.10%	10.41%	15.52%	8.68%	\$686,107	\$830,898
	Los Angeles	\$18,559,176	\$21,148,375	\$25,863,588	\$4,715,213	22.30%	-3.60%	9.60%	15.10%	7.03%	\$3,446,739	\$769,701
	Maritime Academy	\$3,720,281	\$5,408,542	\$6,729,859	\$1,321,317	24.43%	-2.90%	6.24%	15.34%	6.23%	\$622,277	\$149,292
	Monterey Bay	\$14,019,682	\$15,954,357	\$18,325,078	\$2,370,721	14.86%	-1.30%	11.70%	17.70%	9.37%	\$188,711	\$650,150
	San Bernardino	\$19,170,823	\$21,312,720	\$24,457,752	\$3,145,032	14.76%	-3.40%	11.40%	15.80%	7.93%	\$575,528	\$707,179
	San Marcos	\$17,262,634	\$20,527,619	\$23,296,164	\$2,768,545	13.49%	-3.00%	12.90%	18.60%	9.50%	\$185,196	\$639,874
	Stanislaus	\$9,232,436	\$10,731,223	\$11,953,585	\$1,222,362	11.39%	-1.92%	8.06%	12.48%	6.21%	\$46,119	\$294,380
		\$151,424,439	\$176,269,119	\$201,275,918	\$25,006,799	14.19%	-1.75%	10.96%	15.85%	8.35%	\$7,304,497	\$6,162,131
2	Chico	\$42,174,342	\$48,498,024	\$52,562,821	\$4,064,797	8.38%	-0.80%	11.50%	14.00%	8.23%	\$2,943,112	\$1,531,275
	Fullerton	\$34,276,674	\$42,547,517	\$50,112,038	\$7,564,521	17.78%	-2.46%	8.95%	12.13%	6.21%	\$3,476,358	\$1,167,884
	Northridge	\$63,639,683	\$72,448,632	\$77,506,181	\$5,057,549	6.98%	-2.78%	11.40%	15.50%	8.04%	\$4,820,073	\$2,787,253
	Pomona	\$55,579,506	\$69,290,107	\$86,650,443	\$17,360,336	25.05%	-1.38%	10.95%	15.80%	8.46%	\$8,569,499	\$3,387,912
	Sacramento	\$28,316,872	\$29,317,581	\$33,655,214	\$4,337,633	14.80%	-1.00%	11.10%	8.98%	6.36%	\$2,059,365	\$923,995
	San Francisco	\$51,203,719	\$55,209,507	\$65,384,812	\$10,175,305	18.43%	2.17%	10.86%	13.34%	8.79%	\$4,102,238	\$1,689,353
	Sonoma	\$35,018,336	\$37,069,743	\$43,092,301	\$6,022,558	16.25%	-4.00%	9.00%	12.70%	5.90%	\$509,624	\$1,028,224
			\$310,209,132	\$354,381,111	\$408,963,810	\$54,582,699	15.40%	-1.46%	10.54%	13.21%	7.43%	\$26,480,269
3	Fresno	\$129,447,827	\$142,839,125	\$162,100,727	\$19,261,602	13.48%	-0.63%	9.90%	13.06%	7.44%	\$5,500,820	\$6,721,682
	Long Beach	\$44,084,299	\$50,528,887	\$57,000,071	\$6,471,184	12.81%	-2.40%	11.90%	14.10%	7.87%	\$1,627,833	\$2,032,185
	San Diego	\$136,408,000	\$158,406,000	\$190,608,000	\$32,202,000	20.33%	-1.20%	11.92%	17.35%	9.36%	\$7,140,506	\$5,071,848
	San Jose	\$74,813,247	\$99,869,022	\$119,265,488	\$19,396,466	19.42%	-1.23%	11.46%	15.80%	8.68%	\$3,146,855	\$3,671,822
	San Luis Obispo	\$168,371,557	\$184,048,075	\$207,779,403	\$23,731,328	12.89%	-0.20%	10.90%	15.50%	8.73%	\$4,675,648	\$7,279,645
			\$553,124,930	\$635,691,109	\$736,753,689	\$101,062,580	15.90%	-1.13%	11.22%	15.16%	8.42%	\$22,091,662
	Chancellor's Office	\$10,933,190	\$14,361,030	\$19,539,352	\$5,178,322	36.06%	-0.95%	10.55%	14.62%	8.07%	\$158,015	\$361,853
Grand Total		\$1,025,691,691	\$1,180,702,369	\$1,366,532,769	\$185,830,400	15.74%	-1.51%	10.87%	14.88%	8.08%	\$56,034,443	\$43,817,062

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

Note 2: Fullerton revised their 2011-2012 investment return rate in 2012-2013.

Note 3: Dominguez Hills revised their 2011-2012 and 2012-2013 endowment data in 2013-2014.

2013-14 Philanthropic Report Appendix

Alumni
Chart VII

Peer Group	Campus	Number of Addressable Alumni	Alumni Solicited	Alumni Donors	Total Alumni Contributions	Alumni Participation Rate
1	Bakersfield	43,021	685	153	\$226,707	0.36%
	Channel Islands	9,020	8,977	443	\$21,967	4.91%
	Dominguez Hills	86,749	36,875	1,142	\$100,650	1.32%
	East Bay	115,290	91,062	777	\$365,379	0.67%
	Humboldt	50,526	31,096	3,585	\$1,371,471	7.10%
	Los Angeles	145,087	58,716	2,440	\$1,625,665	1.68%
	Maritime Academy	4,168	3,110	166	\$116,819	3.98%
	Monterey Bay	9,851	9,364	241	\$40,416	2.45%
	San Bernardino	63,968	33,045	1,255	\$232,702	1.96%
	San Marcos	33,258	17,790	394	\$64,361	1.18%
	Stanislaus	53,203	240	176	\$105,155	0.33%
		614,141	290,960	10,772	\$4,271,292	1.75%
2	Chico	143,549	36,562	6,470	\$1,739,411	4.51%
	Fullerton	216,246	190,112	4,450	\$1,426,854	2.06%
	Northridge	296,315	238,541	4,809	\$2,044,613	1.62%
	Pomona	120,954	50,410	3,495	\$2,095,579	2.89%
	Sacramento	210,048	140,332	3,176	\$1,228,669	1.51%
	San Francisco	279,575	31,559	4,207	\$2,498,308	1.50%
	Sonoma	59,546	59,500	340	\$261,024	0.57%
		1,326,233	747,016	26,947	\$11,294,458	2.03%
3	Fresno	188,685	156,557	4,964	\$6,264,199	2.63%
	Long Beach	271,164	145,226	8,201	\$3,210,192	3.02%
	San Diego	292,458	142,249	11,270	\$14,167,107	3.85%
	San Jose	212,968	180,062	4,812	\$17,542,860	2.26%
	San Luis Obispo	161,835	70,942	6,525	\$4,861,023	4.03%
		1,127,110	695,036	35,772	\$46,045,381	3.17%
Grand Total		3,067,484	1,733,012	73,491	\$61,611,131	2.40%

Note 1: Alumni Participation Rate equals Alumni Donors divided by Number of Addressable Alumni.

COMMITTEE ON INSTITUTIONAL ADVANCEMENT

Naming of a Facility—San Francisco State University

Presentation by:

Garrett P. Ashley
Vice Chancellor
University Relations and Advancement

Summary

This item will consider naming the Student Wellness Center in honor of distinguished alumnus Manny Mashouf.

This proposal, submitted by San Francisco 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 request substitutes recognition previously approved by the CSU Board of Trustees in 2008 naming the Mashouf Creative Arts Center (RIA 07-08-11). In 2005, Mr. Mashouf and his family contributed \$10 million for a proposed performing arts center. The center was to be funded by a combination of General Obligation bonds to be issued by the State of California coupled with the Mashouf family's leadership gift. The vision for that project included replacement facilities for Creative Arts, Broadcast and Electronic Communication Arts (BECA) and a new performing arts theater. However, as a result of the Great Recession, the state postponed authorizing any additional bonds, and the capital support that was anticipated was deferred.

In 2012, President Wong informed Mr. Mashouf that the initial plans for a performing arts facility had been deferred, and Mr. Mashouf expressed that he would be open to redirecting his gift to support another capital project on campus. The Associated Students Inc. endorsed naming the new, \$86 million recreation and wellness center as the Mashouf Wellness Center.

Manny Mashouf graduated from San Francisco State with a degree in political science in 1966. He went from a small clothing store owner on Polk Street in San Francisco to becoming founder and chairman of bebe stores inc., one of the largest and most recognizable brands in fashion with hundreds of stores in the United States, Canada and Puerto Rico. He received an honorary doctorate degree in humane letters from San Francisco State in 2008.

Inst. Adv.
Agenda Item 2
January 27-28, 2015
Page 2 of 2

Recommended Action

The following resolution is recommended for approval:

RESOLVED, by the Board of Trustees of the California State University, that RIA 07-08-11 be rescinded, and that the recreation and wellness center at San Francisco State University be named the Mashouf Wellness Center.