University Advancement

• Development

• Communication & Marketing

• Conferences & Events

• Career Development & Alumni Engagement
University Advancement

CSUCI Foundation (501 C 3)
- Supporting / Staffing the CSUCI Foundation Board
- Fund Development
- Budget and Use of Funds

Commencement
- Planning and Logistics
- Supporting the Commencement Committee
- Budget Oversight
University Advancement Mission Statement
To engage and serve students, alumni, community stakeholders and University constituents through innovative and collaborative programs which will support, generate revenue, and increase philanthropic investment for CSUCI.

University Advancement Vision Statement
To build an exceptional advancement enterprise that’s committed to student success and that works in support of the University’s strategic initiatives.

University Advancement Values
Stewardship: to build and strengthen relationships among all our constituents
Teamwork: communicate with mutual respect towards a common goal
Responsibility: to be accountable and responsible for our decisions, actions and outcomes
Integrity: to adhere to the ethical standards as articulated by our various professional affiliations
Diversity: to accept and respect individual differences, perspectives and experiences
Excellence: to demonstrate a commitment to quality and approach challenges and opportunities with optimism
University Advancement Strategy Map
Draft as of 11/6/2018

University Advancement Initiatives

- Increase Philanthropy (4.4 / 4.6 / 4.7)*
  1. Build an Institutional Culture of Philanthropy
  2. Implement Strategic Plan for Philanthropy
  3. Create Communication Plan for Philanthropy
  4. Strengthen Divisional Infrastructure for Philanthropy

- Strengthen Conferences & Event's Support to Campus and Increase Revenue (4.10 / 4.11 / 4.13)
  1. Develop an Infrastructure for Effective Event Planning
  2. Create a Comprehensive Plan for Revenue Generating Events

- Improve University Communication and Strengthen our Brand (4.5)
  1. Promote University Initiatives and Strategies
  2. Evaluate our Brand
  3. Strengthen our Integrated Marketing and Communication Plan
  4. Improve Operational Communication Structures

- Strengthen Career Development and Alumni Engagement (2.13 / 4.4)
  1. Establish sustainable partnerships between industry and education to facilitate experiential learning and career opportunities for students.
  2. Strengthen alumni engagement and affinity with the university.

Strengthen Administrative Support and Financial Services for the Division

1. Assess Internal Operations for Efficiencies
2. Improve Policies and Procedures
3. Implement Systems that Result in Proactive Administrative Support

* The numbers listed with each University Advancement initiative indicate a direct tie to the University’s strategic actions. Please reference the University’s Strategic Initiatives 2018-2023 document.
University’s State Allocation

Chart Title

- OOP: 3.6%
- Academic Affairs: 44.7%
- BFA: 25.2%
- Student Affairs: 1.4%
- UA: 1.4%
- Financial Aid: 8.3%
- Utilities: 2.8%
- Risk Pool: 7.7%
- Other: 4.8%
University Advancement
State-Side Allocation
Breakdown

University Advancement by Category

- Salary: 1,377,622
- Benefits: 512,588
- Operating Expenses: 2,636,639

Legend:
- Salary
- Benefits
- Operating Expenses
CSUCI Foundation Budget

Endowment Numbers

<table>
<thead>
<tr>
<th>Date</th>
<th>Amount</th>
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<tbody>
<tr>
<td>6/30/18</td>
<td>$15,718.002</td>
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<td>6/30/17</td>
<td>$15,136,855</td>
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<tr>
<td>6/30/16</td>
<td>$12,831,165</td>
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CSUCI Foundation Net Assets by Year
## Conferences & Events Trust

<table>
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<tr>
<th></th>
<th>6/30/2017</th>
<th>6/30/2018</th>
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</thead>
<tbody>
<tr>
<td><strong>Revenue:</strong></td>
<td></td>
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</tr>
<tr>
<td>Total Revenue</td>
<td>708,322</td>
<td>974,383</td>
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<tr>
<td><strong>Expenses:</strong></td>
<td></td>
<td></td>
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<tr>
<td>Salary and Benefits</td>
<td>420,397</td>
<td>401,422</td>
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<tr>
<td>Operating Expenses</td>
<td>408,229</td>
<td>647,334</td>
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<tr>
<td><strong>Net Income (Loss)</strong></td>
<td>(120,305)</td>
<td>(74,373)</td>
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Reallocating to Support Strategic Initiatives

Capacity and Sustainability
Action Items 4.10 / 4.11 / 4.13

- Creation of package pricing for external events
- Walk-in hours for event Planning
- 25 Live Trainings
Reallocating to Support Strategic Initiatives

Developing Innovative Partnerships Between Academic & Student Affairs
Action Item 2.13

Expand partnerships between career services, internships and alumni engagement to enhance postgraduate success.

• Merged Career Development with Alumni Programs
Reallocating to Support Strategic Initiatives

Capacity and Sustainability
Action Items 4.4 /4.5/ 4.6 / 4.7

• Consultant for feasibility study
• Part time consultant work in Santa Barbara
• Expansion plans for marketing and advertising outreach
• Reorganization of work flow to strengthen fundraising.
• Brand Evaluation Survey
Challenges Ahead

Career Development & Alumni Programs
- Growing enrollment and number of alumni

Commencement
- Mitigating costs associated with an increasing number of graduates
Thank you!