

University Advancement Budget Presentation

November 20, 2015



Channel Islands
CALIFORNIA STATE UNIVERSITY

Legend:
Blue dotted box:
VACANT position

Richard R. Rush
President

Cathy Sanchez
Development
Administrative Assistant

Nichole Ipach
VP for University
Advancement

Carrick DeHart
Director for
Major Gifts

Elizabeth Rubalcava
Director of
Advancement Special
Projects

Eva Gomez
Director of Annual
Giving & Special
Gifts

Tania Garcia
Director of
Development,
Alumni Relations

Grace Robinson
Director of
Planned & Major
Gifts

Stephanie
Bracamontes
Director of
Advancement
Financial Services

Christop
Direct
Advanc
Opera

Danielle Quillan
Development & Special
Projects Administrative
Assistant

Steven Guetzoian
Specialist, Alumni
Engagement & Annual
Fund

Alissa Blough
Assistant Director of
Advancement Events

Mackenzie Tolson
Advancement Events
Specialist

Alysha Cordero
Alumni Programs &
Development
Administrative Assistant

Anna Tovar
Gift Processing
Administrative Assistant

Julia Levi
Donor Relations &
Stewardship Assistant

Diana
Assoc
Prosp
Grant

Tia C
Advan
& Res

Tom
Advan
Speci

Student Assistant
Oversight

Advancement
Events &
Operations

Alumni Programs
& Development

Business &
Technology
Partnership

Development &
Special Projects

Research &
Grants

Staffing Breakdown...

- **19 STAFF**
 - 1 VICE PRESIDENT
 - 5 FUNDRAISERS
 - 5 ADVANCEMENT SERVICES PROFESSIONALS
 - 1 BUDGET SUPPORT STAFF
 - 4 ADMINISTRATIVE ASSISTANTS
 - 1 EVENT ASSISTANT
 - 1 ALUMNI ENGAGEMENT STAFF
- **5 STUDENT ASSISTANTS**

UA Strategic Plan

MISSION STATEMENT

University Advancement secures philanthropic support, engages alumni, and fosters public/private partnerships to serve students, advance the University's mission and encourage its strategic priorities.

UA Strategic Plan

VISION

We are a champion for the University's Vision as a source for achieving student success and educational excellence through innovative practices, being a trusted steward of resources, inspiring philanthropy, and building strong community relationships.

UA Strategic Plan

GOALS

1. Develop a culture of philanthropy to increase overall giving annually.
2. Foster engagement with a diverse cross section of stakeholders.
3. Create and steward strong partnerships.
4. Create a sustainable infrastructure that supports the Division's needs, leverages opportunities, ensures excellent stewardship and maximizes efficiencies.

UA Budget 15/16

Permanent State Side Funding

New Funds 15/16 - UA was awarded \$63,000 in permanent funding to support an existing position.

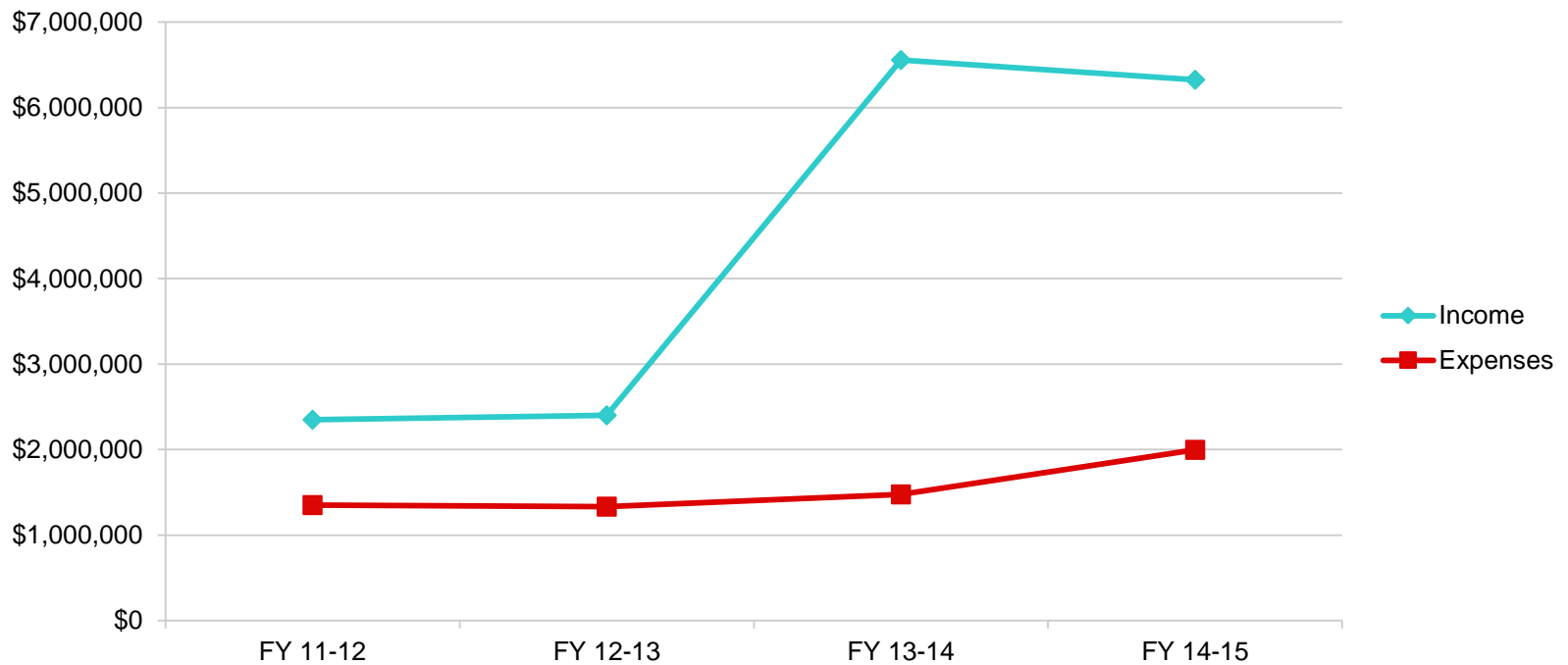
Staffing - \$1,620,457 (salaries & benefits)

Supplies / Operations - \$153,632

Total Permanent Stateside Allocation - \$1,774,089

Revenue Compared to State Side Allocation

Advancement Fundraising Trends



Revenue Compared to State Side Allocation

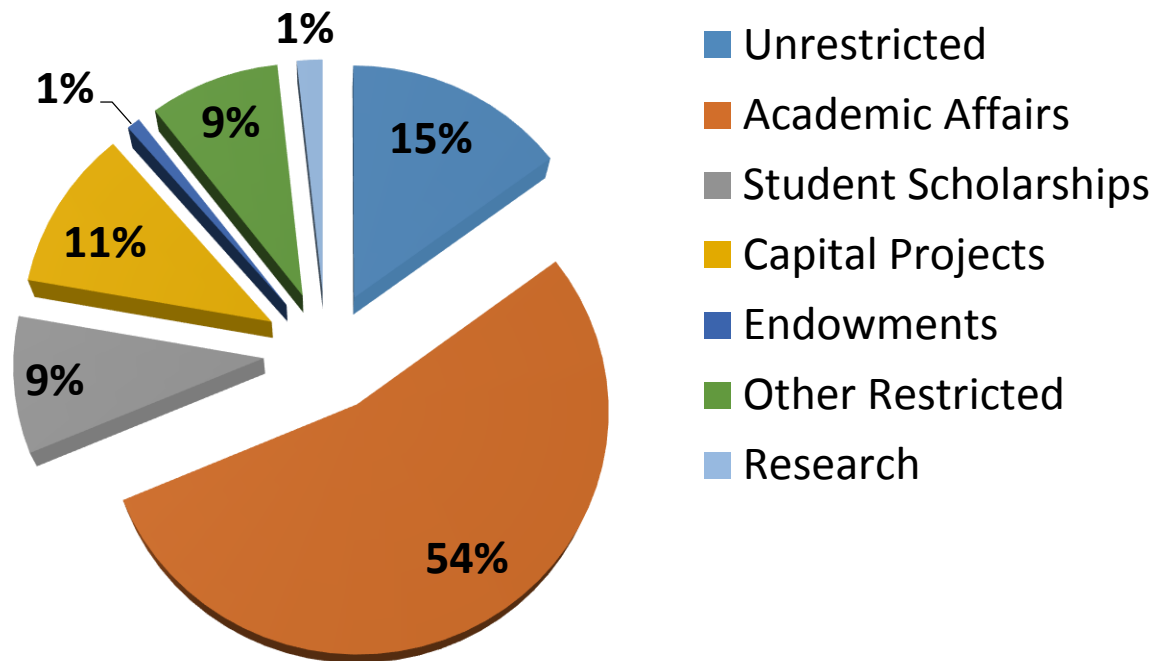
| | 11-12 | 12-13 | 13-14 | 14-15 |
|-------------------------------------|------------------|------------------|------------------|------------------|
| Unrestricted | 349,448 | 707,415 | 1,413,846 | 1,460,170 |
| Unrestricted Planned Giving | | | 3,650,000 | 874,000 |
| Academic Affairs | 1,262,910 | 390,504 | 606,638 | 948,535 |
| Academic Affairs Planned Giving | | | 220,000 | 150,000 |
| Student Scholarships | 214,634 | 35,252 | 156,746 | 202,377 |
| Student Scholarships Planned Giving | | | | 2,285,000 |
| Capital Projects | 255,000 | (18,246) | 4,999 | 20,500 |
| Endowments | 21,317 | 811,957 | 1,565 | (30,625) |
| Other Restricted | 204,700 | 451,938 | 502,916 | 296,934 |
| Research | 40,240 | 22,520 | 100 | 116,840 |
| Total Revenue | 2,348,249 | 2,401,340 | 6,556,810 | 6,323,731 |
| Expenses | | | | |
| Salaries | 1,204,151 | 1,180,095.00 | 1,271,782.00 | 1,863,316.00 |
| Supplies | 146,580 | 151,534.00 | 204,696.00 | 134,115.00 |
| Total Expenses | 1,350,731 | 1,331,629 | 1,476,478 | 1,997,431 |

Revenue Compared to Stateside Investment Highlights

- In 13/14 Advancement's Budget Increased 11% (we hired more support staff) and revenue grew by \$173%!
- That is a \$28.68 return for every dollar invested!

Revenue Allocations FY 11/12 through FY 13/14

Support Trends for Selected Programs



Questions?

**Happiness... consists in giving,
and in serving others.**

Henry Drummond

