### ADVANCEMENT

<table>
<thead>
<tr>
<th>GENERAL OPERATING</th>
<th>Temporary</th>
<th>Permanent</th>
<th>Total</th>
<th>FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vice President</td>
<td>75,000</td>
<td>232,066</td>
<td>307,066</td>
<td>2.0</td>
</tr>
<tr>
<td>TOTAL GENERAL OPERATING REQUEST</td>
<td>75,000</td>
<td>232,066</td>
<td>307,066</td>
<td>2.0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>AUXILIARY ORGANIZATION</th>
<th>Temporary</th>
<th>Permanent</th>
<th>Total</th>
<th>FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundation</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>TOTAL AUXILIARY ORGANIZATION REQUEST</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>
University Advancement Strategic Plan General Overview
Revised January 2014

Mission Statement
The Division of University Advancement generates support for university priority projects, and strategic initiatives, promotes partnerships, strengthens relationships, and enhances the University's image through awareness of programs, achievements, and goals.

Vision Statement
CI strives to be a premier Advancement Office characterized by innovation, collaboration and engagement with diverse communities in support of student success and university wide priorities.

Values
Creativity
Enjoyment
Flexibility
Integrity
Kindness
Optimistic
Passion
Professional
Teamwork

Strategic Initiatives

Resources. Develop strategic relationships with and solicit support from key constituents in key programs.

- Increase the dollar amount and number of major gift prospects ($25K and up).
  * Raise the contribution level of the Foundation Board.
  * Improve moves management process and formalize the donor engagement process
  * Increase and customize donor stewardship activities

- Corporations and Sponsorships
  * Increase engagement and support of events through increased sponsor visibility

- Give to CI
  * Launch Annual Giving Program (4 solicitations per year)

- President's Circle
  * Increase giving levels of President’s Circle Members
  * Increase the number of President’s Circle Members

- Business and Technology Partnership
  * Increase membership in the Business and Technology Partnership
  * Increase sponsor support of Business and Technology Partnership Events

- Alumni
  * Increase the number of alumni donors
  * Increase alumni engagement through events, career mentorship, and the establishment of alumni networks
  * Take a leadership role in creating the visions, traditions, and theme of commencement
• Donor Stewardship
  * Create an annual report for the CI Foundation
  * Customize donor the donor acknowledgement process
  * Create a system to ensure timely and accurate reports on grant awards to funders
  * Identify donor naming opportunities on campus

• Planned Giving
  * Build awareness of and officially launch the CI Legacy Society
  * Increase the number of Planned Giving Advisory Council Members
  * Increase the identification and solicitation of prospective planned giving donors

• Events
  * Increase sponsorship, ticket sales, and maximize fundraising activities

• Leave Your Mark Campaign
  * Increase number of donors and funds raised

• CI Campaign
  * Begin planning for a comprehensive, multi-million dollar fundraising campaign in support of the University’s top priorities

Image and Identity. Promote a positive image of the university’s unique and innovative accomplishments, reflecting a regional, national and international presence.

• Develop stronger boards and stronger University advocates.
  * Foundation Board
  * President's Circle
  * B&TP
  * Alumni & Friends
  * Planned Giving

• Promote and increase public awareness about CI students, faculty work, achievements, and unique innovations:
  * Alumni (Website)
  * Faculty (International accomplishments)
  * Campus Achievements
  * Students

Partnerships. Actively seek opportunities to connect the University with business and industry for the mutual benefit of each.

• Enhance alumni professional mentorship opportunities
• Identify and establish regional partnerships that advance the University.
• Improve internal campus partnerships.
  o Clarify RSP/UA roles/responsibilities with regards to:
    1. Foundations
    2. Grantors
    3. Partnerships
Funds requested for new growth in Advancement reflect the critical needs of the division with regard to its strategic plan. More specifically, funds requested will allow for more efficient and streamlined fundraising activities, additional fundraising activities, and the tools needed for newly hired and existing staff to accomplish their goals successfully.

**Priority One - $160,250**

$50,000 to cover one-time costs associated with a campaign consultant to perform a feasibility study and wealth screening of prospective and existing donor constituents. As noted within the strategic plan overview, Advancement is moving forward to plan for a multi-million dollar campaign in support of the University’s highest priorities as determined by the University President. Creating a plan that includes a realistic campaign goal as well as a specific pathway for success for a project of this anticipated size will require outside consulting services. If unable to secure funds needed to hire a consultant, it is highly unlikely that University Advancement will achieve its goal of launching a campaign within the next two years.

$62,250 has been requested to hire an additional Administrative Assistant for Advancement. In the coming months Advancement will welcome two new director level positions to the team. As a result, we will have a total of four Directors and one Vice President in need of administrative support. Currently, Advancement only has one Administrative Assistant to serve all five of these positions. If unable to hire an additional Administrative Assistant, advancement operations and, in particular, its fundraising goals will suffer significantly. The $1,500 and $8,500 requested are specific to accommodating the search as well as computer and potential furniture needs of this position.

$35,000 in permanent printing costs is requested in support of the Annual Fund Program as well as the Planned Giving Program. In FY 13/14 Advancement was awarded $15,000 in temporary printing funding to support Annual Fund Program solicitations. A total of three solicitation pieces are scheduled to drop in 13/14. The first solicitation piece for 13/14 dropped in November of 2013 and produced over $10,000 to date. We anticipate that all three solicitations will generate over $30,000, providing a great start to a program that will build on itself year after year and that is a critical piece of our fundraising programs.

To continue and grow the Annual Fund, Advancement must receive permanent funding ($25,000 of the $35,000) to continue solicitations. Without the requested resources the Annual Fund Program will not be able to continue at its current level and it will diminish significantly. Annual Fund Programs act as an entrance point for many donors who want to support an institution. As a result, many times major gifts come to institutions via the Annual Fund Program. Simply put, Annual Fund Programs are the foundation to all fundraising programs and, as such, play a critical role.
In the coming months, Advancement will hire a Director of Planned and Major Gifts. To date, Advancement has not received funding in support of operating costs such as printing for the Planned Giving Program. The new Director of Planned and Major Gifts will need resources to available to meet the goals and objectives outlined within the Advancement Strategic Plan.

Growing the Planned Giving Program is a top priority as it will significantly support the multi-million dollar campaign as well as overall fundraising. CSU Long Beach, CSU Fresno, CSU San Diego, and CSU Pomona each reported that the largest contributions to their campus campaigns were planned gifts. These gifts ranged in size from $5 million to $30 million. In addition, this year alone $2.4 trillion will transfer from the “baby boomer” population as a result of their passing away according to a report made by Advancement Services. However, only 44% of this amount will transfer to their heirs. This is the largest wealth transfer in the history of our nation and, as such, is a big opportunity for fundraising via planned gifts.

Of the $35,000 requested, $10,000 will be allocated to support the CI Planned Giving Program. More specifically, funding will be used to create brochures, marketing pieces, and invitations related to the CI Legacy Society. Without funding to support printing needs, the Director of Planned and Major Gifts will not have the resources needed to increase awareness of the Planned Giving Program and increase the number of planned giving donors to the University.

**Priority Two- $115,812**

$62,250 is requested to hire a Gift and Event Processing Assistant. The $1,500 and $8,500 requested are specific to accommodating the search as well as computer and potential furniture needs of this position.

Half of this position’s responsibility will be to support the processing of gifts and other budget related responsibilities. The other half of the position will be to support events - not with logistics, but with back end data entry and processing related to information captured within Raiser’s Edge (Advancement’s donor and constituent database).

The number of gifts, contributions, and events has increased steadily over the last two years and is expected to increase significantly as a result of aggressive alumni giving goals and the hiring of a Director of Planned and Major Gifts. It is also expected that the forthcoming comprehensive fundraising campaign will generate additional gifts and financial processing needs.

Advancement is currently depending on a student assistant to aid in processing the increasing number of gifts as well as the increasing number of other transactions such as ticket sales to events. The use of student assistants to complete this work is problematic as student schedules are not conducive to the daily processing required to meet gift acceptance policies. In addition,

---

1 The CI Legacy Society is a donor recognition program- similar to the President’s Circle- specifically for individuals who have made planned gifts in support of CSU Channel Islands.
the use of student assistants introduces liability issues associated with donor confidentiality and the handling of large sums of money.

Advancement events are growing in attendance as well as in number. Alumni Relations is expanding to include additional alumni engagement events such as the Distinguished Alumni Awards and alumni network events. The Alumni and Friends Association’s Dodger Day event has increased in size to over 850 in attendance, the Business and Technology Partnership Leadership Dinner set a record attendance of over 200 in Spring of 2013, and the President’s Dinner has ambitious goals to grow significantly.

If Advancement is unable to hire a Gift Processing and Events Assistant, we will continue to be at risk of violating policy and carry liability issues with regard to donor confidentiality and ensuring the proper handling of large gifts.

$52,106 is requested to reclassify three existing staff positions. The Assistant Director of Development will be reclassified to Director of Development, Annual Giving in recognition of the position’s expanded role to include oversight of all annual giving programs as well as the Leave Your Mark Campaign. The Advancement Events Assistant position will be reclassified to an exempt Advancement Events Specialist position in recognition of the increased volume of events as well as aggressive event related fundraising goals. The Associate Director of Research and Grants position will be reclassified to Senior Associate Director of Research and Grants in recognition of the positions expanded role to accommodate a significant increase in research requests and database analysis that will result from the hiring of additional fundraising staff as well as the forthcoming feasibility study as a part of the planning for a multi-million campaign.

If these positions are unable to be reclassified to accept more responsibility, Advancement will have significant challenges in being able to achieve its fundraising goals. Specifically the division may not have the minimum capacity needed to increase staff workload to absorb a comprehensive multi-million campaign. Expanding the ability of existing staff to take on more responsibility will be critical with regard to executing what will become one of the division’s most critical projects.

Priority Three – $19,460
$5,000 is requested to support travel needs related to the establishment of alumni networks within and outside of the region. As a critical piece of growing the alumni programs and alumni engagement, travel to visit with alumni and encourage alumni networks outside of the immediate local region is necessary. Without funding for travel, the University is at high risk of a significant decrease in alumni engagement as alumni numbers grow. Keeping alumni engaged and in touch with CI as well as University Advancement is critical with regard to the future of general alumni giving and specifically major gifts.

$5,000 in temporary funding is requested to purchase software and equipment for events. More specifically, auction and event check-in software as well as equipment such as convertible sign stands and event displays is needed to reach division goals of enhancing Advancement
events with regard to efficiency and fundraising efforts. If these items are not purchased, it is highly unlikely that Advancement will be able to streamline and improve efficiencies with regard to event check in operations as well as auction fundraising. We will continue to struggle with difficult and time exhausting staff efforts to serve event guests and provide them with a customer friendly way to bid on auction items and take advantage of fundraising activities.

$5,960 is requested to support two additional user licenses for the Raiser’s Edge constituent database. With the hiring of two director positions and additional administrative support positions, additional user licenses are essential. Currently, the Advancement office has a total of seven licenses. Despite coordination efforts, often the maximum number of licenses is occupied causing delays in accessing information needed by staff on a daily basis. The delays are an inefficient use of staff time and this could easily be avoided by the additional user licenses.

$3,500 is requested to cover costs associated with an annual subscription to Crescendo Planned Giving software. In addition to generating specialized planned giving proposals for prospective donors, the subscription will also provide Advancement with content for planned giving marketing brochures, websites, and other communications. In 2008, University Advancement cut this subscription from its budget as a result of system-wide budget cuts. However, with the hiring of the Director of Planned and Major Gifts, this tool will be necessary to support fundraising efforts. Without this software, the Director of Planned and Major Gifts will not have the basic tools readily available to solicit planned gifts from prospective donors. As previously mentioned in priority one, Planned Giving is a critical component of Advancement’s overall fundraising goals as well as creating the infrastructure needed to achieve a successful comprehensive multi-million dollar campaign.
The enclosed request has space implications with regard to the proposed new positions, Advancement Administrative Assistant and Gifts and Events Assistant. Within University Hall, Advancement does have enough existing space to accommodate these new positions. There are two various scenarios that could be undertaken to accommodate the two positions as well as to make room for any additional staff hires in the near future.
<table>
<thead>
<tr>
<th>Amount Requested</th>
<th>Fiscal Year</th>
<th>Permanent or Temporary?</th>
<th>If Temporary, # of Years Needed</th>
<th>FTE</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>$160,250</td>
<td>2013-14</td>
<td>P/T</td>
<td>1</td>
<td>1</td>
<td>$50,000 consultant costs. $65,250 Administrative Assistant position. $8,500 new staff start up costs. $1,500 Position search costs. $35,000 planned and annual giving program printing costs.</td>
</tr>
<tr>
<td>$127,356</td>
<td>2013-14</td>
<td>P/T</td>
<td>1</td>
<td>1</td>
<td>$65,250 Gift and Event Processing Assistant position. $8,500 new staff start up costs. $1,500 position search costs. $52,106 staff reclassifications re: increased workload.</td>
</tr>
<tr>
<td>$19,460</td>
<td>2013-14</td>
<td>PT</td>
<td>1</td>
<td>0</td>
<td>$5,000 funding for travel. $5,000 software and equipment for events. $5,960 Raiser's Edge user licenses. $3,500 Crescendo subscription.</td>
</tr>
</tbody>
</table>

Temporary: 75,000
Permanent: 232,066
Total Request: 307,066