

**Fresno State Commission on the Future of University Advancement
Commission Retreat
June 30, 2011
8 a.m. — 5:30 p.m.
Haak Center Boardroom**

Welcome and review for the day.

Historical Overview (handout)

- Approx. \$7,000/per FTE from the state. FTES (full time equivalent student; 15/semester for undergrad, 12/semester for grad)
- There have been periods of growth and contraction.
- We will be asked to teach more students with less resources.
- There are approximately 600 full-time faculty and approx. 600 part time faculty on campus.
- How dependent are our students on loans? Our international students are not able to receive financial aid. Government subsidies and families support international students.

University Demographics Tina Leimer (handout)

- Fresno State Students Past, Present and Future.
- Discussed remediation and retention
- Minority students have surpassed white students in enrollment. Important to think about the future alumni population.
- Percentage of first generation college students has always been high at our university over the past 20 years.

Lightning Round - What do you know now about the university that you did not know before?

- Student demographics.
- How much we appreciate our volunteers.
- System infrastructure to support growth.
- Fundraising arms (Ag One, Foundation, etc...)
- Learned where everything fits.
- Development office is closer to aspirational.
- Complexity of various operations/units.
- Enthusiasm for the campus.
- Support the president needs to move forward.
- Commitment of diverse perspectives to support the campus.

What were your assumptions or expectations when the Commission's work began, and how have they changed?

- There is a lot of good already in place and implementation may not be so far away.
- There is more opportunity than previously realized.
- Assumed there was a greater degree of development collaboration.
- The connection between fundraising arms is more important than previously realized.
- More focused on what *can* we do that what *can't* we do.

- We don't take time to realize the successes we've had.

Workgroup: Brief History of Fundraising at Fresno State; lessons learned from campaign that inform planning for the future (Vida Samiian, Nat DiBuduo, Ray Steele)

- Met twice.
- Total of 25 people were interviewed.
- Comments reflected in distributed notes.
- Issue of trust, transparency, and collaboration between various boards. There needs to be promoted efforts to improve these relationships.

Question for Vida:

Did anyone provide you with examples of what can be done to strengthen relationships? Yes.

- Lack of trust created distracting environment.

Recommendations from whole committee:

- Monthly, weekly status reports.
- Concern the Campaign Leadership Committee (CLC) did not share information with Foundation Board of Governors (BOG).
- Disconnect creates stress, lack of communication.
- What's missing is a feeling that we are all in it for the same reason; we lack that feeling of connection.
- Get them all together for meetings.
- There needs to be concurrence from the campus entities with what is reported.
- Not always is the Director of Development (DOD) the decision maker, so they are not always able to be forthright.
- It is not uncommon for different entities to be working on their own projects (ex: President may be cultivating someone the VPA does not know about).
- Term limits need to be evaluated.

Workgroup — Case for Fundraising as a University Priority; Ways to Fund Advancement as a Priority (Ray Steele, Debbie Adishian-Astone, Darin Zuber)

- Mission — not to defend advancement but how to plan for the future.
- State Allocation, University Improvement Fund, University Support (allocated to Deans that goes back to Advancement), Gift Assessment Fee (fee on cash gifts), Endowment Management Fee (Foundation charge to manage an endowment).
- Peer institutions are 1% higher in Advancement than Fresno State.
- Average institutional support for Advancement is 51% — ours is 58%
- Minimum of state and foundation funds which are guaranteed each year.
- Suggestion to generate Advancement revenue through students.
 - New student fees are only relevant if they're paying for something they don't already have.
- The way the Annual Fund is being managed needs to be reevaluated (looked at).
 - Review the Annual Fund and call center and implement best practices.
 - The Annual Fund and call center should not be looked at as the same thing.

Workgroup — Best Practices found in development programs and campaigns at peer and aspirational universities; recommendation of a comprehensive university-wide development organizational Model (Steve Spriggs, Nat DiBuduo, Cassandra Joubert)

- Apparent conclusion is Fresno State follows best practices but lacks a "depth of bench" (people and program depth) to tap our potential capacity for Advancement.
- We recognized the disconnect between Development Officers and Advancement with Athletics.
 - Athletics Development Officers should have the same reporting as campus DODs.
- President is an "absentee member" on some of the boards where he should have a more active role (where he is cultivating prospects) A PERCEPTION — NOT REALITY.
- University Communications and Athletics has a disconnect when reporting donations to community.
- There is a great disconnect between the Athletics database and the university's Advance database. Greater coordination is needed.
- The culture of a student giving back to the university is predominantly through Alumni. Other universities have development ambassadors.
- Division professionals are underpaid and understaffed by any model.
- Development Officers nationwide have a short tenure. This is not a money issue — it's the title of the position. They will move to a more prestigious place for a higher title even if they're making the same amount of money.
- No staffing levels have decreased from the conclusion of the Campaign.
- Organizational Chart (Centralized Development vs. Decentralized)
 - We have a good overall model, but the fundraising entities are not within the norm of the successful model
- All Development leadership should meet more regularly.
- The model that Arts and Humanities uses seems to work well.
- Every entity, committee, foundation, is advisory to the president. The president is the ultimate authority.
- Organization cohesiveness is to be clear about the role of the president.
- The Foundation Board is currently reviewing their role with Advancement.

Change becomes agreeable when the goal is clear by all parties. Change is loss unless you know the benefit of the change.

Workgroup — What core Advancement Services are necessary to support appropriately the university's investment in development? (John Gomes, Honora Chapman, Steve Spriggs)

- Systems — Advance Database, Athletics' system (Pacilolan)
- Processes — supposed to be logging all info into Advance.
 - Maybe utilize Save Mart Center concert goers as prospective Arts & Humanities contacts.
 - You need to have an ongoing research process so you can build as you go.
- People — there are not enough resources allocated in the right area to accomplish the goal.
- Inventory — staff needs to confirm/dispel concept of understaffed roles in DODs, development program areas and Advancement Services.
- Performance based accountability. Not every college has a DOD.

- There are areas with the ability to raise funds, but they have no Development capabilities.
- It is not unusual for a portion of the money raised to go back to the college it was given to.

Workgroup — Methods to Welcome, Mentor, Support, and Appreciate Volunteers

(Honora Chapman, Steve Spriggs, Darin Zuber, Vida Samiian)

Fact gathering via survey

- Advisory Board for colleges makes substantial donations
- Formal evaluation process for volunteers
 - Some found it offensive
 - Term limits came up repeatedly
 - Parking passes for donors.
- Demonstrate appreciation towards those who volunteer
 - Training and coaching
 - Evaluating volunteers
 - Develop strategies for refreshing/recruiting volunteers
 - Thanking volunteers appropriately
- Find the volunteers "hot spot."
- Not giving parking passes has broken down relationships.
- What happens to someone who leaves a volunteer board? Does anyone contact them about being a part of something else?
- Volunteers on advisory boards could maybe be solicited for more prestigious boards.
- The Advance database could catalog boards more effectively.

Workgroup — Methods for Evaluating and Measuring Program Effectiveness

(Cassandra Joubert, Steve Spriggs, Debbie Adishian-Astone)

- History of how program effectiveness has evolved.
 - University would achieve private sector donations 10% above what our general fund holds.
 - How many alumni are making contributions?
- Based on our peer institutions, we could afford to follow up program effectiveness with feedback from donors.
- How do we know if our development process will "fit" years from now?
- Feedback loop.

What are some possible stewardship or appreciative ideas that you would share with Dr. Smits?

- 3 examples of 'thank yous' observed this year: Centennial Gala, SimLab for Nursing, Assembly (President's Award of Excellence).
- Ask your customer. What do you think would be some good ideas? People like to be asked for advice.
- Find young alumni who made their first gift to the campus; have them present at Dog Days for entering students, giving their personal story about why private support is so important and why they are giving, even at a modest level.
- Send out annual notifications to everyone about donors.

- Thank you letter (not a bulk/form letter) that lets the donor know what happened with their gift.
- We are missing the idea of how to use the technology to benefit the end result. "Brute force" to acknowledge receipt of a gift is not that same as thanking them.

Themes:

- Role the volunteer plays.
- Resource Allocation.
- Culture of Appreciation.
- Trust, Transparency, Effectiveness, and collaboration.
- Effective Use of Data: Systems and People.

Statements from Overarching Themes as "prologues" to recommendations:

1. The university and its units value the trust that has been bestowed over generations of alumni and the community. It is committed to transparency and accountability in serving the community with quality education. Our highest collective priority is the greater good of the university and the community it serves.
2. The university is best served when it maximizes capabilities within existing databases for capturing, managing and effectively using current and new data. A single university database should reflect and record alumni engagement including interests, giving levels, and campus participation. Users of the system should be trained to effectively use and • understand the system, and policies should be implemented regarding use.
3. In a shared vision of University Advancement, collaborative and cooperative working environments that are mutually rewarding, respectful and affirming are nurtured, encouraged and rewarded at every level.
4. The university demonstrates appreciation for volunteers and donors, and the community by valuing and respecting the time, talent, and treasure of its supporters.