

# California State University, Fresno

## Commission to Plan for the Future of University Development

Updated 2/6/11

Notes from on-campus interviews held on January 12-14. Names of Commissioners interviewed have been removed from their comments. Not everyone interviewed was asked every question. No responses have been substantially edited.

### 1. What is your understanding of the main purpose and deliverable of this Commission?

We need to provide a recommended framework to create a successful development future for the University.

Recommendations for a process and structure to continue or revise our advancement operation.

Determine the advancement function of this University. The future of public higher education depends more and more on private support. The University has to ask how we are going to find the resources for funding in the future.

Purpose: To secure an on-going interpretation of efforts to secure resources for students and faculty; to secure the future of the University in the current economy. The community benefits enormously from the University being here—business is attracted to the region because of the University.

How we should be structured going forward after the campaign.

We need to step up the effort to support students financially. The need is becoming larger and larger. On the coast, people perceive Cal State system as a second rate system. Yet we are competing with Ivy League schools for the best students. We have a brain drain from the central valley. The University does not do an adequate job of providing scholarships despite the Cal Grant program (if family income is \$70,000 or less, Cal Grant will cover tuition). In the Honors College, the number of students in each class has decreased from 75 per class to 50 per class because of availability of scholarship funds. The Alumni Association is the most generous organization in providing scholarship dollars outside of state funds. The Honors College needs a full-time development officer.

To have a direction for fundraising for the future ~ we need to plan.

Helping President Welty determine a more precise role for development, how it can better help the University, and reach more people in the process. There has to be a high priority on fundraising. We need to invest our money so we get the highest and best return so endowment will grow and payouts will yield more cash.

The Commission has the responsibility for recommending the next phase of the University's development efforts. The University should build on a strategic vision, using the resources of the Commission to be forward thinking.

Create a general plan accompanied by a specific plan for how to raise support for the future of the University. Economics are challenging the system through cutbacks -the cutbacks seem to be more operational.

Look at the future of our development effort post June 2012. How will it be structured? What will it look like? How did we do and what did we learn? How do we

improve? There are lots of successes and things to take into consideration as things move forward. We want to make sure it's a helpful process. Folks realize that Dr. Welty did not have to do this. Lots of things changed when the economy changed.

Purpose is to look at reforming the advancement team and the way the department is structured and what its tasks are. (I prepared a report for Dr. Welty that suggested some things are not as they should be.) Athletics is struggling to figure out its role in financing its operation. The relationship between Athletics and Advancement is a big issue and is an elephant in the closet. The Athletic Dept. has to get more bound up and tied to the University. They need to be better connected to the University.

**2. Why do you believe President Welty constituted this Commission?**

The President is looking for a good plan; some muscle in making the decision.

Because I'm in charge of an organization that raises \$2-4 million each year, and I'm out in the public a great deal.

John is very consultative in major decisions. He really does want the opinions of the Commissioners. This reflects his style. This is the time for our work since we have 1.5 years remaining on the campaign. As the Commission's work is disseminated to the boards and campus community, folks will be aware that it has been a thoughtful, deliberative process. Dr. Welty always takes seriously the recommendations of a task force.

**3. Do you trust that the Commission's work does not have a predetermined outcome?**

Yes. The President loves information. This is an honest inquiry.

There is no predetermined outcome - President Welty doesn't work that way.

Yes. We are all partners. The problems are too complex for any one person to figure out.

Yes.

Yes.

Yes.

Yes. Our work is honest and sincere.

Trust is not predetermined; we need a deliverable that the board of the Foundation can buy into.

Yes. Knowing the group, they wouldn't allow anything less.

Yes. This commission's work will be very useful to Dr. Welty and to a new President. Dr. Welty is a great listener.

**4. Why do you believe President Welty invited you to be part of this Commission?**

I work with deans on fundraising; it is a crucial element. The commission should have a comprehensive, well-informed view of academics.

Because of my position as head president of one of the foundations. We are a good group, with much credit to our executive director. How have we done a good job? We are very supportive of alumni across the state; we organize events to tie alumni to the

University; we (staff and volunteers) build relationships; we make people feel good about supporting the University.

I'm seen as a fact gatherer before reaching a decision. Facts can blunt criticism. I have the respect of the Foundation board and campus community to provide valued, reasoned and prudent opinions. Dr. Welty and I have mutual respect for one another.

I have a good understanding of the University, having grown up in it. Result of my long-term involvement with the University. I like to present a counterpoint and help keep thinking fresh. I am an alumnus and dedicated volunteer, and I'm a businessperson who wants to leverage the University to its highest level as an economic engine for the valley.

President Welty knows I'm not intimidated – I engage people for constructive responses. This is an opportunity for me to pay my dues to Dr. Welty... to help him perpetuate the future of the University.

My role as exec. dir. of the Foundation; I am close to some issues that are of concern to some; my tenure at the University; I have been in the community a long time and I hear many perspectives.

I am as connected as anyone with the community at large. I can help control rumors and messages. Dr. Welty knows that if he asks me to do something, I'll do it. I am tactful as well as insightful. The President trusts me.

**5. Do you believe this Commission's work is important? Why (or why not)?**

I am excited to be part of the Commission.

This is the opportunity for courteous but forthright discussion.

The Commission's work is important. It is essential to have planning underway before the end of the campaign.

It's not going to get any better... the gap in dollars from the state is going to widen. We can have expenses decrease (shrink) and we can raise fees. This is a challenging mindset. The culture within the University with respect to fundraising has changed as the donors have embraced it. This must continue.

The report of the Commission must not be allowed to sit on a shelf. And we need to get this work accomplished before President Welty retires.

Very important. Given the investment by the University and the foundation in the Fundraising effort, and the increasing reliance on private fundraising and our need to be conscious of our return on investment, it is fiscally responsible and prudent to look at what we've done and what we've learned. We may need to tell the story of why the investment is important and why it may need to continue looking like it looks now/does not look like it does now to show that we have done our due diligence so we can substantiate the need. Did all the success of the campaign happen because of the campaign? The discussion about this would be welcomed. We should be more proactive about how we can be more efficient and effective rather than reacting to calls for efficiency from the external community.

Very important because we have to make a dramatic break with the past – some structural, some personality. We have to bring out of the closet the ambivalent relationships, like athletics.

**6. Do you already have an opinion or an idea of what the Commission's work might result in?**

There will be more cuts to all divisions. The process will encourage President Welty to reconsider priorities. He "gets" development.

The outcome will be a position on what happens when this capital campaign ends and recommendations about what university fundraising should be.

No. I came to academics from philanthropy. There have to be some changes in the academy. My fear is that there will be some loss caused by a focus on teaching numbers, efficiency, "do more with less," course loads, advising, research – all these things are going to get squeezed. There will be fewer faculty handling more students.

*The success of this Commission is based on one principle: can we look forward to what we want instead of spending our time whining about the past? Our criticism must be laced with opportunities and strength. We have to be innovative in applying what we know of the past to the future.*

**7. Will you share with me your understanding of the term "university development"?**

Deans have a significant role in the campaign.

Development = fundraising. The process of relationship development. A labor-intensive and expensive function that must be done. We need to better tap alumni and foundations.

Development/Advancement – I know it to be both fundraising and friendraising. There is no quota with friendraising; there is a quota with fundraising. The job of development officers is going to get harder and more important.

Development = fundraising to advance the University. I think this way because I do it.

Fundraising, prospect development, relationship building (alumni, corporations, foundations, individuals).

Developing University support in the way that creates a good feeling followed up with private financial support to leverage the diminishing state resources.

Development = fundraising; building relationships and instilling the "buy-in" to prospective donors. Conveying need in such a way that donors enjoy contributing and being part of the University. My dad believed in giving back to the community, and he did some fundraising for the University. I am glad to follow in that tradition.

Development/Advancement = raising money. Over the past 10 years, I see it as fundraising and the program to support it. There may be problems with some others- they may not understand the purpose. Development is a way to engage people, not to make them feel they have some unknown obligation.

Philosophy of fundraising – about relationships, appreciation, understanding that people have multiple interests, being genuine, stewarding funds appropriately and appreciatively, being responsive. We are in the service role.

*Development = fundraising. Advancement should promote the entire University's mission. The environment currently is c.y.a. and justifying job security. How can we operate*

*from vision rather than reacting from fear? We have the chance to determine what comes next, what type of organization is needed to achieve our vision, and how it will be funded.*

**8. How important to the future of the university is private support?**

Development has taken a bigger “hit” than most. Look at the staff size before the campaign and in 2010.

At one time, state support was 95% of our budget; now it’s less than 50%. We have to diversify the revenue stream. We are giving greater visibility to what we do – the community hasn’t always known who we are. Deans and development staff feel good about what’s happening.

Essential in order for us to be top notch.

Essential and critical. The University will not be able to provide the programs it currently does without private support. We need within 5 years to have a \$500 million endowment and to have more unrestricted gifts or more flexibility with donors for the use of their gift funds.

If we want to continue to improve and enhance the educational experience, private support will be increasingly critical to the survival of Fresno State. If the public elects *not* to invest, we will look very different unless private support is robust.

Pretty important. As I get older I understand the importance better. We have to move beyond this being a state supported campus. What is the economic impact of the campus?

Critical. Academic community, deans and faculty are much more aware of the need for private support and what private support can do for Fresno State. There are things we can do now that otherwise would not happen. Many of the great new things happened because of private support. The philanthropic effort began with Dr. Welty.

Its importance is inching up every year. The Advancement effort is going to be critical in the messages of the University and in raising private support. The difference in “great” and “moderate” is the amount of private support we generate.

**9. Do you believe it is important to plan for the future of university development?**

The idea that things go back after the campaign is wrongheaded. We are so intent on completing the campaign that we’ve not had time to plan. The idea of “going back” is largely an assumption from some Foundation members based on their inexperience. There’s no doubting the importance of on-going stewardship.

The consequence of not planning is unthinkable. Development is planting a seed that doesn’t come to fruition until much later. We have to have a plan – what gets measured gets done. The Commission needs to name and claim the importance of planning.

If you expect to survive, it’s a requirement. What are the choices? We’re not going to get more state revenue. If we want to be the University we are now, we have to plan. Otherwise, we become just another “good” school. Should commercial entities be

exploited to a further degree? How can we maximize commercial entities to throw off more revenue?

You don't do anything successfully without a plan, including long term and short-term goals, infrastructure goals and construction goals.

Without a doubt – without a plan you just go in circles.

Very important. The Commission's work needs to be fully communicated with boards and constituencies. The plan needs to be transparent and detailed enough to tell stories, to know how it has been and how it could be like, why the amount of change or lack of change going forward is appropriate. There needs to be enough detail to show the conclusions have been analyzed rather than accepting the status quo.

Depends on what you want to accomplish. It is best to plan with the community engaged. The plan is going to dramatically include on-going effort from the community in ways that are not used now (ex. press, citizens).

**10. If you were grading Fresno State's private fundraising on the basis of progress over the last 5 years, what grade would you assign? Why?**

A+

With regard to the foundation I serve as president, I would assign an A. We received the single largest cash gift in the history of the Cal State system. The success was based on the donors' relationship with a faculty member.

B+. We have developed a stronger culture of identification of prospects all the way through to gift giving; however, it is not as disciplined a pipeline as it needs to be. We're much better at it, but the process needs to be institutionalized. We need to exploit more fully the corporate environment.

B. We do some things very well. Follow-up is excellent. Cross marketing is not as good. Coordination between athletic and academic fundraising is poor and could be improved. There doesn't seem to be a lot of *intentional* cooperation. You would want this. I've never met personally with someone in development in another area.

B-. We did not have the infrastructure in place, but we've accomplished that in the last five years. Territorial and turf issues in the University continue. You must have a passion for the University if you're going to be successful here.

B+. In the business school, we have achieved things that peer institutions could not achieve. I'm a driver for the next best thing. The epitome of generosity was the Jordan gift.

Overall, A. If we don't hit the goal, it's nothing to be ashamed of, and we should extend the campaign based on the economy.

A-. There was a weak infrastructure for fundraising until 5 years ago. The development operation has been very effective; I don't know if it's been very efficient.

**11. Have you had a personal connection to/contact with the university's development operation? (If yes, can you describe or characterize that experience?)**

There is a good flow of information from development officers to volunteers. I'd love to see job descriptions of development officers and what their expectations are. Clearly, the development office wants to be better.

I have been connected as a Bulldog Foundation member, holder of seats in the stadium for 30 years, involving in donating to the wine program, a corporate donor to the Foundation for the chair in the wine program. This community is a winning community. If we are winning in sports, they give; if we are not winning, they don't give.

**12. In general, what perceptions do you believe are held on campus, in the community and on campus boards about the university's fundraising operation and its organization?**

Donors, volunteers with colleges and programs, and directors of development feel engaged. Those who are not engaged are largely uninformed about the operation, how it works and why it is needed.

Alumni that I am aware of are very proud; nothing negative.

The operation is seen as OK ~ not great, not bad. People just think about the big gifts they see in the paper. They don't see the gifts we missed or the years of work that can go into securing a gift.

Not perceived to be strong. No specific negative feelings. Athletic fundraising is based on winning and losing; the academic side of the University does not have the same issue.

Perception has changed in the last 5 years. Deans and the leadership of colleges are much more aware and enthusiastic about the importance of fundraising. There are others who haven't got it - they don't see it as part of their job description. Some in the campus community see the Foundation as a stumbling block; this needs to be overcome. We have to get to the point that the Foundation is seen as a partner in achieving the University's goals. And we must keep in mind that the public does not distinguish among the different foundations and units - they just understand Fresno State and paint us all with the same brush.

The big gorilla is the constant push with the athletic department. Like the push back from ticketing at the new stadium. Any *part* of the University is the University - you can't just brush that issue off as athletics. You always have to be aware of this. The difficulty is that regional resources are strained.

**13. How do you know if a fundraiser is successful? Are there common sense metrics that you would employ?**

What is the philosophy of accountability for a development officer? Make the right steps every day. Avoid dollar goals. If there's too much emphasis on short-term results, people will feel the pressure and resist. Is the campaign goal being reached? Stewardship is

90% of a development officer's job. You must keep in mind in any campaign that another campaign is coming.

A successful fundraiser is immersed in the work. They are tied heart and soul to the priorities of the enterprise. They are a source of ideas and energy. Sensibilities of the fundraiser are essential. I do not look at metrics, but at dynamics. This pays off metrically.

There are *process* elements and *outcome* elements. Successful fundraisers create relationships and cause these relationships to flower. But dollars raised should not be the only metric.

Did they get the money? What surprises me most is the notion of not having a quota with a plan behind it. I don't know what type of reporting exists. This would lead to an understanding of what resources have been dedicated to achieving the goal. This requires an operation – fundraising really is about sales. When you have a customer-centric model, you become a trusted advisor. The relationship manager should be able to hand over to the “sales manager” a well-qualified candidate.

A successful development officer is respected and is someone people want to be around. The development officer needs to take on the traits of other people in order to be in line with them. A successful development officer is *appreciative*, and I believe we do a good job of that. Development is a customer service business.

Determine success by having a goal. Did you get a return on your investment? A misconception of many is that we are scared by the “0s”—the person who gives \$100 is just as important as the person who gives \$1 million. How do we leverage giving to the next level?

If you're getting positive feedback from the community and if you're attaining your goals. (Development goals include donor satisfaction as well as money.)

#### **14. What is your understanding of the role played by ancillary foundations or entities, such as the Ag One Foundation, Bulldog Foundation, and Alumni Association?**

Should be closer coordination and cooperation with foundations. This has improved over the last five years. The Ag One and Bulldog foundations and the Alumni Association have existed longer than the development operation.

Problems evolved as the result of assumptions that became articulated facts that were not challenged or corrected. These assumptions become *de facto* policy as they played out. The structure itself is not the problem; a structure for proceeding that maintains the capacity to clarify and offer information and be respected as experts is important. This university is better than most because we are so connected to the community. Job creation is an important initiative – there is a high level office of Community & Economic Development. In that way we are quite visible as a community partner. John Welty has been here for 20 years, and he has been building that relationship. In today's academic environment, it is highly unusual to have a president serve for 20+ years.

No strong understanding. Ag One and Bulldog foundations are mostly fundraisers for those departments.

All are alumni constituent foundations. You don't want rogue foundations, nor do you want them working at cross-purposes. They are a coupled federation doing the best they can to develop their constituencies.

I believe we're all *one*, but the perception is that the foundations are competitive among each other and that cooperation between departments is lacking. I'm pro Fresno State. The University is missing entirely the marketing opportunity created by a successful athletic program. There needs to be back-and-forth between athletics and academics. Athletics is our *stage* for all development. Cross marketing is key to our successful future.

I'm able to be loyal to the part of the University that most touched me. The boards themselves are very self-centered - we look at our piece of the pie and do not want to share. We need to get some schools to step up their function. Why wouldn't every school at least have an alumni group? Last count there were about a dozen support groups. What prevents the business school model from working for *every* school? What are the characteristics that cause the model to work in business, education, ag, engineering, and not in others?

There has to be coordination. Foundations should not have to lose their identity as an organization, but they cannot operate in a vacuum. How do you have five members of a family wanting to do their own thing, but being proud of being the same family? How do you feed them intellectually and emotionally? It is important that this experience gives something back to each of the foundations in a way that helps to make each of them better.

**15. What is your understanding of the role of volunteers in the university's advancement efforts? Can you name any Fresno State volunteers who have distinguished themselves? What do you know about them?**

The independent operations are doing good things. The Alumni Association should get a lot more support - they are "planting the seed." Need better coordination among all development staffs. Every director of development has a volunteer liaison on the campaign steering committee. This is a good idea and should exist with all foundations as well.

Some volunteers have been excellent, some not so good. I don't think they are key to advancement success. They are important in making connections, but we can't assign any amount of campaign success to volunteers.

I am aware of people who have buildings and programs named after them, and I am aware of athletes who have become major donors. In fact, almost everyone in my line of work in the community is a Fresno State graduate.

Alumni continue to return and volunteer for the University. Some volunteer-driven events include wine tastings, the April "Common Threads" luncheon, and the September Ag One Boosters Bar-B-Q.

Volunteers are critical, and we don't use them as well as we should. Volunteers can connect the University to those who give - they are important in providing introductions.

Volunteers give advice, counsel, pulse checks, direction; they assist in fundraising if they feel comfortable to do so. Some have a hard time asking a friend for gifts, but they can be very helpful with establishing relationships.

**16. Do you believe it is important to successfully complete the Campaign for Fresno State in June 2012? (Why or why not?)**

Yes. Not crucial, but important. I am feeling optimistic since I know some of what is in the pipeline.

**17. After the campaign concludes, what happens to private support for Fresno State?**

Development is really about human relationships, and it is at best unpredictable and can change dramatically. The capacity to be flexible is more important than a well-schematized plan. Stewardship is the ability to talk the language and interest of the donor.

A soft underground movement needs to continue. Stewardship continues. The campaign is just the “splash,” but the effort cannot let up. One of the outcomes of the campaign is the training and development of the *next* generation of fundraisers and volunteers for the University.

The driving force in people’s decision to give is *when* people want to give. We need to be on the front step at that time. *Nothing* will stop when the campaign ends.

Keep your foot on the throttle! Fundraising is critically important. We must continue to develop contacts/relationships and go out there and raise money! We should maintain the same staffing level in order to get more money in. We must maintain an emphasis on stewardship. You do not go into defense when you’re winning the game!

Development operations revert to a business as usual mode ~ setting more annual goals, more project-oriented fundraising. What do we need to take us up a notch? What would be the negative impact of shrinking the staff? The campaign should result in a huge pipeline of prospective donors. We need something as aggressive as the campaign, but structured differently since we need support for operations. We need a gifting model for small donors other than the annual fund.

It never stops; it just gets redirected. The environment does not allow us to stop. We have to create new energy and new excitement. We always have to be present and be appreciative when the right time comes for a donor to make a significant gift. And that time may not be related to the timeline of a campaign.

It still needs to function. It doesn’t stop. We won’t do the campaign counting and reporting. How do we keep the pipeline pumping? Should there be specific annual goals? How do we continue to build dollar support without the one-time “special” gifts?

There are things we are doing now that we need to continue – it has to do with Advancement as interpreter of the University’s mission. Instead of a “campaign,” we need an on-going development effort that builds on what we have accomplished and carries it forward into the future. How can successful development efforts throughout the campus be modeled for the whole campus going forward? How can success be the *norm* rather than the exception?

**18. What colleges or universities do you admire for the success of their private fundraising? Are you familiar with how they are organized for that success, or do you just admire the result?**

Nothing to compare to – would like to know about others in the Cal State system.

No one stands out.

Duke (my son went there)

Johns Hopkins (my *alma mater*)

UCLA (my *alma mater*)

Stanford

USC

Loyola Marymount

Texas A&M

UNC Chapel Hill

Washington University in St. Louis

None

**19. What types of things – structural or organizational or leadership or aspirational – hold back Fresno State?**

Nothing in particular.

Whatever direction we go with advancement, I hope we do more to help the faculty and staff understand that every time they open their mouths they are representing Fresno State. Internal politics, when filtered out to the community, undermine Fresno State.

Also, how students feel about their relationship with the University while they are students is key to their future support.

We're not a UC; there's not a lot of pride in going to Fresno State. The community is *grateful* for Fresno State, but not *proud* of it. We're a commuter campus. Where are the shared experiences outside of sports?

The President needs to take a stronger position in re-emphasizing the importance of non-state funds. There needs to be more coordination and cooperation among development directors. We need to look more intentionally at legacy giving.

Athletics vs. educational aspects – people don't understand the trade offs.

**20. How involved would you like to be in the work of this Commission?**

As active as time allows; fully utilized. I want to help ensure that this is successful. I want to know what my counterparts are doing and thinking.

Testimonials need to be a big part of what we do as commissioners.

**21. What are your thoughts about the timing of the Commission and the nature of activities it will employ in completing its work?**

We would all benefit from hearing from each other the stories about moments when a fundraiser, dean, or volunteer made a big difference and something outstanding happened. Good idea to have our successful fundraisers, deans and volunteers come to the Commissions and tell stories about how they succeeded.

The campaign is a catalyst for a model that will take us to the future. We need to build on that.

**22. What would you like to tell me about your relationship with Fresno State that best summarizes or characterizes that relationship? What are you proudest of in your relationship with Fresno State?**

I have assimilated into the system and gained the confidence of my colleagues in coming to me with estate questions. I have successfully stayed out of the grapevine and rumor mill.

Regional engagement - our commitment to solving regional problems. A Congressional study called the central valley the Appalachia of the West. We are responding to community needs with programs that rely on soft dollars.

I am proudest of my association with the Ag One Foundation and the way I have been able to leverage John Deere operating here (March 3, John Deere reps. will visit.)

My personal relationship with Fresno State is that it gave me a start in my career. I am proud that we are succeeding in spite of being underfunded and underbudgeted.

Sixty members of my family have attended Fresno State. My kids all graduated from here. I am very proud of the outstanding wine program in the Ag School.

Loyalty, commitment, care for the future, success, integrity and image. I grew up at Fresno State. People I've had the opportunity to know, learn from, work with have been great. I am always proud to be a Fresno State alumna. I look at my role on staff as asking "How can I make Fresno State better?" We know why we're here, and we appreciate that we can be of service.

My relationship with John. Most gratifying have been the occasions I have been teaching here at different times and different topics; the opportunity to change people's lives (story of Portuguese student now with CISCO Systems.)

**23. What information might I provide after this meeting that would help you be your best as a commissioner?**

What would help me most is clarification of some elements of the President's charge and inconsistencies in vocabulary. Restate each of the elements of the charge in 1 simple sentence.

Preserve confidentiality and be discreet while providing me a perception of the Commission's thinking.

As much specific information as possible. More detail on the time commitment.

Introductions and short bios of all members of the Commission. Organizational charts and materials to let Commissioners know how the system works.

Anything and everything, including names of people at other schools to contact. How does structure cause things to slow down? How do other types of institutions, such as hospitals, succeed?

**24. How can I help you to know me better so you can receive and hold my counsel with trust as the Commission goes about its work?**

Provide a calendar of meetings as quickly as possible. The spring will get busy quickly.

Keep me abreast of on-going conversations. E-mail me.

**Notes from meeting with Lori Redfearn:**

The Foundation is trying to understand what their level of financial commitment should be going forward after the campaign ends.

Lori works on standards to determine return on investment, what counts, looking at data that can be compared across the system.

The Foundation questions whether other auxiliary organizations across campus are meeting their share of the overall costs.

Lori's office produces two reports per year: (1) Fund raising report (she will send me a copy); (2) Expenditure data analysis for Advancement (this is yet to come for this year).

Fresno State is in tier III campuses. Its peers are: Long Beach (in the quiet phase of a campaign), Cal Poly SLO (has had a comprehensive campaign and is planning their next campaign), and San Diego (2 years into the quiet phase of a campaign. They are further along than Fresno, Long Beach or Cal Poly SLO because they invest 3 times as much in development). There is not a history of comprehensive campaigns for the Tier III institutions.

January 25-26. Board of Trustees meeting with an executive summary of the "Auxiliary Task Force" with the full report in February.

Peers outside of CSU: UNLV, Utah State, Boise State, U Wisconsin - Milwaukee, Colorado State. We have data on their fundraising, but we do not have data on their investment in their programs.

Aspirant institution: Oregon State

We measure overall gift receipts vs. the number of fundraisers.

We try to express to people that development is a relationship-building endeavor.

There were no estate or testamentary gifts for Fresno State last year. (Clarify if this is correct.)

Fresno State has had more difficulty than other campuses in identifying wealth among its alumni.

Campuses have been struggling over the past decade to get up to 2% of appropriations for advancement.

The system encourages all gifts to go to the auxiliary organizations.

What is unusual at Fresno is there being three separate foundations.

Each auxiliary unit has an Operating Agreement with the University, and these are reviewed every 5 years.

**Background information, benchmarking information, data, statistics and reports requested by or for Commission members:**

1. Most recent Fresno State Annual Report.
2. Most recent annual reports by Fresno State's affiliated foundations.
3. A brief history of organized fundraising at Fresno State.
4. Most recent Cal State system annual report.
5. Fresno State's 5-year endowment performance report and growth of endowment by contributed assets.
6. Mission statements of development, foundations, auxiliary enterprises.
7. VSE report for past 2 years, plus University Development office notes and comments on same.
8. Glossary of terms related to development.
9. Fresno State's strategic plan.
10. Cal State system "Auxiliary Task Force" report.
11. Statistical analysis of fundraising effectiveness at Fresno State.
12. Fresno State's peer group fundraising comparison report.
13. One or more books, white papers or reports for general understanding by Commission members.
14. Recent university economic impact study or report.
15. Commercial entities affiliated with the University, and what they "yield" to the University.
16. Sample Fresno State development director/officer job descriptions and examples of their goals and metrics for success.
17. Percent of university presidents nationally who have served for 20+ years at the same institution (get from CASE).
18. Characteristics of Fresno State's most successful fundraising operations in foundations, schools or auxiliary groups.
19. Is there a study that claims to show the economic difference (lifetime earnings) between UC system graduates and CSU system graduates?
20. It would be valuable to hear or receive testimonials from Commission members who have stories of closing important gifts, making significant gifts, or working with major donors.
21. Introductions and short bios on each commission member. Do not assume everyone knows each other.
22. University development organizational charts with staffing levels for each.
23. Calendar and timeline for the Commission's work.
24. Most recent annual fundraising report that Lori Redfearn's office produces at the system level.
25. Operating Agreements between foundations/auxiliary units and Fresno State.

## **Restatement of elements of the President's charge to the Commission to Plan for the Future of University Development**

*(Goal: restate each element of the charge in 1 simple sentence.)*

1. With a brief history of private fundraising at Fresno State as a background, what lessons can be learned from the Campaign for Fresno State that inform planning for the future?
2. What level of priority should Fresno State assign to private fundraising and why?
3. What "best practices" are found in development programs and campaigns at peer and aspirational universities?
4. Using information gleaned in #3 (above) and experiences at Fresno State, recommend a comprehensive University-wide development organizational model including all schools, programs and affiliated foundations.
5. How can the University best welcome, mentor, support and appreciate volunteer efforts on behalf of Fresno State?
6. What are ways to fund University development at the priority identified in # 2 (above)?
7. Recommend methods for evaluating and measuring development program effectiveness.
8. What core advancement services ~ accounting, receiving, receipting, prospect research, reporting, tracking and stewardship ~ are necessary to support appropriately the University's investment in development?
9. Define a timeline for implementing Commissions' recommendations accepted by the president.