

TO: University Budget Committee  
FROM: Janet Levine, Vice President for University Advancement  
DATE: May 4, 2007  
RE: PEC Documents

Attached please find our PEC documents (reports for each of our areas: Development and Alumni Relations, Communications and Public Relations, Government and Community Relations, and Advancement Services as well as our combined PEC report), the PEC committee's response to our PEC presentations, and our response to them.

University Advancement is important to the health of this campus and the PEC committee's recommendations should be closely considered. University Advancement provides a number of services that are critical to the success of CSUDH's efforts to increase enrollment and support from private sources and improve the public perception of the CSUDH.

Over the past year, new leadership and vision has brought needed changes to UA. However, we still find ourselves unable to provide the kind of support to the campus that is urgently needed. For example, I have sat at numerous meetings where printed materials from other campuses are passed around as samples of successful campus communications, and I am acutely aware that we are not producing publications that promote the university effectively. The reality, however, is that while we have the talent to develop high quality publications, we do not have the resources within UA to print or disseminate such materials. We have a vision for our website, but our resources are so thin that overhauling it in a way that would better reflect our campus and attract more potential students to the site is proving to be a slow and difficult process.

On the funding side, though we have increased the number of donors significantly, we do not have the wherewithal to reach large numbers of alumni and friends who would give if we ask. Our development staff of three (plus a small amount of my time), is simply not adequate. Beyond that, we lack the financial means to mount the kind of programmatic efforts that would help to identify future major donors. Investment in these areas by the campus would bring a tremendous return. Studies by the Chancellor's Office show that it costs \$1 to raise \$5...every \$1,000 provided to the development area of our division would yield \$5,000 in the short run, and much more in the future.

We believe that by investing in University Advancement and continuing to improve Advancement's ability to increase donor and alumni support, and promote the University, the rest of campus will greatly benefit.

TO: University Advancement PEC Committee  
Greg Saks, University Advancement Representative (Chair)  
Carol Bosman-Anderson, Student Affairs Representative  
Danny Donayre, Student Representative  
Steve Jenner, Faculty Representative  
Jean McTaggart, Administration & Finance Representative

FROM: Janet Levine, Vice President for University Advancement

SUBJECT: Response to Feedback from PEC Hearing/Documents, 4/27/07

DATE: May 1, 2007

Thank you for the hard work and careful analysis that went into the Committee's recommendations to University Advancement. This has been a busy and exciting year for the division and it was gratifying to note that the committee recognizes the strides we have been able to make thus far.

Overall, I am in agreement with the recommendations made by the committee. Indeed, in some cases, we have already begun addressing these issues.

1. **Enhance On-Campus Communications** – We completely agree with your assessment that not enough on-campus people understand who we are and what we do. Toward that end, we have been visiting various college councils and have arranged for meetings with the Council of Deans. We have plans to request time in front of Academic Senate as well as other groups on campus. Following the example of Administration & Finance, we plan on disseminating our UPC reports widely across campus and we are working to improve our website presence. Ensuring that our campus community is well informed of our plans, activities and successes is a primary objective for UA.
2. **Advancement Feedback Sessions** – This is an interesting idea, which fits our need to get campus buy-in regarding priorities for the areas which we serve. It would allow us, as a group, to hear directly from campus constituencies and to find out what concerns and issues we need to address.
3. **Outreach to faculty/student organizations** – This is definitely a case of preaching to the choir. I have always believed (and I know that the staff of UA feels the same) that faculty and students are not only what we are about, but are the best groups to tell the many stories of the campus to the external world. We have been trying to work with various student groups – for example, Brenda Knepper has become very involved with the HDC student interns as well as speaking to communications classes. I communicate regularly with the ASI leadership and have worked with student groups on their school projects. We are in the process of

developing our internal marketing program, which will clearly explain who we are and what services we offer to campus.

4. **Database:** As you so rightly point out, this (along with revamping our gift acceptance and receipting procedures) is our highest priority and we will work diligently to meet or beat our six month goal.
5. **Benchmarking:** Setting standards against which to measure ourselves is perhaps the most vital thing we can do in order to ensure that UA is successful. Toward that end, we have been working to identify peer organizations against which to measure ourselves. We are also identifying the benchmarks we need to measure and are looking to this year to set a credible baseline.
6. **Relationship between AEG & CSUDH:** As you rightly note, this is a larger campus issue. Since my arrival, we have been working to improve the relationship. Greg, Brenda, Michael and I have all developed relationships with our peers at HDC. We are trying to work more closely with them, and to focus on the positive aspects on the relationship and build upon those. I agree that there is much potential that we haven't even touched upon and it is something in which UA must take a proactive lead.

Thank you for your support of our funding requests. We feel that our requests are reasonable, and the minimum needed to provide the campus the advancement services it so richly deserves so that we can, together, help to ensure that CSUDH continues to offer quality education to our students.



California State University  
**Dominguez Hills**

**University Advancement PEC Review Committee**  
1000 East Victoria Street · Carson, CA 90747

**TO:** Janet Levine  
Vice President for University Advancement

**FROM:** University Advancement PEC Committee  
Greg Saks, University Advancement Representative (Chair)  
Carol Bosman- Anderson, Student Affairs Representative  
Danny Donayre, Student Representative  
Steve Jenner, Faculty Representative  
Jean McTaggart, Administration & Finance Representative

**SUBJECT:** Feedback from PEC Hearing/Documents

**DATE:** April 27, 2007

Thank you for your presentation at the University Advancement (UA) PEC Hearing that took place on Thursday, April 19, 2007. It was exciting to see that challenges within the division have been identified and that concrete actions have been made to grow University Advancement.

Overall, the Committee was very impressed with the strides made within the Division of University Advancement over the last year. In a very short time the University Advancement leadership has been able to identify the challenges, staff to the best of their financial ability to those areas, and develop a road-map for overall growth. We were also excited to hear, minus the support by Mrs. Loker, that even with low resources and having to focus on building infrastructure; UA appears on target to match the dollars raised last year.

Based on the presentation, information provided and our discussions the PEC Committee would like to make the following recommendations to University Advancement for consideration. They are not in priority order.

1. Enhance On-Campus Communication – The PEC Committee was impressed by the quality and volume of work being done by UA, but not enough on-campus people understand what UA is and the good work being done. Whether through presentations, newsletters, web-based, student email or other methods; getting buy-in from the campus community will help greatly in gaining more resources as well as an overall appreciation of the work being done by your staff.
2. Advancement Feedback Sessions – To make sure that there is a forum to gain a good understanding of the activities around campus as well as allow for regular feedback from faculty and students, it is encouraged that at least a two times a year sessions take place to encourage dialogue on the potential programs and activities of University Advancement. It would be a good idea to personally invite specific faculty and students when these take place so you can ensure an audience and that the issues/suggestions from these constituencies can be addressed.
3. Outreach to faculty/students/student organizations – By trying to develop programs, or simply making sure that students are integrated into existing programs, the quality of your messaging and activities will be improved. Knowing that no one can tell the story of CSUDH like the students or faculty, incorporating individuals and student groups effectively will help make our appeals

and communication more effective. Also through this outreach, it should be made clear that UA stands ready to serve as a consultant with student groups and other campus offices to assist with their advancement related activities.

4. Database - Because of references to past efforts to create a database that would allow University Advancement to better manage and use data, we recommend that this be the highest priority so your goal of it being up and running in six months can be reached.
5. Benchmarking - The PEC Committee was impressed with many of the statistics that provide insight on overall UA funding, but we encourage University Advancement to use benchmarking, against ourselves as well as other institutions, as an ongoing method of gauging our productivity and growth. Also, it should be noted that these are not just for fundraising, but also for the other areas within the division (communications, alumni relations, government relations, etc.).
6. Relationship between AEG & CSUDH – CSUDH has a unique partner in the Home Depot Center, but it appears that we have never been able to leverage this relationship fully for campus exposure or other non-financial benefits. Understanding that it is a larger campus issue, we encourage University Advancement to be an advocate for greater interaction with AEG and HDC so that our campus community can best take advantage of this unique partnership. This would include a plan to take advantage of the arrival of David Beckham in July of 2007.

The case made by University Advancement in regard to their funding was convincing. The fact that the resources committed to this area by the campus, in both dollars as well as percentage of overall budget, is one of the lowest in the CSU System and has been dropping over the last six years speaks to the challenges encountered by UA Leadership. The priorities presented by the Vice President, which include a second web development professional, an Annual Giving Development Officer, an Advancement Services Manager, a Media Relations Specialist, as well as the non-personnel needs are sound and certainly appropriate based on the desired results of the campus community.

Thank you again for the opportunity to review the activities of University Advancement and if you have any questions please don't hesitate to ask.

**DIVISION OF UNIVERSITY ADVANCEMENT  
PROGRAM EFFECTIVENESS AND BUDGET REVIEW PROCESS  
For Fiscal Year 2007-08**

- 1. Mission Statement:** The Division of University Advancement supports, encourages, and promotes the academic mission and vision of CSUDH by interacting with alumni, friends, and the greater community. Our goal is to engage and connect these constituents with the university to garner support and secure resources that will enhance CSUDH's unique place in higher education.
- 2. Goals**
  - Develop, implement, monitor and continuously improve systems, reporting mechanism and data infrastructure to support University Advancement and its customers' initiatives and operations.
  - To establish and maintain a sustainable and comprehensive development program for the enhancement and enrichment of CSUDH.
  - Build upon the existing alumni relations program, making it more relevant to a larger number of CSUDH alumni. Along with this, rebuild a viable and meaningful Alumni Association whose goals will be aligned with those of the University.
  - To develop and implement a strong, consistent brand for CSUDH that will appeal to our numerous constituencies
  - To develop strategies for improving the external perceptions of and knowledge about CSUDH and to increase outreach to these constituents.
  - To establish consistent lines of communications to and with our elected and appointed officials to further the legislative priorities of CSUDH and the CSU system.
- 3. Functions**
  - Advancement services, including gift receipting and stewardship
  - Development and fundraising
  - Alumni Relations
  - Communications, marketing, public affairs and media relations
  - Government and community relations
- 4. Services performed to carry out function**
  - Maintain complete and accurate database of alumni and donors.
  - Provide proper tax receipts for donors
  - Establish and maintain appropriate policies and procedures for all areas of UA.

- Provide assistance and guidance to all areas of campus regarding fund development activities, including the setting of campus priorities.
- Contact and cultivate alumni, connecting back to campus.
- Identify, cultivate, solicit and steward donors to CSUDH
- Provide professional expertise from design through editing in all areas of campus communications, both for print as well as electronic media
- Write, edit and disseminate news releases and articles regarding people and programs of excellence at CSUDH
- Facilitate advocacy both for legislation as well as programs that will benefit CSUDH
- Represent the campus at meetings and events.

**5. Recognized measurements/benchmarks**

- Accuracy of databases and ability to pull appropriate information and lists from these databases
- Participation rate of alumni, both in giving and involvement in campus-sponsored activities
- Number of prospects identified and cultivated
- Number of solicitations (individual as well as organizational)
- Effectiveness of communications
- Successful adoption of branding by all parties
- A coordinated legislative strategy that provides timely and effective responses to the University's legislative priorities.
- Number of key community contacts identified

**6. Functions/services whose effectiveness was negatively impacted in 2006/07 by budget reductions or deficiencies.**

- Since 1998, UA's budget has consistently declined, even in years when other divisions saw their budgets enhanced.
- Within the CSU system, CSUDH is considered a "group 1" campus. Universities categorized within Group I generally have less than 5,000 individual donors, less than 10 full-time professional fundraisers and less than \$25 million in endowment market value. These advancement programs are building infrastructure and are striving toward raising gift commitments that are equivalent to 10 percent of the state general fund allocation.
- Across the system, Group 1 campuses receive 2.76% of the State General Fund. At CSUDH, we receive approximately 1.9% of the budget--far below the average.
- CSU campuses that are in group 3 (have over 10,000 individual donors, over 20 full-time professional fundraisers, and between \$25 and \$50 million in endowment market value. These more mature

advancement programs have developed successful annual fund, major gift and planned giving operations complemented by strong alumni and communication programs. These programs are expected to raise gift commitments that are greater than 15 percent of the state general fund allocation) range in 2.29-3.46% of the operating budget being invested in advancement. The results of this investment are startling: Fresno, the low end of this spectrum, has an endowment of \$94,485,000; SLO, at the high end, has an endowment of \$148,861,122. Our endowment is \$5,959,629. The tier 3 campuses are raising between \$20-47 MILLION each year, while we are struggling to raise over \$1 million.

- Perhaps more to the point, it costs us 28 cents (and I think this number is low; historically we have misstated our spending on development, showing far less than we actually spend) on average to raise \$1. It costs SLO, 8 cents.
- In large part due to the lack of investment in UA, our fundraising has been well below target. Indeed, if it weren't for two donors – Mrs. Loker and AEG – our fundraising in the prior 4 years would have been well below the \$1 million mark.
- The lack of professional advancement services staff has created a number of problems in gift receipting, stewardship, donor tracking and donor research, all of which have had extremely negative effects on our fund development abilities.
- Similarly, appropriate and effective policies and procedures have not been established or maintained in all our areas.
- Lack of professional fundraising staff has not allowed for the establishment of a comprehensive fund development program.
- Lack of resources has exacerbated the above problem, even as an AVP for development and then, recently, two fund raisers have been brought on board. Basic fundraising methods, such as direct mail, have been impossible due to lack of budget to pay for printing and postage.
- The loss of an event professional has required the AVP to spend major portions of his time on the president's scholarship benefit instead of being able to focus on developing a comprehensive fund development program, building a prospect pool or cultivating and soliciting those already identified prospects.
- In our communications area we have one writer and one web content manager – both areas that are extremely labor intensive and would benefit from additional bodies to perform these basic yet vital functions.
- Lack of resources has also prevented us from using printed media to reach out to external constituencies.

- For many years there was no dedicated government relations person. As a result, our legislative program has been fragmented and while we have received a number of earmarks this has been done by using centrally monitored funds to hire a lobbyist. His effectiveness has been minimized because of the lack of a coordinated structured program.
- There has been no coordinated outreach by the University to elected officials and staff who represent our service area.

**7. Functions/services whose effectiveness or efficiency was improved in 2006/7**

- 2006/07 marked a radical change in UA with the hiring first of the AVP for Development, the VP for UA and, since January the Director of Communications, Director of Government and Community Relations and two Fund raising professionals. We have also promoted one secretary to a database coordinator position and another gift receipting clerk to become our budget manager. Note that these hires (with the exception of the VP) either replaced long unfilled but budgeted positions or were cobbled together by not replacing personnel who left (such as our media relations person) and creating new positions.
- We have embarked on a concerted effort to create an effective advancement services program – starting with redesigning our gift receipts and streamlining our gift receipting process.
- Despite abovementioned issues, aggressive fund raising has resulted in increased fundraising success.
- The President’s Scholarship Dinner is below budget on spending and above fundraising targets – this will result in significantly more funds for scholarship opportunities for our students.
- Improvement of office processes and procedures has provided better service in all our areas.
- Identification of areas which need improvement and development of plans for that improvement
- Successful lobbying days in Sacramento and Washington

**Functions/services that, in 2007/08, would be enhanced for improved effectiveness/efficiency were additional financial resources made available –** Please note that those marked with an (A) are ones which we believe are critical at this juncture. Others could more easily be phased in over time.

Function / Service	Description of Enhancement to Effectiveness/Efficiency	Estimate of Financial Resources Required in 2007/08 to Permit the Enhancement
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<b>Personnel</b> An Advancement Services Manager (A)	Professionalize and increase effectiveness of extremely important functional areas – gift receipting, donor and alumni tracking and prospect research	Salary and benefits for one person
Development Officer: Annual Giving	Focus on this important component of Fund Development which allows us to raise operating funds as well as develop a viable prospect pool for major gifts	Salary and benefits for one person
Coordinator for events/stewardship	These two elements are vital pieces of a strong, comprehensive development program; someone focused on these would not only enhance the program but would free up fundraising staff to focus on their core mission of raising money for the university	Salary and benefits for one person
Scholarship Development Officer/Manager	Scholarships are extremely important to our students (as well as to helping to increase enrollment and to enroll the best students for our campus). It is, therefore, necessary not only to raise scholarship dollars but to ensure that these dollars are getting into the hands of students and that the donors and their scholarship recipients get connected	Salary and benefits for one person
Development Officer	Fund raising is a contact sport; the more fund raisers we have – especially those focused on higher end fundraising – the more successful we will be	Salary and benefits for one person
Web Development Professional (A)	The web is our primary tool for marketing, recruitment and information about CSUDH. Currently, we have one person responsible for Web Content Management. We need a second, more design-oriented person to assist getting and keeping our website to the highest professional standard	Salary and benefits for one person

Media Relations Professional (A)**	We have been unable to fund replacing our media relations person. This negatively affects the placement of positive news about CSUDH in local media.	Salary and benefits for one person
Web Consultant (A)**	Short term web development needs, particularly as relates to an intranet site	Estimated cost: \$30,000
<b>Non-Personnel Needs</b> Additional resources for scrubbing and converting old alumni records (those not on Banner) and getting onto new donor and alumni database (A)	This would allow us to begin cultivating our oldest alumni – those most likely to be larger donors.	Funds to convert data to a digital format; scrub and move into our donor/alumni tracking system. Cost estimate: \$50,000.
Database training for staff (A)	Would professionalize and increase effectiveness of extremely important functional areas – gift receipting, donor and alumni tracking and prospect research	Estimated cost for workshops and staff development: \$3,000
Funds for the execution and growth of a phonathon program	Phone programs are one of the most effective ways to feed the rest of a development program. They can provide prospects for major gifts, connections into corporations and planned giving prospects as well.	Estimated costs for functioning phone program: \$30,000
Direct Mail Program (NOTE: The most effective method for direct mail solicitations is if they are mailed regularly. If we contact someone only once a year, the likelihood of their support CSUDH is minimal. We need to make sure we are in touch at least quarterly for best results)	As with the phone program, these types of solicitations help identify donors that feed the other areas of development. It is also a help in keeping our database clean.	Estimated costs for functioning direct mail program: \$25,000
Donor Recognition	It is always easier to keep donors that make a new one, so it is critical that we thank those that have supported CSUDH in the past. The resources for these types of programs are not vast and will go a long way in keeping our donors from returning again and again.	Estimated costs for donor recognition activities: \$15,000

Funds to produce and distribute publications about CSUDH to various constituents	Currently, there are no print media produced for the campus, development or alumni relations that go out to our outside constituents.	Estimated Cost for production and mailing: Depends on number of publications, style of publication and number of copies mailed. Any additional funding over \$10,000 would help to begin the process
Travel expenses to Washington, DC (A)	to meet with House/Senate staff members, federal agencies and associations on a quarterly basis	\$4,500 3 additional trips to Washington, includes airfare, hotel and meals
Hardware/Software upgrades	Regular upgrade of technology would eliminate loss of production time brought on by technology problems and failures	Estimated cost annually: \$8,000
Sponsorship of 2-3 major regional events at CSU Dominguez Hills	To bring opinion and political leaders to campus	\$4,000 for 3 regional events and an in-kind donation of CSUDH facilities
Hosting meetings of community-based organizations on campus	Bring awareness and familiarity of the campus to the members of these groups	in-kind donation of CSUDH facilities
University membership in additional chambers of commerce and sponsorship of 3-4 key chamber-related events annually.	To make sure that CSUDH has a presence in our various communities	\$4,500 (\$2,000 for additional sponsorships; \$2,000 for membership in Greater L.A. Chamber; \$500 for additional membership in smaller organizations (San Pedro, Harbor City, Lawndale)
Event: twice annual breakfast for media to meet UA staff and Deans	Enhance relationship with media and their understanding of University programs and people	\$250 per event
Professional Development such as conferences and seminars	Enhance skills of staff	\$1500-2000 per conference per person \$500 per local seminar
Quarterly hard copy mailings of CSUDH material (reports, view book, brochure) to key opinion leaders	Increase awareness	\$3,000 (\$750 per quarter for direct mailing to up to 500 people)

Attendance at professional meetings	Travel expenses for attendance at one national professional meeting per year, including HACU or AASCU.	\$2,000
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\*\* It would be possible to combine into one position for now -- as a senior editor who can work with web content and news stories.

**DIVISION OF UNIVERSITY ADVANCEMENT  
PROGRAM EFFECTIVENESS AND BUDGET REVIEW PROCESS  
For Fiscal Year 2007-2008**

**Advancement Services**

- 1. Mission Statement:** To provide necessary services to assist the office of advancement, including gift receipting, database management , prospect research, as well as managing the division's budget and accounting needs.
- 2. Goals:**
  - Plan, implement, monitor, and continuously improve donor relations and gift stewardship systems and processes. Provide stewardship reports for requested accounts, generate gift acknowledgement letters for donors, and maintain working relationship with development officers.
  - Plan, implement, measure, and continuously improve gift and biographical data entry with an emphasis on data accuracy and timeline.
  - Have a fully-functioning alumni and donor database that will serve as a tracking and development tool
  - Manage databases for government and community relations and public affairs
  - Have fully transparent and accurate divisional budgets that will allow the members of UA to maximize our resources
  - Provide timely and accurate tax receipts for donors
  - Develop an effective stewardship program.
  - Working with specific areas of UA, develop and implement policies and procedures.
- 3. Functions**
  - Work with others in UA and the CSUDH Foundation on gift processing and accounting
  - Maintain accurate stateside and foundation budgets for division.
  - Manage the gift receipting processes
  - Provide reports and lists for UA and other constituent groups
  - Manage call reports
  - Provide donor and prospect research to facilitate fund raising
  - Maintain accurate databases
- 4. Services performed to carry out function.**
  - Training on PeopleSoft and developing budgets
  - Identifying donor tracking system, managing conversation to that system

- Work with Development and the Foundation to ensure timely and accurate tax receipts for donors
  - Work with campus constituents to provide accurate lists for fund raising, alumni outreach, and other appropriate mailings
  - Develop and maintain system for call reports
  - Develop and maintain systems for tracking of pledges and payments.
  - Provide research on donors and others
  - Maintain files
- 4. Recognized Measurements/Benchmarks**
- Accurate and timely tax receipts
  - Ensuring that donors get appropriately thanked
  - Tracking pledges and ensuring donors are advised of pledge payment due date
  - Accurate and complete donor records
- 5. Functions/services whose effectiveness was negatively impacted in 2006/07 by budget reductions or deficiencies**
- UA has been without a database manager for a number of years. While staff tries to function, there is no one trained in Banner resulting in poor use of the system; ineffective gift receipting; incomplete records and inability to utilize those records for resource development.
  - There has been no funds for prospect research, which has limited our fundraising abilities
  - Policies and procedures are not in place and without a manager of advancement services, this necessary infrastructure has not be developed.
- 6. Functions/services whose effectiveness or efficiency was improved in 2006/07 – describe specific functions/services and the nature of the improvements(s).**
- We have begun streamlining the gift receipting process, which has been so cumbersome that donors have not received tax receipts or thank you letters for months. This has been significantly improved, with greater improvement anticipated over the first quarter of next fiscal year.
  - Gift tax receipts have been redesigned to better serve our donors as well to provide a mechanism where we can continuously receive updated data.
  - We have identified certain serious issues regarding our alumni data, and are working to rectify these. This will result in a greater pool from which to draw prospects.

- We are working on policies and procedures, and while it is going more slowly than we would like, we are making considerable progress and expect to have most necessary policies and procedures in place by the end of the second quarter of the next fiscal year.
7. **Functions/services that, in 2007/08, would be enhanced for improved effectiveness/efficiency were additional financial resources made available – describe each service/function, the nature of the enhancement(s), and the additional financial resources that are estimated to be required to permit the enhancement(s).**

They are noted below in priority order:

Function / Service	Description of Enhancement to Effectiveness/Efficiency	Estimate of Financial Resources Required in 2007/08 to Permit the Enhancement
1. Additional resources for scrubbing and converting old alumni records (those not on Banner) and getting onto new donor and alumni database	This would allow us to begin cultivating our oldest alumni – those most likely to be larger donors.	Funds to convert data to a digital format; scrub and move into our donor/alumni tracking system. Cost estimate: \$50,000.
2. An Advancement Services Manager who would be skilled in database management as well as prospect research procedures	Would professionalize and increase effectiveness of extremely important functional areas – gift receipting, donor and alumni tracking and prospect research (see 6 above)	Salary and benefits for one person.
3. Database training for staff	Because of limited resources, we have not hired staff members that have vast experience in these areas and instead promoted from within. This strategy only works if we are able to invest in their training.	Estimated cost for workshops and staff development: \$3,000.
4. Resources for Prospect Research	Would allow us to gain a better understanding of our prospect base and specific donors.	With the absence of a staff member, these services need to be outsourced to vendors. Estimated annual costs: \$10,000.

**DIVISION OF UNIVERSITY ADVANCEMENT  
PROGRAM EFFECTIVENESS AND BUDGET REVIEW PROCESS  
For Fiscal Year 2007-08**

**Office of Development**

1. Mission Statement: To provide and enhance external financial and human resources for the greatest needs of the CSUDH Community.
  
2. Goals:
  - Have a fully-functioning alumni and donor database that will serve as a fundraising tracking and development tool.
  - Redesign all policies and procedures (gift acceptance, gift receipting, clearance and solicitation)
  - Develop and follow individual area and master calendars that will include personal solicitations, annual fund (mailings/phonathon/email solicitations/etc.), alumni relations (events/mailings), planned giving (activities/mailings) and foundation relations (proposals/personal visits).
  - Reconstitute an Alumni Association that is relevant and aligned with the goals of CSUDH.
  - Refine system for the management and prioritization of University-wide fundraising goals.
  - Enhance the President's Scholarship Benefit in regard to dollars and attendees.
  - Begin the exploration of a philanthropic foundation.
  - To develop and achieve data-driven goals for all areas of development.
  
3. Functions:
  - Work with appropriate campus administrators and faculty on the acquisition of external funds for campus priorities.
  - Facilitate the management of campus fundraising priorities.
  - To serve as one of the primary ambassadors of CSUDH to different external communities.
  - Provide guidance to campus offices/groups on fundraising activities.
  - Develop connections to the local business, philanthropic and civic community that will result in external resources (financial and human).
  - Provide leadership for the development and management of a donor and alumni database.
  - Work with others in University Advancement and the CSUDH Foundation on gift processing and accounting.
  - Create and manage fundraising and alumni boards for CSUDH
  - Manage points of engagement, and subsequent cultivation, for alumni and donors of CSUDH with other areas of the campus.
  - Manage all facets of the President's Scholarship Benefit
  - Provide leadership on all alumni programming

4. Services performed to carry out function. Identify if service is campus only or serves external constituents.
  - Manage the expectations and the development of campus fundraising priorities.
  - Meeting with donors and prospective donors to gauge interest and ability to support CSUDH.
  - Regularly meet with different faculty and CSUDH representatives to gain a better understanding of programs, activities, needs, etc.
  - Serve as campus representative for civic, professional and philanthropic activities within the community.
  - Facilitate alumni interactions with the campus through the Alumni Association as well as individual contacts.
  - Contact and solicit alumni and other friends through various methods to facilitate their financial support to CSUDH.
  - Work with Deans and other campus representatives on the creation and/or management of advisory boards and individual donors.
  - Develop and manage tracking systems for alumni and donors
  - Manage all aspects of the President's Scholarship Benefit for maximum return. Both financially as well as through other benefits.
  - Create publications and brochures for the various aspects of the development and alumni program at CSUDH
  
5. Recognized Measurements/Benchmarks:
  - Number of contacts that take place between our campus representatives and donors/prospective donors/alumni.
  - Number of proposals (to both foundations and/or individuals) out for consideration.
  - Alumni Giving Participation Rate
  - Dollars raised (as reviewed in different ways)
  
6. Functions/services whose effectiveness was negatively impacted in 2006/07 by budget reductions or deficiencies – describe specific functions/services and the nature of the impact(s).
  - The Office of Development had been without a primary manager for over three years prior to the arrival of the Associate Vice President of Development in May 2006. Because of the absence of direction, all fundraising activities, outside of the President's Scholarship Benefit, basically stopped. The 2006/07 fiscal year was spent trying to again establish a development program that was previously mismanaged and poorly equipped with human and financial resources.

- In the 2005/06 fiscal year a decision was made to eliminate four college-based Director of Development positions. This meant CSUDH entered into the 2006/07 fiscal year with only the Associate VP for Development providing fundraising support for the entire University. While two development officers (one working in Special/Major Gifts and another in Annual Giving/Foundation & Corporate Giving) were hired in January/February, we need at minimum one more fundraiser (this one with a dedicated focus on Annual Giving) to have a fully functioning development operation. It should also be noted that three years ago we had a Director of Annual Giving, but upon his resignation, the position was not filled.
  - As a result of budget cuts in 2005/06, the Director of Ceremonies and Events left the Division of University Advancement to work in Academic Affairs. This has required the Office of Development to hire a vendor to assist with our largest event (the President's Scholarship Benefit) and also leaves UA/Office of Development with the inability to host cultivation/stewardship programs that are critical for the creation of new donors and the retention of current ones. Also, because we are dependant on outside vendors to help support this large gala, we are placed in a difficult position annually determining how this activity will be managed. To make sure we are not annually looking for a vendor to assist with our event planning, and to help support the other stewardship programs that will assist with donor cultivation, another staff member with a focus on event management and stewardship is required.
  - Also as a result of budget cuts in 2005/06, a coordinator position working in Alumni Relations was eliminated. If those funds were re-established, we would redefine the position to focus on one of the most popular and relevant areas of fundraising: Student Scholarships. CSUDH needs a staff member that will be focused on attaining additional scholarships, managing the ones we currently have as well as providing donor recognition for those that support our students financially. Initially, this could be a part-time position working in the Office of Development, but he/she would also need to work closely with the Office of Financial Aid. The immediate "bang for your buck" on this type of position would be noteworthy through the organization of our current scholarships as well as potentially a substantial increase in scholarship support.
7. Functions/services whose effectiveness or efficiency was improved in 2006/07 – describe specific functions/services and the nature of the improvements(s).
- The Associate Vice President for Development was hired in May 2006. With new leadership, the Office of Development was able to aggressively pursue several fundraising opportunities which are expecting to result in the attainment of our 2006/07 fundraising goals.

- In January/February 2007, we were able to hire two new fundraisers. One with a focus on Major/Special Gifts and another managing our Foundation/Corporate Relations as well as our Annual Giving programs. In the few months they have been on board, these two have done an excellent job in the attainment of new prospects, the submission of numerous foundation/corporate proposals as well as being able to attain financial support from several people/corporations that previously had not supported CSUDH.
- One of the greatest challenges that the new Associate VP for Development discovered when coming to CSUDH was the state of our alumni and donor data. The inaccuracies and our inability to manipulate it in a useful way greatly hindered our ability to reach our goals. Also, we had no system for donor and prospect tracking. To address this issue, we promoted from within and created a database coordinator position. This person is providing management on a database conversation, working to clean the data that we current, as well as develop a plan for the integration of records that for numerous reasons have not been placed in the alumni database.

Please note that the database coordinator position as well as the two new fundraising positions was created using current budget.

- The Alumni Association at CSUDH has been dysfunctional for decades and certainly not aligned with the mission of CSUDH. To address this issue, President Lyons in February revoked University recognition with the Alumni Association. By doing so we will have the opportunity to examine other models and redesign an Alumni Association that will be a better fit with our ability to support their activities and have as their central mission the engagement of all CSUDH alumni.
- Creation and management of an overall development program. This consists of the creation and execution of a modest annual fund program (direct mail and e-solicitations), major gift (dedicated number of contacts/proposals to individuals and corporations), foundation relations (dedicated number of LOI's/proposals/personal visits to foundations), and planned giving (creation of marketing materials for direct mail/workshops on retirement planning/redesign of website).
- On track to have record profits from the Presidential Scholarship Benefit.
- Redesign of Office of Development webpage and initiated an online community for alumni relations.

8. Functions/services that, in 2007/08, would be enhanced for improved effectiveness/efficiency were additional financial resources made available – describe each service/function, the nature of the enhancement(s), and the additional financial resources that are estimated to be required to permit the enhancement(s).

They are noted below in priority order:

Function / Service	Description of Enhancement to Effectiveness/Efficiency	Estimate of Financial Resources Required in 2007/08 to Permit the Enhancement
1. Dedicated Annual Giving Support	See #6 above	Salary and benefits for one person.
2. Dedicated Event/Stewardship Support	See #6 above	Salary and benefits for one person.
3. Dedicated Scholarship Development Officer/Manager	See #6 above	Salary and benefits for one person.
4. Funds for the execution and growth of a phonathon program.	Phone programs are one of the most effective ways to feed the rest of a development program. They can provide prospects for major gifts, connections into corporations and planned giving prospects as well.	Estimated costs for functioning phone program: \$30,000
5. The most effective method for direct mail solicitations is if they are mailed regularly. If we contact someone only once a year, the likelihood of their support CSUDH is minimal. We need to make sure we are in touch at least quarterly for best results.	As with the phone program, these types of solicitations help identify donors that feed the other areas of development. It is also a help in keeping our database clean.	Estimated costs for functioning direct mail program: \$25,000.
6. Additional resources are necessary for events/activities that clearly thank those that have been supportive to CSUDH. These recognition activities would be focused on donors that have supported CSUDH at different levels as well as those that have indicated CSUDH in their estate plans.	It is always easier to keep donors that make a new ones, so it is critical that we thank those that have supported CSUDH in the past. The resources for these types of programs are not vast and will go a long way in keeping our donors from returning again and again.	Estimated costs for donor recognition activities: \$15,000
7. Another Individual/Corporate Development Officer	See #6 above	Salary and benefits for one person.

**DIVISION OF UNIVERSITY ADVANCEMENT  
PROGRAM EFFECTIVENESS AND BUDGET REVIEW PROCESS  
For Fiscal Year 2007-2008**

**UNIVERSITY COMMUNICATIONS AND PUBLIC AFFAIRS**

1. Mission Statement: The primary mission of University Communications and Public Affairs is to represent and build public understanding, recognition and support for the University. Working in partnership with campus entities we promote the University through the delivery of consistent messages that foster and reinforce a positive image of the University and its position as an urban center for teaching and learning, research, scholarship, creative activity and service. Using communications strategies and tools that include print, web and other media, we enhance communications on campus among faculty, staff and students; serve as the primary point of contact for print and broadcast media; inform local, regional, and national audiences about the news, events, people and programs of the University; and increase the University's national visibility.
  
2. Goals:
  - Create and implement a CSUDH branding program that includes visual identity guidelines for print and web that will enhance recognition and reputation of the University.
  - Develop and begin to implement a communications plan for the CSUDH website that enhances outreach, development and academic communications needs, and creates an intranet or portal that serves internal communications needs.
  - Develop and begin to implement a communications plan for CSUDH print publications that enhances outreach, development and academic communications needs. Determine whether funding is available for a regularly published tabloid that would be disseminated to internal and external audiences.
  - Develop a media strategy that includes guidelines for news and story coverage and the development of media lists that target the appropriate recipients for CSUDH news and events.
  - Develop consistent messages for the campus, specific colleges, Athletics and other programs that will serve to enhance the public perception of the University, and knowledge and understanding of our academic programs.
  
3. Functions:
  - University Communications and Marketing
    - Identity and branding for CSUDH
    - Marketing campaigns for campus outreach and college programs
    - Website design and content
    - Publications design and print coordination
    - Development and Alumni Relations communications
    - Photography services
    - Writing and editing services
  - Public Affairs/Media Relations
    - News coverage and feature writing for Dateline and CSUDH Newsroom
    - Media strategy and press releases
    - Media queries
    - University Messages
    - Media support for University events

4. Services performed to carry out function. Identify if service is campus only or serves external constituents (i.e. Chancellor's Office, off-campus organizations, etc.).

- University Communications and Marketing
  - Develop branding guidelines and templates for CSUDH. Disseminate for use throughout campus, provide trainings, and assist campus faculty and staff in use.
  - Develop print and web marketing campaigns for campus outreach and college programs.
  - Develop branded and well-designed web templates. Provide consultation to colleges and campus departments in content development, navigation, web standards.
  - Strategize on most effective publications for campus goals. Design effective print publications.
  - Work with Development and Alumni Relations to develop effective print and web communications to assist in reaching their goals.
  - Provide photography services for campus publications, the website, events, and media.
  - Provide writing and editing services to campus. Develop editorial guidelines for campus publications. Provide editorial guidance to campus publications produced by colleges and programs.
- Public Affairs/Media Relations
  - Write feature stories for Dateline and CSUDH Newsroom. Support Alumni and Development goals through strategically developing alumni, academic program, faculty and staff feature stories.
  - Write and disseminate press releases to keep the public informed about CSUDH events and news.
  - Respond to all media queries about CSUDH. Develop relationships with members of local media, hold events and news conferences that bring media to campus.
  - Develop University messages and work with colleges to develop messages and print/electronic communications for their programs.
  - Provide media support for University events by writing news releases, "Dateline" stories, creating publicity flyers or posters, arranging for info to be broadcast on electronic street sign, taking photos at events, and inviting media, alumni, and community members.

5. Recognized measurements/benchmarks.

- Major CSUDH marketing publications and website have consistent visual branding, and messaging.
- Top tier websites on csudh.edu use web templates that are branded, ADA compliant. Content is organized and included effective information and messaging for outreach and external audiences.
- CSUDH news releases consistently reach targeted media to enhance public perception, and alumni and development relations.

6. Functions/services whose effectiveness was negatively impacted in 2006/07 by budget reductions or deficiencies – describe specific functions/services and the nature of the impact(s).

- We have been without a Director of University Communications and Public Affairs for more than a year. This has resulted in a lack of direction and oversight for communications and public affairs efforts. The department staff has handled

the workload to the best of their ability, but ongoing assessment of whether the works meets the communications and public affairs needs of the University and strategic planning has not been taking place. Many of the colleges and university divisions have been handling media and communications themselves with little guidance in the areas of branding, messages, media relations that should come from our office.

- Media Relations/Public Affairs: In late 2006, one of our media relations staff persons resigned. We are now down to one writer writing all news and feature stories sent out to media lists and published on Dateline. There have been limited resources available to develop relationships with the local media.
- Publications: In late 2006, the printed campus tabloid, "Inside Dominguez Hills," was discontinued in order to reevaluate resources and the communications needs of the University. The publication targeted an internal audience – faculty, staff, and current students and was not reaching a broader external audience. Currently, we are producing only a biweekly "Dateline" electronic magazine. This goes out to our media list, the campus listservs, and is posted on the csudh.edu website. The University needs a printed publication that is produced regularly and disseminated to internal and external constituents to get news, stories, events out to a broad audience.
- Website: We have only one staff member providing oversight for the design and content of the CSUDH website. The website, in both look and content, is largely an intranet and needs to be redesigned to be a more effective outreach and information medium for the University. With only one staff member assigned to the web, the ability to overhaul the website is limited at this time. Funding should be made available for additional web staff.

7. Functions/services whose effectiveness or efficiency was improved in 2006/07 – describe specific functions/services and the nature of the improvement(s).

- A Director for the University Communications and Public Affairs office was hired in January 2007. With new leadership, the office has been better able to assess its infrastructure, process, and has been developing a strategic communications plan that will serve to enhance the image of the University and disseminate consistent messages about the quality of the campus programs, faculty and staff.
- Improvement of infrastructure and department processes. In April 2007, we hired a temporary Admin Assistant with media and web experience who has been assisting us in evaluating our website and targeting appropriate media with our news and stories.
- We developed and began to implement a project tracking system that includes project request forms and an Excel database to log projects. This has resulted in an ability to monitor deadlines, workloads, and campus needs more closely.

8. Functions/services that, in 2007/08, would be enhanced for improved effectiveness / efficiency were additional financial resources made available – describe each service/function, the nature of the enhancement(s), and the additional financial resources that are estimated to be required to permit the enhancement(s).

Function / Service	Description of Enhancement to Effectiveness/Efficiency	Estimate of Financial Resources Required in 2007/08 to Permit the Enhancement
1. Web Support	Enhance University web communications	Salary and benefits for one person.
2. Media Relations	Enhance dissemination of University news and cultivation of relationships with media	Salary and benefits for one person.
3. News tabloid print publication	Enhance dissemination of University news and stories to internal and external audiences.	Funding for bi-monthly issue (6 times a year).
4. Hardware/Software upgrades	Regular upgrade of technology would eliminate loss of production time brought on by technology problems and failures	
5. Professional Development such as conferences and seminars	Enhance professional skills of staff	\$1500-2000 per conference per person \$500 per local seminar
6. Event: twice annual breakfast for media to meet UA staff and Deans	Enhance relationship with media and their understanding of University programs and people	\$250 per event

**DIVISION OF UNIVERSITY GOVERNMENT & COMMUNITY RELATIONS  
PROGRAM EFFECTIVENESS AND BUDGET REVIEW PROCESS  
For Fiscal Year 2007-2008**

**UNIVERSITY GOVERNMENT & COMMUNITY RELATIONS**

**1. Mission Statement:**

The mission of CSU Dominguez Hills' government and community relations (GCR) program is to execute a consistent and coordinated outreach strategy that provided a direct link between the University and key political and community stakeholders to successfully advance the legislative goals of the University. GCR serves as a liaison between these key stakeholders and the University with the objective of raising awareness of the University and its critical role a leading educational, cultural and economic institution for the South Bay Area. GCR keeps these contacts informed of University's legislative and appropriations goals, facilitates opportunities for development activity, alumni, staff and faculty involvement and earned media opportunities. GCR builds meaningful partnerships with these stakeholders where possible and appropriate to achieve mutually beneficial goals.

**2. Goals:**

- To secure acceptance of the legislative priorities for both CSU Dominguez Hills, the California State University system and support for public higher education in general.
- To establish and maintain positive working relationships and regular lines of communication with elected and appointed officials and staff members who represent CSU Dominguez Hills at the city, county, state and federal levels.
- To raise awareness of CSU Dominguez Hills among targeted business, civic and cultural organizations in the South Bay Area.
- To facilitate board membership opportunities for faculty, staff and management with key community based organizations.
- To increase earned media coverage for the University through GCR related activities both on/off campus.
- To assist with facilitation of interaction between the University and the business community for development opportunities.
- To recruit additional alumni, volunteer and corporate representatives to advocate for the University's legislative priorities.

### **3. Functions:**

- To serve as the chief point of contact to elected officials and their staff members on matters of legislative or constituent concern.
- To provide feedback and strategic council to the University President, Provost and Vice President of Academic Affairs, Vice President of Advancement, Deans and other campus personnel on matters of legislative, political or community concern.
- To provide complete range of advocacy services to the University in order to influence elected officials to support the University's legislative and earmark priorities.
- To interface with contract lobbyist in order to advance University's federal agenda.
- To draft correspondence, talking points and briefing papers related to legislation.
- To initiate proactive campus meetings with elected officials and staff members.
- To recruit volunteer advocates to speak on behalf of the university's legislative priorities.
- To serve as a liaison to area chambers of commerce and member of government relations committee.
- To collaborate with University Development to assist with facilitation of fundraising opportunities.
- To link the University to community based organizations and associations to advance issues of mutual concern.

### **4. Services performed to carry out function. Identify if service is campus only or serves external constituents (i.e. Chancellor's Office, off-campus organizations, etc.).**

- Serve as liaison between the University and CSU's Sacramento and Washington offices.
- Coordination of University involvement in legislative lobby days in both Sacramento and Washington, DC.
- Drafting of correspondence for President's signature to elected officials in support of legislative goals.
- Preparation of talking points, memos and briefing materials for legislative meetings.
- Facilitation of faculty and staff involvement with community based organizations.
- Representation of university at community events and legislative public meetings.

**5. Recognized measurements/benchmarks.**

- Meeting targeted numbers of proactive legislative briefings.
- Timely campus response to legislation impacting both the CSU and public higher education.
- Completing required documentation for federal appropriations process and securing letters of support for projects.
- Establishment of quarterly Legislative Roundtable for elected officials, staff.
- Establishment of University Legislative Ambassador Program
- Hosting high profile community events, summits on campus.
- Recruitment of additional alumni and community advocates.
- Placement of staff of key boards.

**6. Functions/services whose effectiveness was negatively impacted in 2006/07 by budget reductions or deficiencies – describe specific functions/services and the nature of the impact(s).**

N/A

**7. Functions/services whose effectiveness or efficiency was improved in 2006/07 – describe specific functions/services and the nature of the improvement(s).**

- The full level of advocacy services was provided for CSUDH leadership during legislative lobby days in both Sacramento and Washington.
- Elected officials and staff are being invited to campus functions on a regular basis.
- Proactive meetings have been held with legislative staff members to introduce them to campus, our mission and priorities. Meetings will continue year-round.
- The university's contract lobbyist has been utilized more effectively and regularly.
- University is being represented at high profile community events throughout the South Bay on a constant basis, including before chambers of commerce.
- A strategic plan for the University's GCR direction has been drafted. Plans include establishment of Legislative Roundtable, hosting of high profile community events, summits, quarterly community e-mail alert and facilitation of coordinated faculty/staff community involvement.

**8. Functions/services that, in 2007/08, would be enhanced for improved effectiveness / efficiency were additional financial resources made available – describe each service/function, the nature of the enhancement(s), and the additional financial resources that are estimated to be required to permit the enhancement(s).**

Function / Service	Description of Enhancement to Effectiveness/Efficiency	Estimate of Financial Resources Required in 2006/07 to Permit the
Student Assistant	Greater levels of achievement and organization of #5 and #7	Stipend for one student.
Travel expenses to Washington, DC	to meet with House/Senate staff members, federal agencies and associations on a quarterly basis	\$4,500 3 trips to Washington, includes airfare, hotel and meals
Sponsorship of 2-3 major regional events at CSU Dominguez Hills	To bring opinion and political leaders to campus	\$4,000 for 3 regional events and an in-kind donation of CSUDH facilities
Hosting meetings of community-based organizations on campus	Bring awareness and familiarity of the campus to the members of these groups	in-kind donation of CSUDH facilities
University membership in additional chambers of commerce and sponsorship of 3-4 key chamber-related events annually.	To make sure that CSUDH has a presence in our various communities	\$4,500 (\$2,000 for additional sponsorships; \$2,000 for membership in Greater L.A. Chamber; \$500 for additional membership in smaller organizations (San Pedro, Harbor City, Lawndale)
Quarterly hard copy mailings of CSUDH material (reports, view book, brochure) to key opinion leaders	Increase awareness of University programs	\$3,000 (\$750 per quarter for direct mailing to up to 500 people)
Attendance at professional meetings	Travel expenses for attendance at one national professional meeting per year, including HACU or AASCU.	\$2,000

