1. Support Services Report Template

Report Info
Name of the person completing this report: Anthony A. Macias
Title of the person completing this report: Director of Planned and Major Gifts
Supervisor/dean reviewing report: Ara Serjoie
Service: University Advancement

3. Mandated Service

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1.1 Please indicate below if any aspect of the service is legally mandated by any of the following and provide the relevant reference.

Campus Policy: FUNDRAISING
Any other: CSU

Provide a brief explanation, if necessary, in < 60 words.
The CSU and each of the campuses is committed to encouraging philanthropy.

4. Importance of Service

Briefly describe the service in terms of its primary function(s) and purpose(s) using <120 words
Identifying and involving donors in the support of Cal State East Bay and its Mission. Including the facilitation of Planned Gifts.

Link to Scoring Rubric

2.1 Who are the primary receivers of this service? (Please enter the percentage of each user group that is relevant)

Students: 100%
Total: 100%

Link to Scoring Rubric

2.2 Please indicate the direct or indirect impact of the service on students for each of the three University Action/Student Impact Areas listed below (for example processing financial aid applications would be direct impact on students while managing utility services would be indirect).

<table>
<thead>
<tr>
<th>Direct Impact on Students</th>
<th>Indirect Impact on Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>✔️</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>✔️</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>✔️</td>
</tr>
</tbody>
</table>

Provide a brief narrative (<60 words each) explaining your selection for each area.

Evidence submitted to support the chosen selection (<60
### Link to Scoring Rubric

#### 2.3 Applying the four choices presented below, please indicate the consequence of NOT having this service on each of the actions in the left hand column.

<table>
<thead>
<tr>
<th>Action Description</th>
<th>4 - Service provides evidence of direct impact in more than one area</th>
<th>3 - Service provides evidence of direct impact in one area</th>
<th>2 - Service provides evidence of indirect impact in more than one area</th>
<th>1 - Service provides evidence of indirect impact in one area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td></td>
<td></td>
<td></td>
<td>![Tick]</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td></td>
<td>![Tick]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td></td>
<td>![Tick]</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Provide a brief narrative (<60 words each) explaining your choice.

<table>
<thead>
<tr>
<th>Action Description</th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each selection)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>Philanthropy to CSUEB is an indirect benefit to pre-college students. However, the potential direct impact is immense in creating scholarships, enhancing programs, improving and/or providing facilities, and heightening our role in comparison to other institutions.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>For some, resources provided by philanthropy make the critical difference in being able to attend college.</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>For many, the alumni network is the key to a career.</td>
</tr>
</tbody>
</table>

### Link to Scoring Rubric

#### 2.4 Alignment with Shared Strategic Commitments

How does this service contribute to or align with any of the eight Shared Strategic Commitments (SSC) listed below?

<table>
<thead>
<tr>
<th>Strategic Commitment</th>
<th>If aligned or contributing, provide a description. (&lt;60 words for each SSC)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reinforce academic quality through open-minded inquiry, innovative teaching, engaged learning, and distinguished scholarship</td>
<td>Fundraising for an institution includes the higher positioning of the institution so that thought leaders, faculty and students are encouraged to identify with the institution.</td>
</tr>
<tr>
<td>Enhance our inclusive campus, responding to the backgrounds and interests of our diverse community and promoting their</td>
<td>Philanthropy feeds on itself. The more donors &quot;invest&quot; the more is expected and the more will participate.</td>
</tr>
<tr>
<td>academic, professional and personal development</td>
<td>Serve students first, by expanding access and enhancing each student's educational experience and prospects for success as a graduate and life-long learner</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Foster a vibrant community through enriched student services and student life that support student engagement and learning</td>
<td>A true culture of philanthropy includes everyone at every level.</td>
</tr>
<tr>
<td>Contribute to a sustainable planet through our academic programs, university operations, and individual behavior</td>
<td>Philanthropy is aspirational.</td>
</tr>
<tr>
<td>Continuously improve our efficiency, transparency, and accountability while practicing mutual respect, responsiveness, and collaboration across the University</td>
<td>upward momentum inspires excellence.</td>
</tr>
<tr>
<td>Support the civic, cultural, and economic life of all communities in the regions we serve through partnerships that promote education and social responsibility</td>
<td>An inclusive, educated populace enhances individual vision and community expectation.</td>
</tr>
<tr>
<td>Demonstrate our continuing record of leadership and innovation in higher education, focused on 21st century skills, including science, technology, engineering, and mathematics (STEM)</td>
<td>STEM is the vessel which holds the content of thought.</td>
</tr>
</tbody>
</table>

**Link to Scoring Rubric**

### 2.5 How might the demand for this service change over the next five years? (Please choose one category below).

* Likely to increase

**Provide a rationale for your choice (assumptions, impact of new policy, etc.) in <120 words.**

As an institution maximizes the involvement and generosity of donors, more people join in on a “winning team.” The direction for our efforts will be to maximize tools such as charitable gift annuities, trusts, and other charitable gift planning vehicles that would yield significant transformational support to the university.

**Link to Scoring Rubric**

### 5. Quality of Service

**Link to Scoring Rubric**

### 3.1 Do you assess the quality of the service you provide?

* Yes

If “Yes”, what benchmarks, best practices or measures of success, either internal or external, do you use to measure service quality (e.g., timeliness, accuracy, adequacy, meeting deadlines, satisfactory completion of assignment, etc.)? Please describe in <120 words. If no, please explain.

* availability
* ease of use
* efficiency in achieving the desired result
* creating a legacy for others to build upon

**Link to Scoring Rubric**

### 3.2 During the last three years, have you adopted any measures to improve the quality of this service? Please describe in <120 words.

* Increased faculty and emeriti involvement.
3.3 What idea(s) do you have for improving the quality of this service within existing resources (e.g. development of benchmarks, surveys, feedback, etc.)? Please describe your plan(s) in <120 words.

Increased engagement by Emeriti faculty.

Link to Scoring Rubric

3.4 What ideas do you have for improving the quality of the service if additional resources were provided. Please describe your idea(s) in <120 words.

An increase in carefully designed events.
Communication materials to promote charitable gift planning.
Use of tools such as charitable trusts, charitable gift annuities, IRA rollover, etc.
Hosting estate planning workshops.
Working with attorneys and financial planners.
Utilizing charitable gift planning software.

Link to Scoring Rubric

3.5 Do you use any formal or informal process to assess the level of satisfaction of the service users?

Yes

If yes, describe the process and most recent results in <120 words. If no, please explain.

Word of mouth from donors is key to evaluating success.
Creating an unparalleled positive experience that will prompt interest for donors and prospective donors.

Link to Scoring Rubric

3.6 The university recently conducted a customer satisfaction survey for some services (results for this service are attached, if applicable). Do you have any comment or response to the results? Please describe in <120 words.

N/A

Link to Scoring Rubric

3.7 Do you have any formal or informal guidelines for personnel in your department regarding how to treat/interact with receivers of this service?

Yes

If yes, please describe in <120 words. If no, please explain.

Continual interaction with donors and "listening" to their concerns.

Link to Scoring Rubric

3.8 Does your service have annual goals (targets) of achievement regarding the quality of the service provided?

Yes

If yes, describe the annual quality goals (targets) and indicate if the service achieved those goals (targets). Please provide evidence, if possible, in <120 words. If no, please explain.

Dollar goals which reflect the willingness to support the institution.
3.9 Does your service have annual goals (targets) of achievement regarding the quantity of service provided?
Yes
If yes, describe the annual quantity goals (targets) and indicate if the service achieved those goals (targets). Please provide evidence, if possible, in < 120 words. If no, please explain.
Quantity of prospects reached as well as dollars raised.

6. Efficiency of Service (cost effectiveness)

4.1 Using the spreadsheet provided for all employees in your department, please distribute salaries of individuals across all services provided to reach an educated or reasonable estimate of the cost of providing the service.
52301
Attach your allocated spreadsheet here.

4.2 Using the spreadsheet provided, please distribute your department's annual operating expenses across all services provided to reach an educated or reasonable estimate of the cost of providing the service.
7047

4.3 Using the spreadsheet provided, please distribute the square footage of work space across all services provided to reach an educated or reasonable estimate of the use of this resource.
44
Attach your allocated spreadsheet here.

4.4 During the last three years, have you adopted any measures to improve the efficiency (cost effectiveness) of providing this service (e.g. reducing salary costs, operating expenses or use of space, or increased output without increasing cost. Etc.)?
Yes
If yes, please describe the measures in <120 words. If this is a new service introduced over the past three years, please indicate. If no, please explain.
More tailored mailings and events.

4.5 What idea(s) do you have for improving the efficiency (cost effectiveness) of this service within existing resources (e.g. restructuring, merging, outsourcing, ways to cut costs, technology, etc.)? Please describe those ideas in <120 words.
More deliberate partnering with University publications.

Link to Scoring Rubric

4.6 What idea(s) do you have for improving the efficiency (cost effectiveness) of the service if additional resources were provided. Please describe your idea(s) in <120 words.

More outreach and events in financial power centers such as San Francisco and Oakland.
Migrating donors from existing levels of support to higher levels.

Link to Scoring Rubric

4.7 Do you have any plan(s) to improve the efficiency (cost effectiveness) of this service in the next 1-2 years (e.g. reducing costs, increasing productivity, etc.)?

Yes

If yes, please specify whether these plan(s) involve reducing salary costs, operating expenses and/or use of space. Please describe your plan(s) in <120 words. If no, please explain.

Utilizing University Publications and University Public Affairs.

Link to Scoring Rubric

4.8 Please describe the estimated output for this service for fiscal year 2011-12, quantify if possible (e.g. volume, service tickets resolved, people serviced, appointments, etc.) in <120 words.

Planned Giving messaging in 1 University Publication.

7. Other

Link to Scoring Rubric

5.1 Are you aware of services similar to this one that are being provided by another department at CSU East Bay?

No

If yes, please provide a list of those departments. How are the services described here similar or different? Please describe in < 60 words.

Link to Scoring Rubric

5.2 Is there anything unique or distinctive about your service? Please describe what is unique or distinctive in <120 words.

Planned Giving deals with Wills, Gift Annuities and other methods of making a gift.

Link to Scoring Rubric

5.3 Are there any additional things about this service that you would like the task group to know? Please describe/explain in <250 words.

Charitable gift planning is the pinnacle of private support. Over 85% of all giving in the United States is by individuals and planned giving comprises about 25% of the total $s given to philanthropic causes in the country. Our efforts must be tweaked to maximize the migration of existing donors to the level of 'transformational' giving.