1. Support Services Report Template

Report Info
Name of the person completing this report: Ara Serjoie
Title of the person completing this report: Vice President for University Advancement
Service: Advancement
Division/College: University Advancement

3. Mandated Service

Link to Scoring Rubric

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

Federal Law: Accessibility Section 1056
Executive Order: EO 1056
Campus Policy: Emergency Notification Protocol
Any other: CSU Board of Trustees Resolutions

Provide a brief explanation, if necessary, in < 60 words.
1991 - CSU Board of Trustees resolution (RPG-09-91) hold presidents accountable for advancement work. Crisis communication are stipulated under Executive Order 1056 and University policy as described in the "Emergency Notification Protocol. In addition, federal law requires that all campus webpages are accessible (Section 508).

4. Importance of Service

Link to Scoring Rubric

Briefly describe the service in terms of its primary function(s) and purpose(s) using <120 words
University Advancement includes all fundraising activities, communications and marketing, alumni relations, and events. The work of this division centers around inspiring the joy of philanthropy in support of student success and program excellence at CSUEB. Furthermore, the division facilitates the seamless marketing of university programs and activities for a variety of purposes, one of which is recruitment.

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: 30%
Faculty: 15%
Administrators/staff: 15%
Colleges/Departments: 20%
Alumni: 15%
Community outside University: 5%
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></th>
<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>
<td></td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</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></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>In close partnership with other areas, including planning and enrollment management, as well as academic affairs, UA creates compelling recruitment materials. Also, availability of scholarships to encourage students to attend CSUEB.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>Mainly, creating communication materials to inform and educate the university community. Also, raising funds to support students, faculty, and programs.</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>Connecting with alumni in meaningful ways to encourage their involvement and support of the university. Using multiple strategies including publications, personalized letters, phone calls, one-on-one visits, etc.</td>
</tr>
</tbody>
</table>

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></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></td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>✓</td>
<td></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></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></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>Enrollment at CSUEB has been through too many ups and downs. An enduring enrollment strategy should have with it a solid marketing component that is missing at this time.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>Lack of private support would have impeded the university’s ability to create some facilities (VBT building), award scholarships, or create opportunities for students (travel, etc.)</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>Not having an engaged alumni base would be detrimental to the university in the long-term especially in light of the need for increased private support, but also due to the need for mentoring (career, etc.) for students.</td>
</tr>
</tbody>
</table>
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 Commitments</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reinforce academic quality through open-minded inquiry, innovative teaching,</td>
<td>Funded Research. Internships. Showcasing Success and Accomplishments.</td>
</tr>
<tr>
<td>engaged learning, and distinguished scholarship</td>
<td></td>
</tr>
<tr>
<td>Enhance our inclusive campus, responding to the backgrounds and interests of our</td>
<td>Celebrating Our Diversity in Publications and Stories. Displaying Role of</td>
</tr>
<tr>
<td>diverse community and promoting their academic, professional and personal development</td>
<td>CSUEB in Turning Trials into Triumphs.</td>
</tr>
<tr>
<td>Serve students first, by expanding access and enhancing each student’s educational</td>
<td>Scholarships. Fellowships.</td>
</tr>
<tr>
<td>experience and prospects for success as a graduate and life-long learner</td>
<td></td>
</tr>
<tr>
<td>Foster a vibrant community through enriched student services and student life that</td>
<td></td>
</tr>
<tr>
<td>support student engagement and learning</td>
<td></td>
</tr>
<tr>
<td>Contribute to a sustainable planet through our academic programs, university</td>
<td>Offering Private Support as a Means to Enhance Buildings or Create New</td>
</tr>
<tr>
<td>operations, and individual behavior</td>
<td>Facilities.</td>
</tr>
<tr>
<td>Continuously improve our efficiency, transparency, and accountability while</td>
<td>Collaboration with Media to Ensure Expertise at CSUEB are Called on for</td>
</tr>
<tr>
<td>practicing mutual respect, responsiveness, and collaboration across the University</td>
<td>News, Special Reports, etc.</td>
</tr>
<tr>
<td>Support the civic, cultural, and economic life of all communities in the regions we</td>
<td>Raising Funds for Athletic and Cultural Programs at CSUEB.</td>
</tr>
<tr>
<td>serve through partnerships that promote education and social responsibility</td>
<td></td>
</tr>
<tr>
<td>Demonstrate our continuing record of leadership and innovation in higher education,</td>
<td></td>
</tr>
<tr>
<td>focused on 21st century skills, including science, technology, engineering, and</td>
<td></td>
</tr>
<tr>
<td>mathematics (STEM)</td>
<td></td>
</tr>
</tbody>
</table>

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.

The need for services provided by University Advancement is going to grow as less state funding is allocated to the university while we mitigate increases in tuition and fees for the students. Furthermore, the facility and programmatic needs of the institution, especially in light of there being no designated dollars from the state, demand an increase in fundraising. Communications will become more focused and intense as we showcase students and faculty, enhance media partnerships, and expand our visibility.

5. Quality of Service

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.

The best practices are provided through a number of sources: CASE (council for advancement and support of education), NACUBO, VSE (voluntary support of education), and CSU data are helpful in comparing our efficacy to other institutions. The $s raised also allow us to ascertain our success, same with respect to # of donors, donor retention, whether we are moving donors to higher levels of giving, etc.

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.

Somewhat. There were recommendations by a consultant that were only partially implemented. This was partly, at least from what I have been told, due to lack of resources.

Link to Scoring Rubric

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.

While there can definitely be strategies to use existing resources to improve the work of the division, there are real possibilities in play if we are willing to invest in our advancement efforts.

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.

Create a best practices model that will have a multifaceted approach for the following: Improve our database. Heighten visibility in media. Increase magazine publication and reach. Add other communications tools such as mobile app. Redo website and ensure ongoing revisions to stay current. Hold more focused and deliberate events. Increase our fundraising potential and $s donated to the university. Grow # of donors and improve retention rates. IN FACT - a multi-year plan is being created for the division that will drive these efforts in a manner that will be sustainable and beneficial for the university both in the short-term and the long-run.

Link to Scoring Rubric

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

No

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

While we can gauge satisfaction by some data such as event participation, # of donors, $s raised, etc. I would not consider any of these to be true processes. There will however, be a deliberate strategy to engage our constituencies - both internal and external - for providing us with feedback and insights to continue to improve our service to them.

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.

Both fundraising and communications are areas that need significant improvement and investment of resources.

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?
No

If yes, please describe in <120 words. If no, please explain
Following a retreat held in mid-October 2013, we are in the process of finalizing the purpose statement and values for University Advancement.

Link to Scoring Rubric

3.8 Does your service have annual goals (targets) of achievement regarding the quality of the service provided?
No

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.

Link to Scoring Rubric

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.

There are $goals associated with fundraising that have been met intermittently over the years. The main challenge is that our fundraising does not mimic best practices and is not sustainable.

6. Efficiency of Service (cost effectiveness)

Link to Scoring Rubric

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.

269117

Attach your allocated spreadsheet here.

Link to Scoring Rubric

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.

31080

Link to Scoring Rubric

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.

330

Attach your allocated spreadsheet here.

Link to Scoring Rubric
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.

Unfortunately, yes. This resulted in a broken approach, cutting services, reducing staff, and eliminating vital functions. Furthermore, in addition to having a morale consequence, the 'cuts' meant that the division was not able to follow the consultant’s feedback for enhancing efforts to better align with best practices.

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.

N/A

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.

N/A

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.)?

No

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.

N/A

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.

$5.2 million raised in cash and pledges from about 1650 donors.

7. Other

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

For an institution like ours, university advancement is somewhat misunderstood and under-utilized. As our funding changes, and as our environmental factors take on a different form, we need to think about and work together in order to create a culture of philanthropy at, and toward, Cal State East Bay.

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.