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: Fundraising
- 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.

- 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. March 2005 - BOT resolves to adopt guiding principles for institutional advancement based on Ketchum Report. Campuses should 1) ensure that the advancement enterprise has sufficient resources to achieve goals, 2) establish/evaluate annual goals, 3) operate a well-rounded development program, and 4) nurture a culture of philanthropy.

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

- This report focuses on all fundraising conducted by University Advancement. The purpose of the staff within development is to build lasting relationships with individuals, foundations, and corporations in order to heighten their interest in CSUEB and garner their philanthropic support for our students and programs.

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: 50%
- Faculty: 25%
- Colleges/Departments: 25%
- 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>Impact Area</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>
</tbody>
</table>
After college (helping students establish meaningful lifework and be socially responsible contributors to society)

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

<table>
<thead>
<tr>
<th>Area</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>Mainly through scholarships that encourage students to attend CSUEB. Potential for this type of work is not being maximized at this time.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>Scholarships as well as programmatic funds, in addition to funds for faculty research and excellence, are the main focus of our efforts at this time.</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>Our potential could be tremendous and yet currently under-utilized.</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>Action</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>Area</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>At this time, very little.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>Significant. The vast majority of funds raised are directed toward activities that directly impact students and work by faculty.</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>At this time, very little.</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>SSC</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</td>
<td></td>
</tr>
<tr>
<td>Learning, and distinguished scholarship</td>
<td></td>
</tr>
<tr>
<td>-----------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Enhance our inclusive campus, responding to the backgrounds and interests of our diverse community and promoting their academic, professional and personal development</td>
<td></td>
</tr>
<tr>
<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>
<td></td>
</tr>
<tr>
<td>Foster a vibrant community through enriched student services and student life that support student engagement and learning</td>
<td></td>
</tr>
<tr>
<td>Contribute to a sustainable planet through our academic programs, university operations, and individual behavior</td>
<td></td>
</tr>
<tr>
<td>Continuously improve our efficiency, transparency, and accountability while practicing mutual respect, responsiveness, and collaboration across the University</td>
<td></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></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></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.

The needs at CSUEB in myriad areas including scholarships, program improvement, creating new facilities, remodeling existing facilities, and opportunities for growth, research, and student support services are all compelling reasons to consider how we can do so much outside of the construct of our traditional sources of funding (i.e. state funds and tuition). We need to create a compelling case, identify stakeholders with a vested interest, work on the best strategies to communicate the case, and cultivate meaningful relationships that will lead to lasting support for the university.

### 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.

Perhaps in some informal ways. We do not have a plan in place for methodical and deliberate cultivation and stewardship.

**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.

**N/A**

**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.

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.

Meaningful strategies that are based on best practices are being utilized to create a plan for effective cultivation, solicitation, and stewardship.

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.

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.

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

The staff is certainly cordial and interested in the well-being of our donors. There is room for growth in terms of utilizing best practices to engage individuals in supporting the university. Corporate and foundation relations has been highly effective in their efforts, but the time has come for the university to take a more proactive approach to solicit private grants.

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.

$'s raised. # of donors.
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.

544337

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.

19536

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.

498

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.)?

No

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.

The fundraising staffing model is not ideal and the division of time/duties has created confusion as well as dissatisfaction.

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.

Assignment of fundraising staff to each major area of the university.
Enhancing annual fund strategies: direct mail, phonathon, etc.
Growing the alumni relations program.
Heightening planned giving strategies.
Sustaining, and even growing, corporate/foundation efforts.

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.

Fundraising goals, commensurate to the proposed plan for the division, will speak to the successes of following the best practice models for higher education development.

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?

Yes

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

Some areas on campus, primarily in student affairs and academic affairs, seek sponsorships and/or private grants. Efforts to at least align this work, if not somewhat centralize them, would be in the best interest of the university.

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

Yes. This work, although not new for CSUEB, is not well understood by both internal and external constituents. Therefore, efforts to educate and inform about the needs, as well as strategies that mimic best practices, should be adopted as a way to heighten awareness and create a culture of philanthropy.

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.

A multifaceted and multi-year plan is being created for University Advancement that will address a long-term strategy for improving our fundraising efforts.