Strategic Task Force
Strategic Task Force **End of Year Progress Report (May 2014)**
Task Force Name: Development Infrastructure
Charge: Create and refine an infrastructure that is committed to strategic, integrated and coordinated campus efforts to increase overall revenue through fundraising, entrepreneurial activities, grants & contracts.
Committee Members: The Development Infrastructure Taskforce includes the following members: Michele Cesca (chair), Associate Vice President, Central Development; Denise Bell, Direct Office of Sponsored Programs; Bill Briggs; Dean, College of Communications; Paul Deland, Professor of Mathematics Emeritus, College of Natural Sciences and Mathematics; David Forgues, Chief of Operations, Office of VP for Student Affairs; Rommel Hidalgo, Associate Vice President for Information Technology; Harry Norman; Dean, University Extended Education, Russell Nelson; Student Representative; Greg Saks, Vice President for University Advancement; Paulina Tagle, Director for Office of Grants and Contracts; Sora Tanjasiri, Professor, Department of Health Science, College of Health and Human Development.
Meeting Dates: 11/4/13, 12/17/13, 1/9/14, 1/15/14, 1/28/14, 2/5/14, 2/18/14, 3/10/14, 3/11/14, 4/25/14 & 6/16/14

Summary of Work Performed:

- The Development Infrastructure in coordination with the Fundraising Task Force Developed Factors/Metrics for a Successful Philanthropic Campus Culture and Supporting Infrastructure. These factors and metrics were used to conduct an exercise that examined the "gaps" between where Cal State Fullerton is currently and what infrastructure needs to be developed in order to meet the factors/metrics to create a successful philanthropic culture.
- The process included the development of a "gap analysis" to be used to help meet the goals outlined in the strategic plan.
- The Infrastructure Factors/Metrics for Success include the following:

1. Enhance Titan Pride through articles in Titan Magazine, and other publications, that showcase successful alumni, athletics program accomplishments, award-winning faculty and academic programs, etc.
2. Process through which campus leadership prescribes key programs/initiatives on which fundraising will focus (large in scope)
3. Campus-wide activities should be hosted that educate members of the fundraising community about key programs at CSUF
4. Campus culture of fundraising
5. Provide incentives for faculty to collaborate with others to develop and execute ideas for research and/or programming that serve the campus and external communities in a novel or more effective way
6. Construct campus-wide support system that promotes and rewards fundraising endeavors; further explore accountability measures for deans, department chairs, DODs, academic and other leaders responsible for fundraising work.
7. Build an educational component into faculty, staff, and student orientations that build Titan

Pride and recognize the contributions of donors and volunteers.

8. Provide mechanisms by which development officers, faculty, administrative staff, deans, and other academic leaders participate strategically in the community (e.g. boards, planning councils, etc.).

9. Create a series of fundraising training workshops for development staff, deans, department chairs, center directors, faculty and staff.

10. Awareness: What is available and what is the faculty doing?

11. Build into campus-wide awards programs recognition for alumni, faculty, and staff who contribute at a given level.

12. Create robust Technology Transfer and Intellectual Property offices.

13. Enhance existing partnerships between University Advancement and the Office of Grants and Contracts so that public and private support can build on each other.

14. Simplify the grant-submission process for faculty.

15. Create a mechanism for continuous review of the grants and contracts process in order to promote alignment with the strategic plan.

16. Articulating our overall mission: How are we impactful in relation to fundraising?

17. How our university creates revenue from non-state monies – definition of EA activities

18. How do we build the research agenda: utilize faculty expertise, investment of time will yield success, create mentorships, create teams.

- The taskforce established three subcommittees to complete the work of the needs assessment. The subcommittees included members of the Taskforce and additional campus representatives involved in the work in the three areas. The following are the three needs assessment subcommittees and their respective members:

Grants and Contracts: Paul Deland, Professor of Mathematics Emeritus, College of Natural Sciences and Mathematics; Rommel Hidalgo, Associate Vice President for Information Technology; Paulina Tagle; Director, Office of Grants and Contract; Denise Bell; Director, Office of Sponsored Programs; Sora Tanjasiri; Professor in the Department of Health Science, College of Health and Human Development.

Fundraising: Michele Cesca (chair), Associate Vice President, Central Development; Denise Bell, Direct Office of Sponsored Programs; Bill Briggs; Dean, College of Communications; Paul Deland, Professor of Mathematics Emeritus, College of Natural Sciences and Mathematics; David Forgues, Chief of Operations, Office of VP for Student Affairs; Rommel Hidalgo, Associate Vice President for Information Technology; Harry Norman; Dean, University Extended Education, Russell Nelson; Student Representative; Greg Saks, Vice President for University Advancement; Paulina Tagle, Director for Office of Grants and Contracts; Sora Tanjasiri, Professor, Department of Health Science, College of Health and Human Development.

Entrepreneurial Activities: Harry Norman, Dean, University Extended Education; William Briggs, Dean, College of Communications, Rommel Hidalgo; Rommel Hidalgo, Associate Vice President for Information Technology; Denise Bell, Director, Office of Sponsored Programs; Paulina Tagle; Director, Office of Grants and Contracts; Priscilla Lopez; Director, Orange County/Inland Empire Regional Small Business Development Center; Kurt Borsting; Director, Titan Student Centers;

Willem Van der Pol; Director, Facilities Operations; David Forges; Chief of Operations, Office of VP for Student Affairs.

- Each subcommittee convened to discuss the aforementioned Factors/Metrics for Success in relation to their given area (Grants and Contracts, Fundraising and Entrepreneurial Activities). The subcommittee discussed the factors, operationalized the factors for their given area, and identified sources of information to be used in the needs assessment process.
- The approach for completing the needs assessment brought each subcommittee together to examine where we currently are against what the Development Infrastructure Taskforce and Development Plan Infrastructure jointly identified as Factors/Metrics for Success supporting infrastructure. The Factors/Metrics for success reflect university-wide goals that are both transformative for the campus and compelling to prospective donors.

Recommendations:
While the three areas (grants and contracts, fundraising and entrepreneurial activities) are distinct, common themes emerged that provide opportunities to strengthen the overall infrastructure. Below is a list of recommendations in each of the respective areas and also common areas.

1. Utilize the Biomedical/Biobehavioral Research Administration Development (BRAD) Research Gateway Project findings. The goal of BRAD is to support the development and strengthening of research infrastructure related to grants and contracts.
2. Further explore RTP, release time, mentoring and incentives to enhance the grants and contracts infrastructure. Examine best practices at college-level and expand university-wide.
3. Develop an institutional framework to support the alignment of campus areas involved in grants and contracts such as OGC, ORD, Office of Corporate and Foundation Relations in University Advancement and college-based efforts.
4. Develop a process for campus leadership to prescribe University-Wide fundraising goals and priorities to be conducted annually or in multi-year cycles.
5. Conduct campus-wide activities to educate members of the philanthropic community about key programs. College and Program Development plans should include these key programs and strategies to solicit gifts annually.
6. Promote a campus culture of fundraising through increased awareness, development trainings, and enhanced recognition efforts.
7. Develop and adopt a definition of "entrepreneurial activities" for the university. Conduct an assessment of best practices within the CSU, peer and other institutions to assist with developing a definition.
8. Develop a committee representing a cross-section of the campus involved in entrepreneurial activities to meet quarterly to share information and enhance collaboration to optimize opportunities.
9. Develop a clear process for the sharing of success through Strategic Communications and further enhance strategic messaging on key campus priorities.
10. Review the process for distribution of Indirect Costs (IDC). Determine if a uniform distribution policy can be created for campus.

Conclusions:

Cal State Fullerton has a strong foundation to support the goal of increasing revenue through fundraising, grants & contracts and entrepreneurial activities. The campus has a strong sense of community and is enthusiastic about working together to meet the goals as outlined in the strategic plan. Continued and increased communication between all areas of campus will result in the strengthening of activities in each of the areas of fundraising, grants & contracts and entrepreneurial activities.

Supporting Documents (Please Attach):
- Development Infrastructure Taskforce Needs Assessment Report
- Needs Assessment Worksheet (Fundraising, Grants & Contracts & Entrepreneurial Activities)
- Office of Research, Creative Activities and Technology Transfer – Powerpoint presentation from Shari McMahan to Grants & Contracts Sub-committee
- Cal State Fullerton Philanthropic Overview – Powerpoint presentation from Greg Saks to the Fundraising Sub-Committee