

**Strategic Task Force  
End of Year Progress Report (May 2014)**

Task Force Name: Development Plan Task Force

Charge: Craft a plan with goals and tactics for creating a campus atmosphere conducive to raising \$15 million or more annually by FY 17-18.

Committee Members: Theresa Davis (Chair), Joe Arnold, Jim Donovan, Paula Hudson, Shari McMahan, Dimitri Oprean, Joan Rubio, Greg Saks, and Joshua Yang

Meeting Dates: 10/29/13; 1/9/14; 1/21/14; 2/20/14; 3/6/14; 3/11/14; 3/20/14; 4/17/14; 4/25/14; 5/15/14; 5/29/14

Summary of Work Performed: The Task Force held 11 meetings during FY 13-14, with three of those being in joint session with the Development Infrastructure Task Force and the Communications/Marketing Task Force. In their first meeting, they reviewed the charge, considered key elements existing on a campus that has a robust philanthropic culture and described how those characteristics exist at CSUF. Over the course of ensuing meetings, the task force began to identify the kind of infrastructure needed to support a rich philanthropic culture and joined meetings with the Development Infrastructure Task Force to bring about greater clarity of the infrastructure and how the work of the two task forces would complement one another. In order to gain a sense of the existing culture of philanthropy on campus, the Development Plan Task force attended a presentation that provided a primer on fundraising outcomes at Cal State Fullerton (see attached) and conducted a campus survey, distributed 2/19/14, that would provide an inventory of the kinds of fundraising activities being conducted throughout all divisions (see attached). It was sent out a second time on 2/27/14, in hopes of collecting more student feedback. This was not a scientifically structured survey but was designed to collect a broad sample of philanthropic activity. The task force also received consultation from Doug Stewart of Marts & Lundy who provided a more global view of the characteristics of campuses that experience significant fundraising success (see presentation attached). They attended a session of the joint task forces (with Development Infrastructure and Communications/Marketing) to hear the outcomes of the marketing study conducted by the Communications/Marketing Task Force. The Development Task Force is refining a working draft of a Development Vision-Strategy Plan that will be submitted by June 30<sup>th</sup>.

Recommendations:

1. Campus leadership sets and articulates specific and finite fundraising goals in collaboration with academic and programmatic units.
2. Campus programs and research reflect the rich, creative energy of faculty, staff, and students engaged in the work through which Cal State Fullerton provides value.
3. Each member of the campus community understands their role as one who creates a quality Cal State Fullerton experience that inspires a spirit of philanthropy.
4. Faculty, staff and alumni nurture the professional aspirations of our most precious resource – our students – and from their first day on campus to their last, will instill in them what it means

to be a Titan and the expectation that they will give back.

5. The campus creates an equal and committed focus on both short-term fundraising goals that raise needed funding for given projects and also the long-term development goals that create long-term relationships.
6. Donor stewardship is viewed as a priority. Donors are thanked and recognized at every level, and major donors are engaged in creative, meaningful, and personalized ways to ensure they are champions of the university's mission and goals.
7. The campus values that everyone on campus has a role in fundraising. As such, ongoing and pervasive development-related training is provided that instructs students, faculty, and staff in how to communicate the global impact of Cal State Fullerton consistently and in a compelling manner.

#### Conclusions:

- In order for Cal State Fullerton to achieve its mission in the broadest most impactful way, financial resources are required beyond the scope of that provided by the State of California. Such success requires the partnership of private citizens, foundations and corporations giving of their time, talent and treasure at substantial levels. This transpires only through a depth of commitment that is cultivated and nurtured by the campus – at every level and throughout the institution - over time.
- Cal State Fullerton already has a long-standing foundation in developing strong relationships with the community and alumni and in seeking and receiving philanthropic support. However, the campus engagement in philanthropy must be more robust in order to accomplish our financial goals. A robust philanthropic culture inspires and compels others to support our cause and serve as eager champions of the Cal State Fullerton mission.
- A rich culture of philanthropy promotes in our students, alumni, faculty, staff and community a deep feeling of commitment to the success of Cal State Fullerton; an eager spirit to routinely learn about the impact of Cal State Fullerton on the global community and needs of the institution to continue providing that value; and a willingness to act on their commitment to Cal State Fullerton with personal contributions, serving as champions of the campus and inspiring others to do the same.
- An individual's deep personal commitment to supporting the mission and goals of Cal State Fullerton is developed through the value that the CSUF experience has either brought to them personally or that they have observed in the lives of others. This should resonate in the nurturing that our students experience throughout their time here on campus; in our support of the professional growth and aspirations of our alumni, faculty and staff; and in our donors and community partners as we collaborate with them in creating a more productive workforce and in making the world a better place.
- Our strongest supporters are those who understand the social and economic contributions of

Cal State Fullerton and are willing advocates of it. A robust philanthropic culture sets aside the time to engage our constituents at a level through which they thoroughly understand the Cal State Fullerton story because they have the opportunity to live it. They experience it through their ongoing personal engagement with the campus and through various written communications that they receive about the value added by the university. Students, faculty and staff create the good work of the campus, and receive frequent communications about the impact of their efforts. Alumni, donors and community partners are invited to participate in the life of the campus through various venues so that they can be co-creators with us of the CSUF vision.

- It is only after we have cultivated a lasting and positive bond between Cal State Fullerton and our various constituencies of students, alumni, faculty, staff and community that we can receive the full benefit of their support. Students, faculty and staff who feel nurtured toward personal and professional growth during their time on campus are more willing to give back. Alumni, who were nurtured students and are now receiving support through campus programs that promote their professional and social aspirations, are more willing to serve as mentors, volunteers and donors. Members of the philanthropic community with whom we have shared our goals and invited them to be collaborators in the vision will feel a commitment to providing financial support to what they have helped to co-create for the betterment of society.
- Through thoughtful and well-paced engagement - integrated throughout the entire CSUF experience - the campus can nurture a deeply meaningful relationship with constituents that garner a high-level of support.

Supporting Documents (Please Attach):

1. Meeting Agendas (October, 2013 through May, 2014)
2. Presentation - Primer on fundraising outcomes at CSUF (UAC Presentation)
3. Survey (Inventory of Philanthropic Activity and summary of open-ended responses)
4. Presentation – consultation of Doug Stewart from Marts & Lundy (Development Plan Thoughts and Considerations)