

A close-up photograph of a young woman, a graduate, smiling broadly. She is wearing a black graduation cap with a gold tassel and a white hijab. Her gown is black with a white patterned stole. A colorful tassel (orange, blue, and purple) is draped around her neck. The background is a bright, out-of-focus outdoor setting.

**CSU**

The California  
State University

# POWERING STUDENT SUCCESS: Transforming Tomorrow

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2018–2019 Donor Support | The California State University

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## DEAR FRIENDS –

On behalf of the entire California State University community, I offer my deepest thanks and heartfelt appreciation to the forward-thinking donors whose leadership and generosity have propelled us to a record year of philanthropic success.

These champions of higher education recognize the life-changing opportunities provided by a CSU degree, and they share our commitment to ensuring that these opportunities are available to students from all walks of life. Our donors are confident that their support is a worthy, valued and consequential investment in the future of California and the betterment of the world we live in.

This unprecedented level of generosity will fuel the CSU's larger strategic effort of Graduation Initiative 2025, which continues to show impressive results as demonstrated by improved success measures for *all* students. It will provide students with financial support and power innovative academic programs and groundbreaking research in areas as rich and dynamically diverse as California itself.

The stories that follow are a tribute and testament to our donors' remarkable commitment to the CSU mission, and they powerfully presage the consequential and lasting impact these gifts will provide.

Thank you again to our generous and dedicated donors. Your support will continue to provide opportunities for all students, regardless of background and circumstance. And your leadership will inspire others and help shape the future prosperity of our great state.

For California,



Timothy P. White, Chancellor





**OVERVIEW**

Substantial philanthropic support resulted in a consequential and record-breaking year for the California State University.

In 2018–19, the CSU received almost \$570 million in gift commitments and more than \$370 million in gift receipts, with both figures surpassing previous all-time highs. Such record-setting support testifies to the confidence that donors have in the power of the CSU to propel the state of California forward and create positive change in our communities.

A number of remarkable gains contributed to this success, as campus communities rallied to provide exceptional support.

Cal State East Bay received more than \$7 million in philanthropic investments, marking its third-highest fundraising year to date. This support will empower programs that provide expanded student participation in experiential learning and research.

CSU Bakersfield celebrated an exceptional year as southern San Joaquin Valley donors demonstrated their commitment to the campus by contributing more than \$7.4 million to support Roadrunner athletes, first-generation students and science and technology programs that prepare local youth for meaningful careers.

San Francisco State demonstrated the power of "bold thinking" as the campus secured major gifts in support of its comprehensive campaign. Two \$25 million gifts, one of which is the largest gift of cryptocurrency to a university, will support excellence in the liberal arts and innovation in business education.

Such phenomenal support speaks to the confidence that our champions have in the California State University to provide equitable and transformative education. We are forever grateful for their dedication and generosity.

**GIFTS RECEIVED**

Record generosity resulted in over \$370 million in gifts received for 2018-19. Of that total, less than 2 percent, or \$7 million, was unrestricted.

Donor-designated support for current operations of \$237 million included:

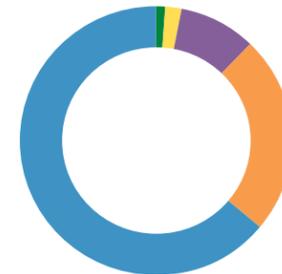
- \$88 million for faculty support and academic enrichment
- \$53 million for public service programs
- \$33 million for student scholarships
- \$16 million for athletics
- \$5 million for equipment and facility improvements
- \$42 million for additional university priorities

For long-term capital projects, campuses received \$35 million for major facility construction and renovation.

Endowments grew by \$87 million in new contributions, which will provide support in perpetuity. More than half of endowment gifts are designated to scholarships.

Donors committed an additional \$4.8 million in irrevocable deferred gifts.

**GIFT RECEIPTS BY PURPOSE**



- Current Operations **64%**
- Endowments **24%**
- Capital Projects **9%**
- Unrestricted **2%**
- Deferred **1%**

**GIFT RECEIPTS BY SOURCE**



- Other Individuals **24%**
- Alumni **17%**
- Parents **2%**
- Foundations **31%**
- Corporations **17%**
- Other Organizations **9%**

**\$60 MILLION**  
ENDOWMENT DISTRIBUTION

**ENDOWMENT MARKET VALUE**



**4.52%**  
AVERAGE ENDOWMENT INVESTMENT RETURN

# GIVING THAT POWERS STUDENT SUCCESS



# ACADEMIC ENRICHMENT

Providing depth and perspective to student learning beyond the classroom, donor support enriches the academic experience across the CSU, affording students hands-on opportunities to conduct research, gain professional knowledge and expand their education.

All segments of California's economy—technology, agriculture, aerospace, healthcare, hospitality, entertainment, the arts and more—benefit from the knowledge, agility, innovation and experience that our diverse alumni bring to their chosen fields.



## **\$1 MILLION PLEDGE FROM RUIZ FOOD PRODUCTS WILL HELP FINANCE EXECUTIVE-STYLE CLASSROOMS**

Kim Ruiz Beck, chair of Ruiz Foods Products, is a first-generation college graduate and alumna of the Fresno State Craig School of Business. Under her leadership, Ruiz Foods pledged \$1 million to finance two state-of-the-art classrooms for the school's executive MBA and accelerated bachelor's programs. An annex to the University Business Center, the Ruiz Foods Executive Classrooms will feature innovative technology to offer transformative educational experiences for the state's future business leaders.



*Ronald H. Silverman Fine Arts Gallery*

## **NAMING OF RONALD H. SILVERMAN FINE ARTS GALLERY HONORS DISTINGUISHED ALUMNUS AND PROFESSOR**

California State University, Los Angeles recognized a generous gift from two alumni by naming the Ronald H. Silverman Fine Arts Gallery in honor of their father, a distinguished alumnus and professor.

Dr. Silverman spent more than three decades sharing his passion for art with students and established an endowed scholarship fund to support art education. His son Jeffrey Silverman and daughter-in-law Amelia Perez-Silverman are both longtime supporters of the university.

## **DONATION SUPPORTS CONSTRUCTION OF EXPRESSIVE TECHNOLOGY STUDIOS**

A \$2 million gift from Jack and Felicia Cashin will help establish a state-of-the-art workspace for students in the Liberal Arts and Engineering Studies Program at California Polytechnic State University, San Luis Obispo. Dedicated to fostering collaborations at the intersection of technology, the humanities and the arts, the Expressive Technology Studios will create an interdisciplinary space that educates and empowers students according to the university's renowned "learn by doing" philosophy.



*The Carolyn Campagna Kleefeld Contemporary Art Museum*

**ENDOWMENT AND DONATIONS ILLUMINATE CSULB ART STUDIES**

Acclaimed poet, author and visual artist Carolyn Campagna Kleefeld made a cash gift and donated 170 of her inspirational paintings and drawings to the university art museum at California State University, Long Beach, which was renamed in her honor. Kleefeld’s philanthropy will help fund the museum’s expansion as well as endow scholarships, a multidisciplinary lecture series and cutting-edge museum programming.



*San Diego State study abroad students in Brazil*

**SAN DIEGO STATE UNIVERSITY ALUMNI ADD TO THEIR ENDOWMENT IN SUPPORT OF STUDY ABOARD PROGRAMS**

The interdisciplinary J. Keith Behner and Catherine M. Stiefel Program, created in 2014 and housed in the College of Arts and Letters, is San Diego State University’s first endowed academic program with an international focus. Now, a second gift to the program from alumni Behner (’71) and Stiefel (’92) will increase its impact, not only at SDSU but also in Brazil and within the Brazilian diaspora living in the United States.

SDSU President Adela de la Torre expressed the university’s incredible gratitude for the continued support of donors such as Behner and Stiefel. “This program will give our students increased opportunities to study abroad and to research issues that affect urban and rural communities, including social, environmental and economic topics,” she said.



**DODGE FAMILY SUPPORTS CPP ARCHITECTURE PROGRAM WITH RETAINED-LIFE ESTATE GIFT**

With a retained-life estate gift, Steve and Marian Dodge ensured their home’s preservation as a historic example of midcentury modern architecture to provide a remarkable learning experience for future students at California State Polytechnic University, Pomona. Considered one of architect Raphael Soriano’s finest midcentury modern designs, the Schrage House in Los Feliz will someday serve as a learning lab for the Cal Poly Pomona College of Environmental Design. Soriano, a CPP faculty member, was renowned for his pioneering style that incorporated modular prefabricated steel, glass and resin-bonded plywood and emphasized integrating his designs with their environments.



**GRANT SUPPORTS CAL STATE LA TELEVISION, FILM AND MEDIA STUDIES**

The Department of Television, Film and Media Studies at California State University, Los Angeles received a \$1 million grant from noted international modern and contemporary art gallery Hauser & Wirth to fund equipment and software purchases, student mentorship and employment, and faculty support and development over the next five years. Funding will also support updated foundational course content.

**ST. JOSEPH HEALTH GRANT ADDRESSES NORTH COAST NURSING SHORTAGE**

Investing in the future of health care on the North Coast, St. Joseph Health, Humboldt County provided a \$2 million grant to restart the Humboldt State University Registered Nurse to Bachelor of Science in Nursing program. Tailored to the region’s needs, the curriculum will prepare nurse leaders who understand health disparities, rural issues and cultural humility, while advocating for the physical and psychosocial health of North Coast communities.



**WINE AND VITICULTURE CENTER CO-NAMED IN HONOR OF GENEROUS SUPPORTERS**

The naming of the JUSTIN and J. LOHR Center for Wine and Viticulture recognizes the philanthropic support of two vital supporters of California Polytechnic State University, San Luis Obispo.

The Resnick Foundation, founded by Lynda and Stewart Resnick of JUSTIN Vineyards & Winery, pledged \$2.5 million to the facilities, while Jerry Lohr of J. Lohr Vineyards donated \$1 million and pledged \$1.5 million to the project.

Cal Poly San Luis Obispo’s Wine and Viticulture program, the largest of its kind in the U.S., provides a comprehensive education that focuses on the three major elements of the wine industry: viticulture, enology and wine business.

**“We’re hopeful that with programs like the distributed learning programs and the Superior Region endowment in place, the tremendous demand for professional social workers in the North State will be met.”**

*— Seema Sehrawat,  
Professor, Social Work,  
Chico State*



**ENDOWMENTS HELP MEET DEMAND FOR SOCIAL WORKERS IN STATE'S NORTHERNMOST REGION**

Endowments from the Superior Region Mental Health Workforce Education and Training Partnership will ensure that both California State University, Chico and Humboldt State University continue to offer bachelor's and master's degrees in social work through their distributed learning programs.

The \$850,000 gift to Chico State and the \$250,000 gift to Humboldt State will sustain accessible education in perpetuity to meet the increasing demand for a robust behavioral health workforce in the 16-county Superior Region, which reaches from Lake County to the Oregon border.

**ANONYMOUS DONOR GIFTS \$1.6 MILLION TO SJSU COMPUTER SCIENCE DEPARTMENT**

A planned gift will endow a lectureship in the San José State University computer science department and establish a teaching position upon the anonymous donor's death.

“San José State is full of local students. They have a lot they can contribute and they just need a little guidance,” the donor said. “While there are many great ways to help students accomplish their educational goals, this gift helps to get more great faculty to help students prepare for the many local opportunities for computer science majors.”

# STUDENT ACHIEVEMENT

The California State University is the most ethnically and economically diverse university in the nation at a time when a college degree has never been more necessary for a secure and prosperous future. As part of Graduation Initiative 2025, the CSU is committed to providing equity of opportunity to all students, regardless of income, background, gender, race, ethnicity or status.

As critical strategic partners, donors are key to the CSU's success in increasing academic achievement and degree completion for all students, while closing equity gaps for those from historically underserved communities. Donor support continues to positively impact learning by addressing student well-being and fostering a strong sense of belonging and academic purpose.



## \$50 MILLION PLANNED GIFT TO SUPPORT STUDENT SUCCESS AT CAL POLY SAN LUIS OBISPO

An anonymous donor has committed a \$50 million planned gift to California Polytechnic State University, San Luis Obispo in general support of student success. The funds were received during Cal Poly San Luis Obispo's Power of Doing comprehensive fundraising campaign, which has a goal of raising \$700 million by 2021 to empower students, excellence and innovation.



*Students from Chico State receive professional attire*

## DONORS SUPPORT CHICO STATE PROFESSIONAL ATTIRE FUND

A \$100,000 gift from Chico State alumna Marti Easton Sutton and her husband, John, will help students in the College of Business obtain appropriate clothing for job interviews and office work. The Professional Attire Fund grants students in need up to \$500 to buy business wear to help jump-start their careers.

## FORMER U.S. SECOND LADY TIPPER GORE ENDOWS PEER MENTOR PROGRAM

The Tipper Gore Award for Excellence in Peer Mentorship will provide \$3,500 a semester for selected California State University Channel Islands peer mentor ambassadors to continue to mentor while taking on additional responsibilities advocating for the program. As a supporter of education and an advocate for mental health awareness, former second lady Tipper Gore became a founding donor of the program to help peer mentors provide students with academic, emotional and practical support in what can be an unfamiliar environment.



**AMAZON AWARDS CSUN ALEXA INNOVATION FELLOWSHIP TO BOOST ENTREPRENEURSHIP**

Student entrepreneurs in the David Nazarian College of Business and Economics will soon be using Alexa devices to power their ideas through California State University, Northridge’s participation in the inaugural Amazon Alexa Innovation Fellowship program. The fellowship aims to help support on-campus entrepreneurial programs through funding, Alexa devices, hardware kits and regular training. The resources will be used for student scholarship and to further support innovation programs, operating costs and sponsorships of student ventures.

**GIFT FROM FORMER DIRECTOR PROVIDES GRANTS FOR LGBTQ-IDENTIFYING STUDENTS**

Bob Ericksen worked at California State University, Fullerton for 23 years and served until 2006 as the director of the Office of International Education and Exchange—now Extension and International Programs. Visiting the campus in 2018, he was inspired to launch the Ericksen LGBTQ Grant Program, which provides financial assistance to LGBTQ-identifying students who have been affected by an emergency, crisis, catastrophic event or personal hardship. Support may include basic living expenses, such as for housing, transportation or academic funding due to loss of familial support.

**SONOMA STATE RECEIVES \$2.2 MILLION TO SUPPORT EOP**

Sonoma State University received more than \$2.2 million in donations for its Educational Opportunity Program (EOP). The money came from Mill Valley’s Kalmanovitz Charitable Foundation, Healdsburg’s Rodney Strong Vineyards, Napa wine barrel supplier Cooperages 1912 and the Federated Indians of Graton Rancheria, which owns the Graton Resort and Casino in Rohnert Park. The donations will allow EOP to provide scholarships and other support to hundreds of economically disadvantaged students, who often are the first in their families to go to college.

**CSUSB RECEIVES \$960,000 GRANT TO INCREASE NATIVE AMERICAN ENROLLMENT**

The San Manuel Band of Mission Indians has awarded a three-year \$960,000 grant to California State University, San Bernardino to increase Native American enrollment and student success. As part of the Native American Enrollment and Achievement Initiative, CSUSB will hire a director of tribal relations to oversee the program. The grant will sponsor two enrollment and outreach coordinators, three student mentors, an academic scholarship and a Summer Bridge Program geared toward the Native American student population.

**“This remarkable grant strengthens our relationship with tribal communities, creating partnerships to encourage and grow Native American enrollment, not only at CSUSB, but across California.”**

*– Tomás Morales,  
President,  
Cal State San Bernardino*



# TRUSTEES' AWARD

The Trustee Scholars represent the hopeful, hard-working and resilient spirit that defines California. Nominated by their campus president, each of these students has a superior academic record and serves their community in extraordinary ways. Each has also faced and overcome great obstacles to pursue their dreams through higher education.

The CSU Trustees' Award for Outstanding Achievement is the university's most prestigious scholarship. Thanks to donor generosity, 23 students received an award this year, ranging from \$6,000 to \$15,000.

San Francisco State student Cheng Yu achieved top honors and was recognized as the 2019 Trustee Emeritus Ali C. Razi Scholar. After emigrating from China, where he suffered discrimination for being deaf and gay, Cheng relocated to the U.S. and graduated from the University of Oregon with a bachelor's in psychology. A first-generation college student, he is currently a graduate student in social psychology at San Francisco State, where he maintains a 4.0 GPA. Cheng dreams of becoming a university professor to conduct research and share knowledge about gender discrimination and racial diversity.



*"My mother insisted on buying me a new book every time I finished one, even when we didn't have enough money for rent."*

— Cheng Yu,  
2019 Razi Scholar

2019 AWARDEES: Denisse Silva, Tanay Pattani, Cory Tondreau, Juan Venegas, Hickry Nguyen, Jennifer Phan, Amy Tram Vu, Lauren Werner, Dale Lendrum, Isidro Sesmas II, Samuel Rodriguez, Selena Velasquez, Kenneth Perry Hooks Jr., Laura Patricia Diaz, Emeseb Tabor, Roberta Fox, Tyler Perez, Cheng Yu, Simran Bhalla, Nathaniel Morgan, Jeff Jaureguy, Anthony Daniel Tercero and Angel Avalos

# FACULTY SUCCESS

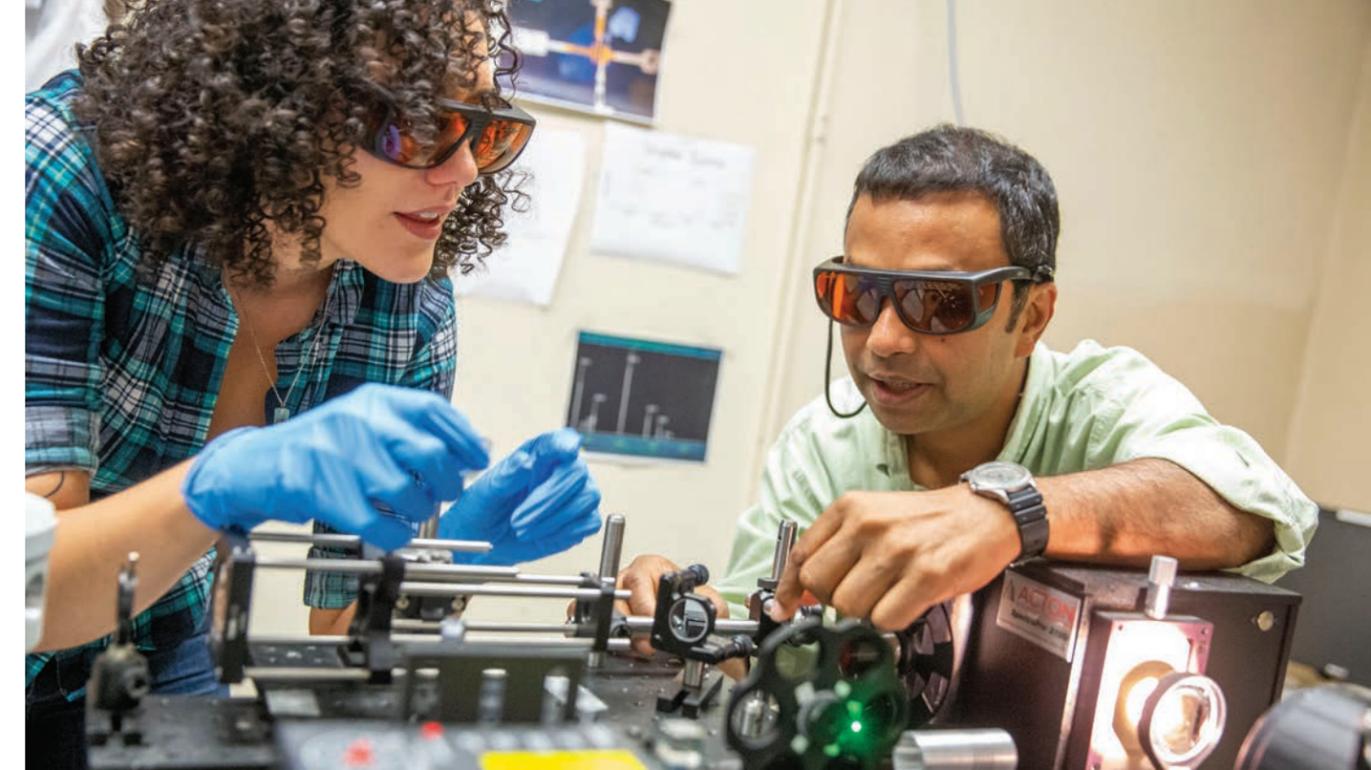
Recognizing the positive influence and lasting contributions that California State University faculty leaders provide, donor support for faculty excellence ensures the continuing success of innovative research, scholarship and academic achievement across the CSU.

Generous contributions from donors—many of them faculty and former students—provide endowments to promote experiential learning and expand student opportunity. Their passionate support guarantees CSU faculty leaders will continue to deliver inclusive instruction, guidance and inspiration.



## HAUTH FAMILY ENDOWS CHAIR FOR COMMUNICATION SKILLS CENTER

California State University, Long Beach emeritus professor Luster E. Hauth and his wife Audrey Nichol recently donated \$1 million to endow a chair at the center that bears their name, marking the third time the Hauths have given \$1 million to the university. Their initial gift in 1998 established the Luster E. and Audrey Nichol Hauth Center for Communication Skills, and their second donation enabled the center to expand and offer additional services to help students, faculty and community residents and organizations enhance their personal communication skills via speaking, leadership and conversational techniques.



## USS MIDWAY FOUNDATION ENDOWS MODERN MILITARY HISTORY CHAIR

A \$3 million pledge from the USS Midway Foundation will endow a modern U.S. military history chair at San Diego State University. The USS Midway Chair in Military History will advance research, teaching and public engagement on historical events from the 1940s to the present and help shape a new interdisciplinary program at SDSU's Center for Military History. The greater San Diego area is home to one of the largest active duty military and veteran communities in the world.

## \$25 MILLION CRYPTOCURRENCY GIFT CREATES LAM-LARSEN FUND FOR GLOBAL INNOVATION

A \$25 million gift from San Francisco State University alumnus Chris Larsen, his wife, Lyna Lam, and the Rippleworks foundation will support students learning about—and becoming changemakers of—local and global entrepreneurial and fintech ecosystems. Believed to be the largest gift to a university to date in cryptocurrency, the donation will support the Lam-Larsen Fund for Global Innovation and two endowed chairs: one in financial technology and the other in entrepreneurship.

**“We are extremely grateful for the Marcuses’ generosity and ongoing service and commitment to San Francisco State University. Their steadfast support has had a profound impact on our students, faculty, staff and programs, and this history-making gift will carry that legacy far into the future.”**

*— Leslie Wong,  
Former President,  
San Francisco State*



**SFSU COLLEGE OF LIBERAL & CREATIVE ARTS RECEIVES \$25 MILLION GIFT FROM GEORGE AND JUDY MARCUS**

Students in the San Francisco State University College of Liberal & Creative Arts will benefit from a \$25 million gift from alumni and key benefactors George and Judy Marcus supporting student and faculty research. The George and Judy Marcus Funds for Excellence in the Liberal Arts will endow two new faculty chairs in the college’s Creative Writing Department and two in the School of Cinema. The funds will also support renewed facilities and scholarship in the college through the George and Judy Marcus Awards for Faculty and Student Research.

# WANG AWARD

The Wang Family Excellence Award recognizes four outstanding faculty members and one outstanding administrator from across the CSU. The five award recipients, through

extraordinary commitment and dedication, have distinguished themselves by exemplary contributions and achievements. Each recipient is given a \$20,000 award.

## THE 2019 WANG FAMILY EXCELLENCE AWARD RECIPIENTS ARE:

### **Stephen Mezyk, Ph.D.**

Outstanding Faculty Innovator in Student Success, Cal State Long Beach

### **Guadalupe X. Ayala, Ph.D.**

Outstanding Faculty Scholarship, San Diego State

### **Lori Beth Way, Ph.D.**

Outstanding Staff Performance, San Francisco State

### **Julia E. Curry Rodríguez, Ph.D.**

Outstanding Faculty Service, San José State

### **Thomas Fowler IV**

Outstanding Faculty Teaching, Cal Poly San Luis Obispo

The annual awards have been endowed by a generous gift from Trustee Emeritus Stanley Wang. Trustee Emeritus Wang is a champion of higher education and believes in the importance of recognizing outstanding contributions by faculty and staff that advance student success.



*"The combined contributions of this year's Wang Family Excellence Award recipients are reshaping the university and global learning community."*

— Chancellor Timothy P. White

# FACULTY INNOVATION & LEADERSHIP AWARDS

With generous support from the College Futures Foundation, the Faculty Innovation and Leadership Award recognizes faculty who are implementing innovative practices that significantly improve learning and course outcomes. The award also acknowledges faculty who have demonstrated leadership at the department, college or university level to improve student success and outcomes in courses with traditionally low success rates or persistent equity gaps.

As part of the recognition, awardees received a \$5,000 cash award with \$10,000 allocated to their academic department to support ongoing innovation and leadership to advance student success.

The College Futures Foundation aims to foster student-centered practices that support equitable student outcomes.

*"These exceptional recipients demonstrate leadership in their respective fields and incorporate cutting-edge techniques into curricula. Their commitment to student success ensures that the value of a CSU degree continues to increase."*

— Chancellor Timothy P. White



**FACULTY INNOVATION & LEADERSHIP AWARD WINNERS:** Mary Adler, Steve Alas, Kim Berry, Adam Burke, Allison Evans, Bonnie Gasior, Nelson Graff, Sara Johnson, Ghazan Khan, Tina Korani, James LoCascio, Youwen Ouyang, Katy Pinto, Sonja Pruitt-Lord, Alfred Schademan, Maxwell Schnurer, Montgomery Van Wart, Vang Vang and Walter Zelman

# STUDENT SCHOLARSHIPS

Donor support for student scholarships provides a remarkable return on investment, empowering thousands of students across the state to achieve their academic goals and build a better future for themselves, their families and California.

Of the California State University's more than 481,200 students, about 80 percent receive some type of financial aid. Student scholarships, combined with federal and state financial aid, help ensure that economic status isn't a barrier to student access and achievement.



## CSU RECEIVES \$3.1 MILLION SCHOLARSHIPS GRANT FOR NEW TEACHERS

A \$3.1 million grant from the S. D. Bechtel Jr. Foundation will help the California State University prepare new K-12 teachers. The CSU Residency Year Service Scholarship Program will offer \$10,000 service scholarships to over 300 dedicated teacher candidates, augmenting other sources of financial aid. The scholarships will support candidates in residency programs that allow apprentices to teach alongside an expert mentor, receive constructive feedback of in-class instruction and interact with students.



## ENDOWED SCHOLARSHIP SUPPORTS CSUDH SPANISH MAJORS

A \$100,000 endowment honors a professor for her 40-year career as one of the first faculty members in the California State University, Dominguez Hills modern languages department. The Frances Lauerhass Endowed Scholarship will provide financial assistance to one distinguished CSUDH student annually who is majoring in Spanish. "Frances had very strong feelings about Cal State Dominguez Hills," said her husband, Ludwig "Larry" Lauerhass Jr., "One of her lifelong goals was helping students, so I did this in her memory. I know it would have made her very happy."

## CSUF UNIVERSITY HALL RENAMED TO HONOR MILTON A. GORDON

The California State University Board of Trustees renamed University Hall at California State University, Fullerton as the Milton A. Gordon Hall in recognition of the 21-year legacy of service by the university's fifth president. To honor her late husband, Margaret Faulwell Gordon donated two residential properties in Northern California to Cal State Fullerton's Philanthropic Foundation. The proceeds of the gift, as well as the couple's cumulative giving over the years, will support the President Milton A. Gordon and Dr. Margaret F. Gordon Endowed Scholarship.



### JURAN FAMILY PAYS IT FORWARD FOR CSUMB STUDENTS

Debbie Juran, a California State University, Monterey Bay Foundation Board member and adoptive mother of two CSU Monterey Bay alumnae, recently established a planned gift for CSUMB's College of Education, to predominantly benefit low income and first-generation students. "I respect what [College of Education] Dean Jose Luis Alvarado is doing very much," Juran said. "He told me most first-generation students don't have money for study materials. I can relate to that. Given that I could impact that situation, we created a broader platform for a legacy gift to the College of Education."



### CSUEB ALUMNA CREATES SCHOLARSHIP FOR PEACE AND UNDERSTANDING

By turning her required IRA distribution into a gift and including a planned bequest, California State University, East Bay alumna Carol Sughrue established a scholarship at her alma mater to support first-generation students who have committed to working with refugee and immigrant populations or promoting international peace. The initial Carol Sughrue Scholarship for International Peace and Understanding of \$25,000 received more than 130 applications. To support more students, the amount was split into four scholarships, each of which will cover nearly all of a year's tuition.



### FRESNO STATE ALUMNUS DEREK CARR AND WIFE ESTABLISH SCHOLARSHIP

A \$93,000 gift from Oakland Raiders quarterback Derek Carr and his wife, Heather, funded a full-ride scholarship for one student renewable for four consecutive academic years at California State University, Fresno. The Derek and Heather Carr Scholarship was established to support an entering Bulldog freshman who graduated from a four-year high school in the Central Valley, demonstrated positive impact and community leadership, and exemplified the Fresno State "be bold" spirit.



### MATADOR ALUMNUS CREATES SCHOLARSHIP FOR CSUN ENGINEERING STUDENTS

Autodesk president and CEO and Matador alumnus Andrew Anagnost honored his mother with a \$300,000 gift to California State University, Northridge to establish the Teresa Sendra-Anagnost Memorial Scholarship Endowment. The scholarship will support high-achieving students pursuing degrees in the university's College of Engineering and Computer Science, providing up to 100 percent of the total cost of attendance after other aid. Sendra-Anagnost was an early pioneer in the establishment of nurse practitioner as a professional designation and helped support her three children through their studies at CSUN.

### EMERITUS PROFESSOR ENDOWS CSUDH PSYCHOLOGY SCHOLARSHIP

For Emeritus Professor of Psychology Beverly Palmer, forming lasting bonds with her students was one of the most rewarding aspects of working at CSUDH. With that in mind, Palmer and her husband, Richard, created the Beverly B. Palmer, Ph.D., Endowed Scholarship in Psychology with a \$50,000 gift to CSUDH. The scholarship will pay tuition and college fees for one full-time undergraduate student annually in the Department of Psychology.



### FIRST-YEAR CSUF STUDENTS RECEIVE ASSISTANCE FROM ABREGO SCHOLARSHIP

The Abrego Future Scholars Program provides financial and academic support to California State University, Fullerton students during their first year of studies, awarding up to fifty \$1,500 scholarships to first-time freshmen and first-time transfer students. It also helps students who have been disadvantaged due to their economic, environmental or educational backgrounds transition into college. This year, a golf tournament raised \$100,000 for the program.

**“The Aspiring Teacher Scholarship helped my sister and me move in together, focus more in school, spend more time together and just overall give us that peace of mind.”**

*— Cindy Salazar,  
Aspiring Teacher Scholar,  
Fresno State*



#### **GIFT BOOSTS SACRAMENTO STATE NATIVE AMERICAN STUDIES SCHOLARSHIPS**

A \$750,000 gift from the Yocha Dehe Wintun Nation will fund hundreds of scholarships in Sacramento State’s Native American Studies program. The Native American Studies Yocha Dehe Wintun Nation Scholarships are available to all undergraduate and graduate students, regardless of major. One of the requirements is that students must have completed a Native American Studies course during the year. The gift will allow the Native American Studies program to offer \$2,000 scholarships to individual recipients each semester, double the \$1,000 that recipients could previously receive.

#### **SCHOLARSHIP PROGRAM ADDRESSES NEED FOR BILINGUAL TEACHERS**

An anonymous donor funded a scholarship program for students pursuing bilingual teaching credentials at California State University, Bakersfield and California State University, Fresno. The Aspiring Teacher Scholarship will support students enrolled in post-baccalaureate teacher education programs who are interested in working with English language learners and bilingual students. The program has awarded \$1 million in scholarships to help address the shortfall of bilingual teachers in the Central Valley.

# DIRECTED RESEARCH

Directed research is a high-impact practice that challenges California State University students to attain top levels of academic achievement as they develop and test hypotheses, participate in cutting-edge research and engage with course content.

Pairing undergraduates with faculty scholars allows them to work on meaningful, rigorous and innovative research projects, while developing critical skills and promoting meaningful career choices to effectively support the state's economy and its future.

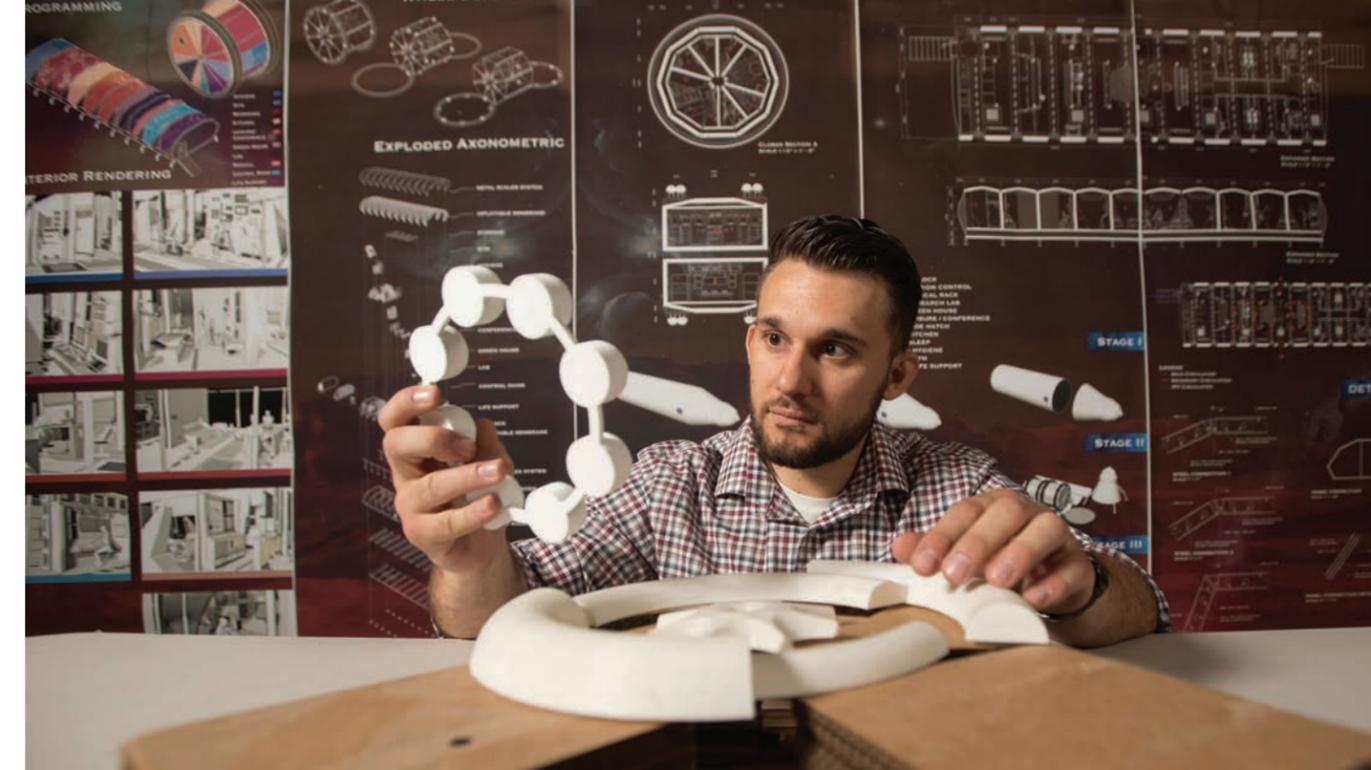
## CSUSM'S MOST GENEROUS DONOR GIFTS \$2.6 MILLION TO THE CSU CENTER FOR PALLIATIVE CARE

The naming of the Shiley CSU Institute for Palliative Care recognizes the generous support of Darlene Marcos Shiley. The prominent philanthropist announced that she had donated an additional \$2.6 million to the institute in June, during California State University San Marcos' annual fundraising gala. This latest donation brings Shiley's total gifts to the CSUSM Foundation to \$6 million, making her the most generous donor in the university's history, with the majority of her donations going to the institute.

Palliative care addresses each patient as a whole person, including his or her physical comfort, confidence, emotional well-being, spirituality and dignity.

Shiley became interested in palliative care as she cared for her husband, renowned artificial heart valve inventor Donald Shiley, before he died of a difficult illness in 2010.

"To have watched my late husband Donald decline over four years was truly devastating," she said. "But we both personally experienced the benefits of palliative care during the period, and as I quickly learned, palliative care isn't just for those who are afflicted. It's also for the loved ones and caregivers of people dealing with serious or chronic illness."



## PROGRAM PROVIDES SCHOLARSHIPS FOR STUDENT RESEARCH AT CSUB

The President's Associates program at California State University, Bakersfield raised more than \$150,000 to double the number of research scholarships over the previous year. As part of the Student Research Scholars Program, the donations will ensure that 50 students receive financial support to conduct in-depth research projects in a wide range of scientific disciplines.

## GIFT FROM LOCKHEED MARTIN SUPPORTS UAV TECHNOLOGY PROGRAM

Lockheed Martin recently donated \$150,000 to the College of Engineering at California State Polytechnic University, Pomona to support the college's unmanned aerial vehicle (UAV) energy technology program. For more than four decades, Lockheed Martin has provided leadership gifts totaling over \$1.3 million in support to College of Engineering initiatives, including scholarships for underrepresented students, faculty and student research collaborations and programmatic support.

# UNIVERSITY SUPPORT

As the resource and support needs of the CSU continue to evolve, strong university support is vital to our current and long-term success.

New gifts and campaigns have met and surpassed giving goals at several campuses thanks to incredible donors and leaders helping to provide for short-term and long-term success across the CSU.



## SACRAMENTO STATE PLANETARIUM RECEIVES BROAD COMMUNITY SUPPORT

A newly-opened planetarium at California State University, Sacramento has enjoyed broad community support through the “Seat Under the Stars” campaign, where a \$1,000 donation to support the building’s operations earns the donor’s name permanently affixed on the back of one of the building’s 120 seats. The centerpiece of the new Ernest E. Tschannen Science Complex, the planetarium offers high-definition 360-degree tours of the solar system. It will serve Sac State’s students and faculty as well as the community at large, welcoming schoolchildren and hosting stargazing shows and presentations on topics from astronomy to history.



Cal Maritime students

## JACK RAYMOND MATCHES CSUSM GIVING DAY FUNDS TO DRIVE PHILANTHROPY

Matching donations from a longtime friend and benefactor of California State University San Marcos have propelled the annual Giving Day fundraiser to new heights. Thanks in large part to CSUSM Foundation Board Member Jack Raymond’s commitment to doubling individual gifts, the university’s Giving Day achieved unprecedented success in 2018, with nearly 1,500 gifts made in a 24-hour period. In total, the university raised \$448,955 on Tuesday, November 27, 2018—an astounding increase of 2,877 percent over the inaugural Giving Day just three years earlier.

## CAL MARITIME ACADEMY PARENTS RAISE FUNDS TO SUPPORT ITS STUDENTS

A cadre of parents has pooled its efforts to establish California State University Maritime Academy’s first-ever parent fundraising committee. Motivated by a desire to have a positive impact on the quality of life for cadets, the parents dedicated their efforts to create a more inviting and comfortable waterfront. Anticipated enhancements include providing additional shade, comfortable seating, installation of power and lighting and the extension of existing walking paths.

**“Dogs can sense when you’re in trauma. You don’t have to say any words. You can just sit there and pet them.”**

*– Madison Cummings,  
Student,  
CSU Channel Islands*



**GIFT OF \$220,000 BRINGS THERAPY AND SERVICE DOGS TO CHANNEL ISLANDS STUDENTS**

A \$220,000 gift from the Dr. Richard Grossman Community Foundation will allow students at California State University Channel Islands to benefit from therapy and service dogs. The donation will fund two campus therapy dogs, along with five individual service dogs for student veterans with post-traumatic stress. “Doc,” the first campus therapy dog, arrived on campus in October 2018 to help relieve students’ stress about things like studies and exams. But after the Borderline bar shooting and fires that caused campus evacuations, Doc’s responsibilities multiplied and a calendar was created so that students could sign up to walk him.

**CAL MARITIME ALUMNUS FUNDS STATUE HONORING MASTER OF TRAINING SHIP GOLDEN BEAR**

A bronze statue honoring a longtime California State University Maritime Academy faculty member and master of the Training Ship Golden Bear now stands in the university’s Alumni Plaza, thanks to donor Capt. Greg Turner of the class of 1972. The bronze statue, created by noted sculptor Jim Callahan and titled “The Navigator,” honors Capt. William Aguilar, class of 1934.

# STUDENT ATHLETICS

Across the California State University, student athletics encourages fitness, teamwork, cooperation, discipline, social skills and time management. These attributes benefit students both on the playing field and in the classroom and continue to serve them well long after they graduate.

Building character, grit and integrity, athletics programs across all 23 campuses benefit not only the athletes but students, faculty and their communities at large by bringing people together and instilling feelings of campus pride with a sense of belonging.



## **\$1 MILLION GRANT LIGHTS UP CSUMB ATHLETIC FIELDS**

A \$1 million grant from the Monterey Peninsula Foundation helped bring new stadium lights to California State University, Monterey Bay athletic fields. The funds helped purchase 16 stadium light fixtures—eight for baseball, four for softball and four for soccer—and helped transform all fields with a synthetic grass surface. The fields are fully utilized during the day and now CSUMB athletic programs will be able to use them into the evening.

## **\$150,000 ENDOWMENT FUNDS CSUSB GOLF SCHOLARSHIP**

The daughter of a California State University, San Bernardino alumnus recently donated \$150,000 to endow an athletics scholarship in her father's name. The William H. Colley Golf Scholarship will honor the Marine veteran who was once the top-ranked amateur in California. Colley's grandson, current CSUSB head golf coach, Kyle Emerson, said that the donations will help remedy the university's standing as the second-lowest budgeted golf program in its conference.



## **TWO MAJOR GIFTS SUPPORT SPARTAN FOOTBALL PROGRAM**

A \$500,000 commitment from Thomas E. Thompson and his wife, Jane Bradley, will fund a new Football Operations Center at San José State University and establish an athletics scholarship. A second gift of \$500,000 from an anonymous donor will also finance the operations center. The new center will include locker rooms, an auditorium, offices, spectator seating on the 50-yard line and a Hall of Champions event space.

## **THREE ENDOWMENTS POWER STUDENT SUCCESS CENTER AND CSUB ATHLETICS**

Legacy gifts from Gloria M. Burr and the late Billy D. Reed Jr. will establish three endowments at California State University, Bakersfield and support the Kegley Center for Student Success. The first endowment will provide scholarships for students pursuing a Single Subject, Multiple Subject, or Special Education Teaching Credential. The second endowment will provide a scholar-athlete who has the greatest financial need an opportunity to study at CSU Bakersfield. And the third will provide annual funds to support capital improvements in athletics.

# PUBLIC BENEFIT

To further the California State University's mission to provide public services that enrich the university and its communities, the CSU partners with community leaders and dedicated donors across the state to establish and encourage strong and inclusive communities.

Donor support also helps the CSU advance social mobility, resolve health disparities and tackle real-world problems by broadening practice-based training to improve learning outcomes for K-12 teachers and to develop culturally competent health practitioners to promote wellness in underserved communities.



## HIGH SCHOOL STUDENTS LEARN ABOUT STEM CAREERS AT VIRTUAL REALITY CAMP

California State University, East Bay hosted a virtual reality camp funded by the Broadcom Foundation to introduce Hayward-area high school students to undergraduate degrees in science, technology, engineering and mathematics. Using gaming and instructional design, the students spent a week exploring simulation research and interacting with Cal State East Bay engineering students, virtual reality professionals and industry representatives. In the process, they gained an understanding of the skills they will need for careers in STEM fields.



*Students in the RN to BSN program at Stanislaus State*

## RND AMPHITHEATER NAMING HONORS \$4 MILLION GIFT

The naming of the RND Amphitheater at California State University, Monterey Bay honors a \$4 million gift from philanthropist Robert Nathan Danziger and his commitment to education, music and the arts in Monterey and the Central Coast region. The gift will support the College of Arts, Humanities, and Social Sciences' collaboration with the Monterey Jazz Festival as well as an unrestricted fund to address areas of greatest need on campus.

## GRANT POINTS STUDENTS TO HEALTH CARE PROFESSIONS

A \$60,000 grant from the Stanislaus Community Foundation Health Careers Fund will allow California State University, Stanislaus to fund a two-year health careers navigator position to generate interest in health care professions among local high school and community college students. The goal is to help grow Stanislaus County's health care workforce, address the region's shortage of health care professionals and improve health outcomes for area residents.

**“With this gift, Stan State and these three community colleges have a chance to dream big, co-create and jointly sponsor more meaningful opportunities for our transfer students.”**

*— Gitanjali Kaul,  
Vice President for Strategic Planning,  
Enrollment Management  
and Innovation, Stanislaus State*



**ENDOWMENT BRINGS WORLD CLASS SPEAKERS TO SONOMA STATE**

Social justice is at the heart of a \$250,000 endowment a professor emerita and her late husband made to Sonoma State University in hopes that the gift will spur others to donate. The fund supports the H. Andréa Neves and Barton Evans Social Justice Lecture Series at Sonoma State University, a joint venture of the School of Social Sciences and the School of Education.

**GRANT SUPPORTS ASSOCIATE DEGREE FOR TRANSFER STUDENTS FROM AREA JUNIOR COLLEGES**

A \$678,000 grant from the College Futures Foundation will help California State University, Stanislaus increase the number of students transferring from area junior colleges, while bolstering transfer student retention and graduation rates. The gift will open doors for joint faculty development to improve curricular alignment among Stanislaus State, Modesto Junior College, San Joaquin Delta College and Merced College. It will also aid the hiring of additional counselors and advisers.

SCHOLAR LEGACY GENEROSITY HISTORY ENDOWED GRANT  
ALUMNUS PROVIDE IMPROVE STUDIES ENRICHMENT  
CENTER VETERANS CREATES RENOWNED ATHLETICS ASPIRING BILINGUA  
ANSION PROGRAMS DONOR TECHNOLOGY SCIENCE SUPPORT  
LOCAL REWARDING INCREASE HELPED REGIO  
THE CALIFORNIA STATE UNIVERSITY  
MARKABLE BUSINESS ACADEMIC ENGINEERING TEACHING COMMUNITY ST  
FUNDRAISING RESEARCH INNOVATION ART ALUMN  
MINATE FACULTY WORKFORCE  
LEADERSHIP OUTCOME CAMPAIGN INTERNATIONAL  
CREASE COMMUNITY ENTREPRENEURSHIP IMPACT PREPAR  
TRANSFORMATIVE FINANCIAL AID EDUCATION COLLABORATIONS  
COMMITMENT COLLABORATIONS UNDERSTANDING HONORS  
ANCIAL AID PHILANTHROPIC GIVING EXCELLENCE SCHOLARSH  
EDUCATION FUTURE STUDENTS ACHIEVEMENT SUCCESS DEVELOPMENT CAR  
LEGACY GENEROSITY HISTORY ENDOWED GRANT LEARNING  
ALUMNUS PROVIDE IMPROVE STUDIES ENRICHMENT  
THE CALIFORNIA STATE UNIVERSITY

# APPENDIX

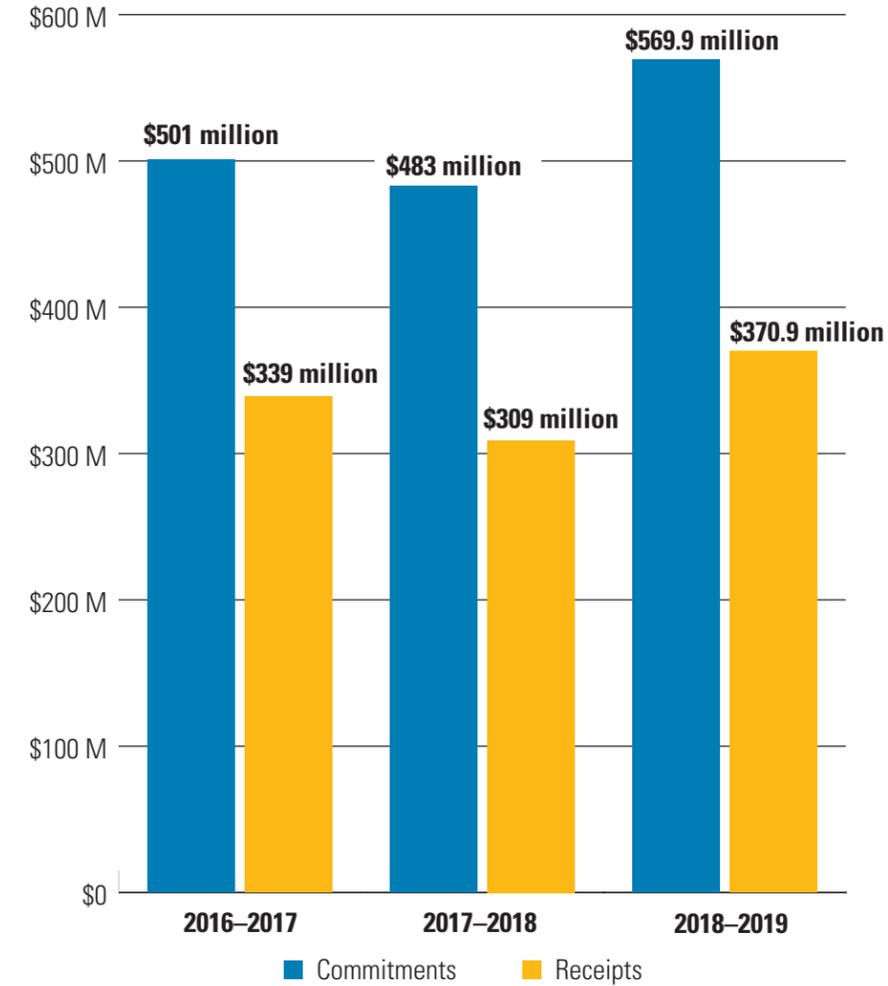


**PHILANTHROPIC PRODUCTIVITY**

GROUP I	2016–2017 Total Gift Commitments	2017–2018 Total Gift Commitments	2018–2019 Total Gift Commitments	Three-Year Average	2016–2017 Total Gift Receipts	2017–2018 Total Gift Receipts	2018–2019 Total Gift Receipts	Three-Year Average
Bakersfield	\$3,626,839	\$3,562,068	\$7,710,367	\$4,966,425	\$3,931,269	\$3,147,595	\$4,618,606	\$3,899,157
Channel Islands	\$2,012,971	\$2,817,809	\$3,878,318	\$2,903,033	\$2,643,308	\$3,423,409	\$3,603,770	\$3,223,496
Dominguez Hills	\$6,274,686	\$4,254,995	\$4,828,696	\$5,119,459	\$6,904,613	\$3,260,211	\$5,621,753	\$5,262,192
East Bay	\$3,167,637	\$20,102,503	\$7,116,510	\$10,128,883	\$1,802,403	\$2,049,684	\$3,472,278	\$2,441,455
Humboldt	\$4,106,249	\$7,560,548	\$7,011,841	\$6,226,213	\$4,730,779	\$4,678,175	\$4,608,647	\$4,672,534
Maritime Academy	\$2,108,171	\$2,864,078	\$2,397,006	\$2,456,418	\$2,155,968	\$2,802,284	\$2,383,534	\$2,447,262
Monterey Bay	\$7,982,238	\$9,210,183	\$15,349,357	\$10,847,259	\$5,852,156	\$5,626,799	\$9,938,197	\$7,139,051
San Bernardino	\$9,239,166	\$8,134,946	\$6,592,728	\$7,988,947	\$15,681,888	\$5,593,685	\$6,268,662	\$9,181,412
San Marcos	\$7,398,978	\$9,781,041	\$10,685,627	\$9,288,549	\$3,597,851	\$5,511,852	\$6,769,732	\$5,293,145
Stanislaus	\$3,773,462	\$5,462,693	\$3,454,377	\$4,230,177	\$2,674,544	\$4,236,579	\$2,912,596	\$3,274,573
	<b>\$49,690,397</b>	<b>\$73,750,864</b>	<b>\$69,024,827</b>	<b>\$64,155,363</b>	<b>\$49,974,779</b>	<b>\$40,330,273</b>	<b>\$50,197,775</b>	<b>\$46,834,276</b>
<b>GROUP II</b>								
Chico	\$14,243,332	\$16,114,540	\$12,534,161	\$14,297,344	\$7,739,647	\$7,712,540	\$9,483,362	\$8,311,850
Los Angeles	\$14,154,100	\$8,433,102	\$12,369,869	\$11,652,357	\$17,227,527	\$6,660,261	\$7,449,296	\$10,445,695
Pomona	\$15,400,415	\$22,811,559	\$9,986,482	\$16,066,152	\$6,562,760	\$7,939,676	\$9,586,911	\$8,029,782
Sacramento	\$26,353,429	\$23,105,261	\$27,411,285	\$25,623,325	\$16,193,560	\$15,670,026	\$13,530,916	\$15,131,501
Sonoma	\$8,692,352	\$13,037,471	\$8,662,083	\$10,130,635	\$6,317,559	\$5,805,555	\$7,767,223	\$6,630,112
	<b>\$78,843,628</b>	<b>\$83,501,933</b>	<b>\$70,963,880</b>	<b>\$77,769,814</b>	<b>\$54,041,053</b>	<b>\$43,788,058</b>	<b>\$47,817,708</b>	<b>\$48,548,940</b>
<b>GROUP III</b>								
Fresno	\$18,327,765	\$22,441,034	\$27,602,828	\$22,790,542	\$14,287,031	\$19,879,909	\$20,811,957	\$18,326,299
Fullerton	\$21,517,735	\$23,870,372	\$28,200,665	\$24,529,591	\$17,878,672	\$14,937,543	\$13,844,163	\$15,553,459
Long Beach	\$29,419,422	\$30,992,373	\$38,909,500	\$33,107,098	\$23,688,771	\$23,629,605	\$16,364,275	\$21,227,550
Northridge	\$22,475,329	\$31,657,297	\$21,990,618	\$25,374,415	\$14,799,898	\$14,864,907	\$16,371,608	\$15,345,471
San Diego	\$87,631,097	\$76,819,116	\$111,209,307	\$91,886,507	\$85,455,394	\$77,190,332	\$89,466,049	\$84,037,258
San Francisco	\$17,131,701	\$18,673,402	\$59,922,610	\$31,909,238	\$14,870,941	\$13,373,913	\$53,274,551	\$27,173,135
San José	\$30,351,910	\$34,146,816	\$18,635,501	\$27,711,409	\$21,533,330	\$21,889,986	\$17,921,150	\$20,448,155
San Luis Obispo	\$141,743,555	\$82,457,781	\$117,390,671	\$113,864,002	\$38,308,710	\$35,214,747	\$38,890,734	\$37,471,397
	<b>\$368,598,514</b>	<b>\$321,058,191</b>	<b>\$423,861,700</b>	<b>\$371,172,802</b>	<b>\$230,822,747</b>	<b>\$220,980,942</b>	<b>\$266,944,487</b>	<b>\$239,582,725</b>
Chancellor's Office	\$4,101,191	\$4,787,298	\$6,131,442	\$5,006,644	\$4,260,641	\$4,131,262	\$5,976,978	\$4,789,627
<b>GRAND TOTAL</b>	<b>\$501,233,730</b>	<b>\$483,098,286</b>	<b>\$569,981,849</b>	<b>\$518,104,622</b>	<b>\$339,099,220</b>	<b>\$309,230,535</b>	<b>\$370,936,948</b>	<b>\$339,755,568</b>

Note 1: Gift Commitments include new gifts, new pledges and revocable deferred commitments. Gift Receipts reflect assets received by the university in the form of new gifts and pledge payments.  
 Note 2: In 2017–2018 the Chancellor's Office increased gift commitments by \$555,386 due to an error in pledge reporting.

**PHILANTHROPIC PRODUCTIVITY**

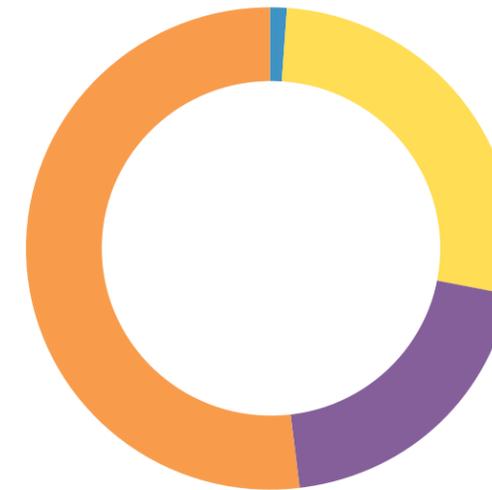


## CHARITABLE GIFT COMMITMENTS

GROUP I	New Charitable Gifts	New Pledges	Revocable Deferred Gifts (Face Value)	Native American & Government Contributions	Total Gift Commitments	2018–2019 General Fund	Gift Commitments as a Percent of the General Fund
Bakersfield	\$3,243,402	\$4,466,965	\$0	\$0	\$7,710,367	\$77,599,709	10%
Channel Islands	\$2,798,710	\$85,908	\$960,000	\$33,700	\$3,878,318	\$83,022,710	5%
Dominguez Hills	\$3,008,378	\$1,497,668	\$300,000	\$22,650	\$4,828,696	\$94,336,852	5%
East Bay	\$1,727,720	\$4,403,790	\$985,000	\$0	\$7,116,510	\$103,073,561	7%
Humboldt	\$3,773,102	\$2,379,709	\$855,000	\$4,030	\$7,011,841	\$85,517,210	8%
Maritime Academy	\$2,314,451	\$82,555	\$0	\$0	\$2,397,006	\$34,826,276	7%
Monterey Bay	\$9,411,610	\$5,937,747	\$0	\$0	\$15,349,357	\$80,161,383	19%
San Bernardino	\$4,232,335	\$1,187,671	\$50,000	\$1,122,722	\$6,592,728	\$123,615,708	5%
San Marcos	\$4,758,992	\$3,179,305	\$2,635,000	\$112,330	\$10,685,627	\$90,246,752	12%
Stanislaus	\$2,472,052	\$878,029	\$100,000	\$4,296	\$3,454,377	\$74,133,047	5%
	<b>\$37,740,752</b>	<b>\$24,099,347</b>	<b>\$5,885,000</b>	<b>\$1,299,728</b>	<b>\$69,024,827</b>	<b>\$846,533,208</b>	<b>8%</b>
<b>GROUP II</b>							
Chico	\$7,864,160	\$3,335,000	\$1,335,001	\$0	\$12,534,161	\$126,690,932	10%
Los Angeles	\$5,312,119	\$5,187,750	\$1,870,000	\$0	\$12,369,869	\$166,135,539	7%
Pomona	\$5,802,349	\$2,392,805	\$1,791,328	\$0	\$9,986,482	\$156,865,142	6%
Sacramento	\$11,300,871	\$485,914	\$14,874,500	\$750,000	\$27,411,285	\$171,045,037	16%
Sonoma	\$6,991,023	\$250,000	\$690,000	\$731,060	\$8,662,083	\$74,350,783	12%
	<b>\$37,270,522</b>	<b>\$11,651,469</b>	<b>\$20,560,829</b>	<b>\$1,481,060</b>	<b>\$70,963,880</b>	<b>\$695,087,433</b>	<b>10%</b>
<b>GROUP III</b>							
Fresno	\$17,696,260	\$9,045,532	\$848,187	\$12,850	\$27,602,828	\$164,229,432	17%
Fullerton	\$12,588,166	\$3,365,198	\$12,247,301	\$0	\$28,200,665	\$203,247,561	14%
Long Beach	\$10,477,702	\$19,518,798	\$8,913,000	\$0	\$38,909,500	\$218,734,336	18%
Northridge	\$8,095,295	\$8,446,071	\$5,437,252	\$12,000	\$21,990,618	\$217,327,496	10%
San Diego	\$84,367,176	\$7,548,613	\$19,243,853	\$49,665	\$111,209,307	\$206,788,796	54%
San Francisco	\$47,673,225	\$9,261,884	\$2,987,501	\$0	\$59,922,610	\$180,496,659	33%
San José	\$11,742,928	\$6,042,573	\$850,000	\$0	\$18,635,501	\$171,724,882	11%
San Luis Obispo	\$25,165,825	\$12,739,846	\$79,485,000	\$0	\$117,390,671	\$146,283,968	80%
	<b>\$217,806,577</b>	<b>\$75,968,515</b>	<b>\$130,012,094</b>	<b>\$74,515</b>	<b>\$423,861,700</b>	<b>\$1,508,833,130</b>	<b>28%</b>
Chancellor's Office	\$4,731,442	\$1,400,000	\$0	\$0	\$6,131,442	\$152,938,053	4%
<b>GRAND TOTAL</b>	<b>\$297,549,293</b>	<b>\$113,119,331</b>	<b>\$156,457,923</b>	<b>\$2,855,303</b>	<b>\$569,981,849</b>	<b>\$3,203,391,824</b>	<b>18%</b>

Note 1: Group I campuses generally have fewer than 5,000 individual donors, fewer than 10 full-time professional fundraisers and less than \$50 million in endowment market value. Group II campuses generally have between 5,000 and 10,000 individual donors, between 10 and 20 full-time professional fundraisers and between \$50 million and \$100 million in endowment market value. Group III campuses generally have more than 10,000 individual donors, more than 20 full-time professional fundraisers and over \$100 million in endowment market value.

## GIFT COMMITMENTS



- New Charitable Gifts **52%**
- Revocable Deferred Gifts (Face Value) **27%**
- New Pledges **20%**
- Native American & Government Contributions **1%**



**GIFT RECEIPTS BY SOURCE**

GROUP I	INDIVIDUALS			ORGANIZATIONS			Gift Receipts Total	Total Number Individual Donors
	Alumni	Parents	Other Individuals	Foundations	Corporations	Other Organizations		
Bakersfield	\$197,887	\$7,250	\$1,042,293	\$516,561	\$2,644,846	\$209,769	\$4,618,606	1,246
Channel Islands	\$25,243	\$7,348	\$1,655,203	\$722,205	\$903,101	\$290,670	\$3,603,770	1,577
Dominguez Hills	\$200,914	\$7,943	\$3,144,812	\$1,036,133	\$1,040,182	\$191,769	\$5,621,753	2,271
East Bay	\$889,636	\$14,624	\$952,619	\$679,466	\$619,270	\$316,663	\$3,472,278	1,889
Humboldt	\$961,307	\$68,033	\$990,903	\$818,286	\$514,663	\$1,255,455	\$4,608,647	4,791
Maritime Academy	\$539,858	\$93,072	\$678,150	\$52,812	\$844,207	\$175,435	\$2,383,534	791
Monterey Bay	\$11,207	\$23,520	\$4,296,853	\$2,323,199	\$1,815,708	\$1,467,710	\$9,938,197	10,044
San Bernardino	\$318,906	\$24,529	\$2,715,440	\$1,520,288	\$1,369,812	\$319,687	\$6,268,662	4,319
San Marcos	\$109,237	\$47,467	\$2,618,161	\$2,664,263	\$1,150,128	\$180,476	\$6,769,732	2,579
Stanislaus	\$195,447	\$0	\$1,098,344	\$927,364	\$643,484	\$47,957	\$2,912,596	1,629
	<b>\$3,449,642</b>	<b>\$293,786</b>	<b>\$19,192,778</b>	<b>\$11,260,577</b>	<b>\$11,545,401</b>	<b>\$4,455,591</b>	<b>\$50,197,775</b>	<b>31,136</b>
<b>GROUP II</b>								
Chico	\$2,242,994	\$622,766	\$2,179,929	\$1,098,409	\$1,402,910	\$1,936,354	\$9,483,362	18,358
Los Angeles	\$774,885	\$7,550	\$699,592	\$3,086,590	\$2,087,389	\$793,290	\$7,449,296	5,329
Pomona	\$3,978,836	\$96,498	\$2,816,771	\$808,615	\$1,171,911	\$714,280	\$9,586,911	7,094
Sacramento	\$2,304,831	\$118,850	\$7,695,916	\$1,336,477	\$1,400,705	\$674,137	\$13,530,916	39,229
Sonoma	\$142,537	\$78,107	\$2,750,359	\$2,884,232	\$1,866,113	\$45,875	\$7,767,223	1,511
	<b>\$9,444,083</b>	<b>\$923,771</b>	<b>\$16,142,567</b>	<b>\$9,214,323</b>	<b>\$7,929,028</b>	<b>\$4,163,936</b>	<b>\$47,817,708</b>	<b>71,521</b>
<b>GROUP III</b>								
Fresno	\$4,315,381	\$167,665	\$6,447,205	\$2,265,245	\$5,192,072	\$2,424,389	\$20,811,957	11,585
Fullerton	\$1,161,828	\$478,797	\$3,334,423	\$2,817,453	\$4,809,844	\$1,241,817	\$13,844,163	13,104
Long Beach	\$3,100,171	\$755,635	\$4,795,729	\$3,141,434	\$3,533,630	\$1,037,676	\$16,364,275	19,302
Northridge	\$2,876,304	\$203,278	\$2,134,024	\$7,633,523	\$3,065,364	\$459,115	\$16,371,608	18,266
San Diego	\$14,190,554	\$852,353	\$25,892,850	\$26,896,456	\$8,728,503	\$12,905,333	\$89,466,049	78,293
San Francisco	\$15,369,460	\$20,821	\$2,780,796	\$31,322,547	\$2,423,568	\$1,357,359	\$53,274,551	4,291
San José	\$3,343,500	\$66,225	\$3,854,312	\$3,884,184	\$6,654,880	\$118,049	\$17,921,150	6,565
San Luis Obispo	\$6,422,700	\$1,982,218	\$2,572,544	\$11,070,640	\$10,416,563	\$6,426,068	\$38,890,734	13,863
	<b>\$50,779,898</b>	<b>\$4,526,992</b>	<b>\$51,811,883</b>	<b>\$89,031,482</b>	<b>\$44,824,424</b>	<b>\$25,969,806</b>	<b>\$266,944,487</b>	<b>165,269</b>
Chancellor's Office	\$0	\$0	\$670,065	\$4,926,000	\$280,204	\$100,709	\$5,976,978	182
<b>GRAND TOTAL</b>	<b>\$63,673,623</b>	<b>\$5,744,549</b>	<b>\$87,817,293</b>	<b>\$114,432,382</b>	<b>\$64,579,057</b>	<b>\$34,690,042</b>	<b>\$370,936,948</b>	<b>268,108</b>

Note 1: Number of Individual Donors includes alumni, parents, faculty, staff, students and friends of the university.

**GIFT RECEIPTS BY SOURCE**



- Other Individuals **24%**
- Alumni **17%**
- Parents **2%**
- Foundations **31%**
- Corporations **17%**
- Other Organizations **9%**



**GIFT RECEIPTS BY PURPOSE**

GROUP I	CURRENT PROGRAMS		CAPITAL PURPOSES			IRREVOCABLE DEFERRED GIFTS	
	Unrestricted	Restricted	Campus Improvements: Property, Buildings and Equipment	Endowment: Unrestricted	Endowment: Restricted	Present Value	Gift Receipts Total
Bakersfield	\$166,034	\$3,819,675	\$300,000	\$0	\$332,897	\$0	\$4,618,606
Channel Islands	\$324,114	\$1,988,339	\$1,113,135	\$0	\$178,182	\$0	\$3,603,770
Dominguez Hills	\$650,075	\$3,002,021	\$20,525	\$243,825	\$1,705,307	\$0	\$5,621,753
East Bay	\$39,191	\$2,239,413	\$142,045	\$0	\$1,040,028	\$11,601	\$3,472,278
Humboldt	\$188,704	\$3,466,987	\$10,000	\$50	\$925,039	\$17,867	\$4,608,647
Maritime Academy	\$1,156,124	\$638,423	\$297,325	\$0	\$291,662	\$0	\$2,383,534
Monterey Bay	\$32,527	\$6,096,812	\$3,334,678	\$0	\$474,180	\$0	\$9,938,197
San Bernardino	\$11,043	\$4,457,196	\$1,320,745	\$0	\$479,678	\$0	\$6,268,662
San Marcos	\$69,571	\$5,911,591	\$10,020	\$51,052	\$727,498	\$0	\$6,769,732
Stanislaus	\$45,308	\$2,653,920	\$2,443	\$0	\$210,925	\$0	\$2,912,596
	<b>\$2,682,691</b>	<b>\$34,274,377</b>	<b>\$6,550,916</b>	<b>\$294,927</b>	<b>\$6,365,396</b>	<b>\$29,468</b>	<b>\$50,197,775</b>
<b>GROUP II</b>							
Chico	\$403,125	\$6,479,979	\$429,543	\$187,757	\$1,982,958	\$0	\$9,483,362
Los Angeles	\$412,979	\$4,984,812	\$1,222,931	\$0	\$824,531	\$4,043	\$7,449,296
Pomona	\$96,301	\$5,538,153	\$396,950	\$0	\$3,325,707	\$229,800	\$9,586,911
Sacramento	\$258,355	\$10,208,578	\$907,433	\$0	\$2,156,550	\$0	\$13,530,916
Sonoma	\$26,064	\$4,910,746	\$1,702,666	\$0	\$256,441	\$871,306	\$7,767,223
	<b>\$1,196,824</b>	<b>\$32,122,268</b>	<b>\$4,659,523</b>	<b>\$187,757</b>	<b>\$8,546,187</b>	<b>\$1,105,149</b>	<b>\$47,817,708</b>
<b>GROUP III</b>							
Fresno	\$4,786	\$15,779,858	\$434,881	\$12,433	\$4,579,999	\$0	\$20,811,957
Fullerton	\$1,506,165	\$9,767,979	\$218,027	\$150,000	\$2,195,720	\$6,273	\$13,844,163
Long Beach	\$514,419	\$11,268,006	\$2,324,922	\$0	\$2,256,928	\$0	\$16,364,275
Northridge	\$100,070	\$9,048,037	\$1,135,973	\$0	\$5,908,205	\$179,323	\$16,371,608
San Diego	\$36,188	\$71,484,286	\$10,927,060	\$0	\$4,037,883	\$2,980,633	\$89,466,049
San Francisco	\$304,796	\$7,892,390	\$95,349	\$177,828	\$44,730,067	\$74,121	\$53,274,551
San José	\$230,986	\$14,358,850	\$12,784	\$588,951	\$2,367,279	\$362,300	\$17,921,150
San Luis Obispo	\$333,792	\$25,393,582	\$8,405,467	\$0	\$4,718,932	\$38,961	\$38,890,734
	<b>\$3,031,202</b>	<b>\$164,992,988</b>	<b>\$23,554,463</b>	<b>\$929,212</b>	<b>\$70,795,013</b>	<b>\$3,641,611</b>	<b>\$266,944,487</b>
Chancellor's Office	\$111,135	\$5,667,481	\$0	\$0	\$198,362	\$0	\$5,976,978
<b>GRAND TOTAL</b>	<b>\$7,021,852</b>	<b>\$237,057,114</b>	<b>\$34,764,902</b>	<b>\$1,411,896</b>	<b>\$85,904,958</b>	<b>\$4,776,228</b>	<b>\$370,936,948</b>

**GIFT RECEIPTS BY PURPOSE**



- CAPITAL PURPOSES**
- Endowment Restricted **23%**
  - Campus Improvements **9%**
  - Endowment Unrestricted **1%**
  - Irrevocable Deferred Gifts **1%**

- CURRENT PROGRAMS**
- Restricted Current Operations **64%**
  - Unrestricted Current Operations **2%**

- GIFT RECEIPTS FOR RESTRICTED PURPOSES**
- Faculty Support and Academic Enrichment **37%**
  - Public Service Programs **22%**
  - Additional University Priorities **18%**
  - Student Scholarships **14%**
  - Athletics **7%**
  - Equipment and Facility Improvements **2%**



## ALUMNI

GROUP I	Number of Addressable		Alumni Donors	Total Alumni Contributions
	Alumni	Alumni Solicited		
Bakersfield	53,143	36,148	417	\$197,887
Channel Islands	19,956	17,602	889	\$25,243
Dominguez Hills	98,616	97,018	1,943	\$200,914
East Bay	142,985	37,330	1,018	\$889,636
Humboldt	58,514	31,601	2,189	\$961,307
Maritime Academy	5,177	4,994	427	\$539,858
Monterey Bay	20,686	19,674	198	\$11,207
San Bernardino	90,054	84,855	2,647	\$318,906
San Marcos	46,063	38,475	1,072	\$109,237
Stanislaus	58,457	44,431	958	\$195,447
	<b>593,651</b>	<b>412,128</b>	<b>11,758</b>	<b>\$3,449,642</b>
<b>GROUP II</b>				
Chico	160,180	23,124	7,402	\$2,242,994
Los Angeles	168,881	167,710	4,105	\$774,885
Pomona	186,726	142,243	4,104	\$3,978,836
Sacramento	244,818	162,495	1,858	\$2,304,831
Sonoma	60,264	36,289	284	\$142,537
	<b>820,869</b>	<b>531,861</b>	<b>17,753</b>	<b>\$9,444,083</b>
<b>GROUP III</b>				
Fresno	200,966	115,251	6,554	\$4,315,381
Fullerton	270,539	232,193	6,467	\$1,161,828
Long Beach	318,816	188,666	8,839	\$3,100,171
Northridge	361,197	257,866	11,525	\$2,876,304
San Diego	472,222	196,072	15,738	\$14,190,554
San Francisco	303,823	13,493	2,245	\$15,369,460
San José	259,685	217,695	3,493	\$3,343,500
San Luis Obispo	202,369	116,193	5,931	\$6,422,700
	<b>2,389,617</b>	<b>1,337,429</b>	<b>60,792</b>	<b>\$50,779,898</b>
<b>GRAND TOTAL</b>	<b>3,804,137</b>	<b>2,281,418</b>	<b>90,303</b>	<b>\$63,673,623</b>

## PLANNED GIVING

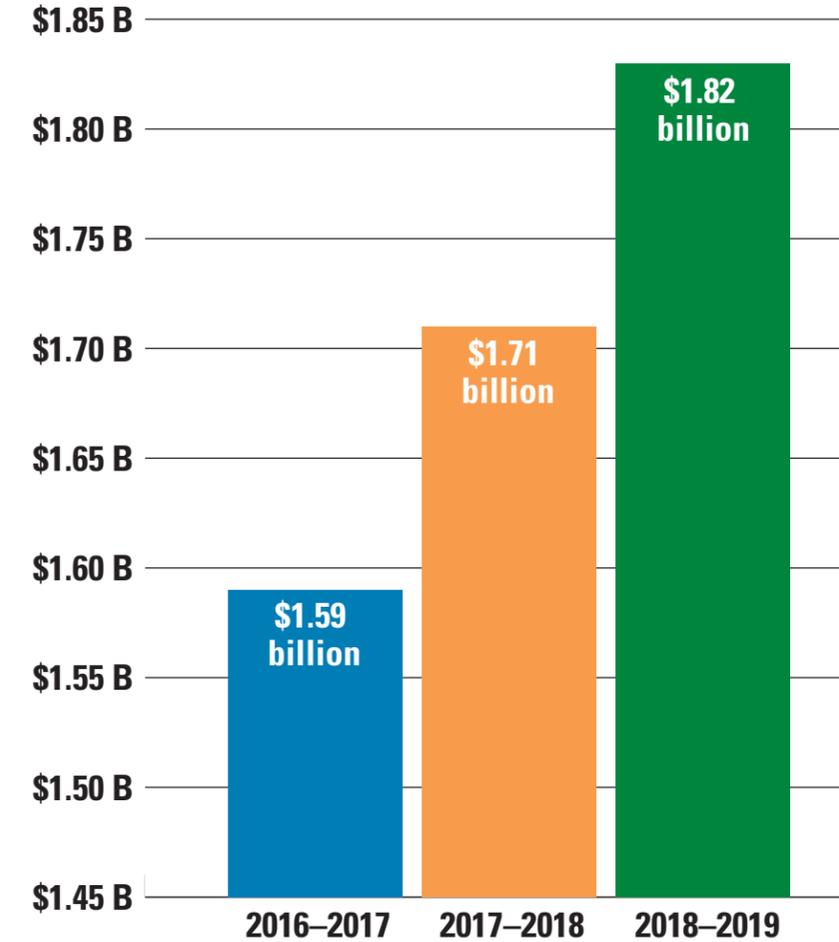
GROUP I	IRREVOCABLE DEFERRED GIFTS		REVOCABLE DEFERRED GIFTS	
	Face Value	Present Value	Face Value	Present Value
Bakersfield	\$0	\$0	\$0	\$0
Channel Islands	\$0	\$0	\$960,000	\$332,697
Dominguez Hills	\$0	\$0	\$300,000	\$300,000
East Bay	\$20,000	\$11,601	\$985,000	\$20,000
Humboldt	\$50,000	\$17,867	\$855,000	\$482,248
Maritime Academy	\$0	\$0	\$0	\$0
Monterey Bay	\$0	\$0	\$0	\$0
San Bernardino	\$0	\$0	\$50,000	\$33,585
San Marcos	\$0	\$0	\$2,635,000	\$1,455,267
Stanislaus	\$0	\$0	\$100,000	\$48,443
	<b>\$70,000</b>	<b>\$29,468</b>	<b>\$5,885,000</b>	<b>\$2,672,240</b>
<b>GROUP II</b>				
Chico	\$0	\$0	\$1,335,001	\$1,098,736
Los Angeles	\$10,000	\$4,043	\$1,870,000	\$828,699
Pomona	\$400,000	\$229,800	\$1,791,328	\$576,349
Sacramento	\$0	\$0	\$14,874,500	\$10,870,411
Sonoma	\$990,753	\$871,306	\$690,000	\$492,748
	<b>\$1,400,753</b>	<b>\$1,105,149</b>	<b>\$20,560,829</b>	<b>\$13,866,943</b>
<b>GROUP III</b>				
Fresno	\$0	\$0	\$848,187	\$443,864
Fullerton	\$10,000	\$6,273	\$12,247,301	\$5,774,654
Long Beach	\$0	\$0	\$8,913,000	\$4,608,176
Northridge	\$251,062	\$179,323	\$5,437,252	\$3,301,594
San Diego	\$5,056,018	\$2,980,633	\$19,243,853	\$20,003,593
San Francisco	\$100,000	\$74,121	\$2,987,501	\$1,933,735
San José	\$2,096,903	\$362,300	\$850,000	\$387,123
San Luis Obispo	\$85,000	\$38,961	\$79,485,000	\$40,539,858
	<b>\$7,598,983</b>	<b>\$3,641,611</b>	<b>\$130,012,094</b>	<b>\$76,992,597</b>
Chancellor's Office	\$0	\$0	\$0	\$0
<b>GRAND TOTAL</b>	<b>\$9,069,736</b>	<b>\$4,776,228</b>	<b>\$156,457,923</b>	<b>\$93,531,780</b>



**ENDOWMENT**

GROUP I	2016–2017 Market Value	2017–2018 Market Value	2018–2019 Market Value	2017–2018 to 2018–2019 Comparison		2018–2019 Investment Return Rate	Three-Year Average	Five-Year Average	Ten-Year Average	2018–2019 Gifts to Endowment	2018–2019 Endowment Distribution
				Amount	Percentage						
Bakersfield	\$23,939,540	\$25,729,752	\$25,474,074	-\$255,678	-0.99%	2.78%	5.92%	2.44%	7.66%	\$332,897	\$890,668
Channel Islands	\$15,136,855	\$15,718,002	\$16,049,730	\$331,728	2.11%	5.25%	6.68%	3.93%	8.19%	\$178,182	\$585,703
Dominguez Hills	\$9,942,739	\$10,393,538	\$12,542,519	\$2,148,981	20.68%	6.20%	9.13%	4.95%	8.73%	\$1,949,132	\$434,083
East Bay	\$16,173,108	\$17,090,644	\$17,838,030	\$747,386	4.37%	2.30%	7.16%	4.01%	7.85%	\$1,040,028	\$620,009
Humboldt	\$30,085,888	\$30,058,632	\$31,287,672	\$1,229,040	4.09%	4.05%	8.08%	5.19%	7.70%	\$925,089	\$1,082,466
Maritime Academy	\$8,152,623	\$8,764,384	\$9,246,845	\$482,461	5.50%	3.60%	5.39%	2.45%	6.42%	\$291,662	\$137,148
Monterey Bay	\$22,839,354	\$23,915,333	\$27,083,828	\$3,168,495	13.25%	5.00%	7.93%	4.56%	9.13%	\$474,180	\$1,010,630
San Bernardino	\$37,701,776	\$39,641,520	\$41,117,664	\$1,476,144	3.72%	4.50%	7.59%	4.08%	7.97%	\$479,678	\$1,413,127
San Marcos	\$24,096,974	\$25,007,293	\$26,288,717	\$1,281,424	5.12%	4.65%	8.76%	4.26%	8.94%	\$778,550	\$859,589
Stanislaus	\$13,538,063	\$16,358,618	\$16,552,261	\$193,643	1.18%	3.00%	5.77%	1.96%	3.60%	\$210,925	\$254,780
	<b>\$201,606,920</b>	<b>\$212,677,716</b>	<b>\$223,481,340</b>	<b>\$10,803,624</b>	<b>5.08%</b>	<b>4.13%</b>	<b>7.22%</b>	<b>3.80%</b>	<b>7.66%</b>	<b>\$6,660,323</b>	<b>\$7,288,203</b>
<b>GROUP II</b>											
Chico	\$60,995,401	\$64,728,583	\$65,293,330	\$564,747	0.87%	2.00%	6.83%	4.62%	7.43%	\$2,170,715	\$2,419,237
Los Angeles	\$38,770,108	\$40,070,947	\$42,527,931	\$2,456,984	6.13%	6.15%	7.33%	4.23%	7.75%	\$824,531	\$1,496,966
Pomona	\$96,139,499	\$99,711,469	\$101,598,664	\$1,887,195	1.89%	3.08%	8.16%	3.56%	8.28%	\$3,325,707	\$4,210,074
Sacramento	\$45,580,684	\$48,045,682	\$51,241,432	\$3,195,750	6.65%	5.48%	7.32%	4.37%	6.16%	\$2,156,550	\$1,515,026
Sonoma	\$47,076,962	\$49,080,742	\$52,281,185	\$3,200,443	6.52%	4.00%	7.00%	3.46%	6.53%	\$256,441	\$1,573,882
	<b>\$288,562,654</b>	<b>\$301,637,423</b>	<b>\$312,942,542</b>	<b>\$11,305,119</b>	<b>3.75%</b>	<b>4.14%</b>	<b>7.33%</b>	<b>4.24%</b>	<b>7.35%</b>	<b>\$8,733,944</b>	<b>\$11,215,185</b>
<b>GROUP III</b>											
Fresno	\$154,415,469	\$161,563,982	\$170,314,606	\$8,750,624	5.42%	7.23%	7.90%	4.63%	7.53%	\$4,592,432	\$5,993,569
Fullerton	\$61,233,989	\$64,984,100	\$68,754,849	\$3,770,749	5.80%	6.12%	6.95%	4.27%	7.39%	\$2,345,720	\$1,928,912
Long Beach	\$66,613,450	\$77,174,529	\$79,351,656	\$2,177,127	2.82%	4.76%	8.09%	4.83%	8.57%	\$2,256,928	\$3,077,550
Northridge	\$102,610,732	\$110,709,702	\$119,016,374	\$8,306,672	7.50%	6.46%	8.58%	4.92%	8.26%	\$5,908,205	\$3,470,128
San Diego	\$259,753,000	\$293,037,763	\$308,308,377	\$15,270,614	5.21%	5.40%	8.27%	4.58%	8.96%	\$4,037,883	\$9,592,875
San Francisco	\$83,743,511	\$90,778,660	\$137,080,483	\$46,301,823	51.01%	3.00%	6.70%	4.62%	6.69%	\$44,907,895	\$3,512,179
San José	\$142,939,567	\$150,056,030	\$153,212,205	\$3,156,175	2.10%	5.10%	8.13%	4.60%	8.74%	\$2,956,230	\$5,445,928
San Luis Obispo	\$209,754,181	\$220,534,684	\$227,678,094	\$7,143,410	3.24%	5.40%	8.37%	4.66%	8.83%	\$4,718,932	\$8,113,656
	<b>\$1,081,063,899</b>	<b>\$1,168,839,450</b>	<b>\$1,263,716,644</b>	<b>\$94,877,194</b>	<b>8.12%</b>	<b>5.43%</b>	<b>7.88%</b>	<b>4.49%</b>	<b>8.40%</b>	<b>\$71,724,225</b>	<b>\$41,134,797</b>
Chancellor's Office	\$23,614,906	\$25,070,216	\$25,106,297	\$36,081	0.14%	2.86%	8.13%	4.42%	7.99%	\$198,362	\$911,518
<b>GRAND TOTAL</b>	<b>\$1,594,848,379</b>	<b>\$1,708,224,805</b>	<b>\$1,825,246,823</b>	<b>\$117,022,018</b>	<b>6.85%</b>	<b>4.52%</b>	<b>7.51%</b>	<b>4.15%</b>	<b>7.72%</b>	<b>\$87,316,854</b>	<b>\$60,549,703</b>

**ENDOWMENT MARKET VALUE**



**4.52%**  
AVERAGE INVESTMENT RETURN

**\$60 MILLION**  
ENDOWMENT DISTRIBUTION

**\$87 MILLION**  
NEW GIFTS TO ENDOWMENT

Note 1: Investment returns are reported as net of investment fees.

Note 2: Peer Group and Systemwide investment returns are presented as equal-weighted averages.

Note 3: San Marcos increased 2017/2018 endowment market value by \$74,759 to correct a reporting error.

# DEFINITION OF TERMS



## DEFINITION OF TERMS

### CHARITABLE GIFT COMMITMENTS

The data represent current-year performance in developing philanthropic support for the institution. In addition to recognizing new gifts generated to support the institution, this measure acknowledges the important work achieved in securing ongoing commitments through multiyear pledges and support promised through testamentary provisions in wills, trusts and beneficiary designations. Revocable deferred gifts are not capitalized on the university's financial statements. These numbers will not reconcile to the annual audited financial statements that use accounting standards.

### CHARITABLE GIFT RECEIPTS

Charitable gift receipts, also known as voluntary support, represent all gift income received in the form of cash, securities, in-kind contributions, irrevocable future commitments and private charitable grants. For the purposes of this report, deferred gifts are counted at present value. These national gift reporting standards are defined by the Council for Advancement and Support of Education and the National Association of College and University Business Officers. These standards are utilized in the annual Voluntary Support of Education survey. These numbers will not reconcile to the annual audited financial statements that use accounting standards.

### ENDOWMENT MARKET VALUE

The endowment market value includes assets held by both the university and its auxiliaries in all of the following categories:

#### TRUE ENDOWMENT

Funds provided to the institution, the principal of which is not expendable by the institution under the terms of the agreement that created the fund.

#### TERM ENDOWMENT

Similar to true endowment except that all or part of the funds may be expended after a stated period or upon the occurrence of a certain event as stated in the terms governing the funds.

#### QUASI-ENDOWMENT

Funds functioning as endowment the principal of which may be spent at the discretion of the governing board.

### GROUP I

Universities categorized within Group I generally have fewer than 5,000 individual donors, fewer than 10 full-time professional fundraisers and less than \$50 million in endowment market value. These advancement programs are building infrastructure and are striving toward raising gift commitments that are equivalent to 10 percent of the campus state budget.

### GROUP II

Universities categorized within Group II generally have between 5,000 and 10,000 individual donors, between 10 and 20 full-time professional fundraisers and between \$50 million and \$100 million in endowment market value. These advancement programs are maturing and are expected to raise gift commitments that are equivalent to 10 percent to 15 percent of the campus state budget.

### GROUP III

Universities categorized within Group III generally have more than 10,000 individual donors, more than 20 full-time professional fundraisers and over \$100 million in endowment market value. These more mature advancement programs have developed successful annual fund, major gift and planned giving operations complemented by strong alumni and communication programs. These programs are expected to raise gift commitments that are greater than 15 percent of the campus state budget.

### PLEDGES

Gift commitments paid in installments over a period of time, not to exceed five years. Pledges must be documented and are counted at face value.

### PURPOSE OF GIFT

Refers to the donor's expressed intention for the use of the gift.

#### UNRESTRICTED

Gifts given to the institution without any restriction, regardless of any subsequent designation by the institution.

#### RESTRICTED

Gifts that have been restricted to support academic divisions, athletics, faculty compensation, research, public service, library operations, physical plant maintenance, student financial aid or other restricted purposes.

#### PROPERTY, BUILDINGS AND EQUIPMENT (CAMPUS IMPROVEMENT)

Funds functioning as endowment, such as surplus funds that have been added to the endowment fund, the principal of which may be spent at the discretion of the governing board.

- Outright gifts of real and personal property for the use of the institution;
- Gifts made for the purpose of purchasing buildings, other facilities, equipment and land for the institution;
- Gifts restricted for construction or major renovation of buildings and other facilities; and
- Gifts made for retirement of indebtedness.

#### ENDOWMENT

Funds to be retained and invested for income-producing purposes. Donors may restrict the uses of the income produced or allow the institution discretion to make allocations.

### IRREVOCABLE DEFERRED GIFTS

Irrevocable commitments such as charitable gift annuities, charitable remainder trusts (including those administered outside the institution), gifts to pooled income funds, and remainder interests in property. These provisions are counted at market value.

### REVOCABLE DEFERRED GIFTS

This category includes new estate provisions made in a will, revocable trust or beneficiary designation for which the institution has documentation. These provisions are counted at face value.

### SOURCE OF GIFT

Sources of gifts are defined as those entities (individuals or organizations) that transmit the gift or grant to the institution.

### ALUMNI

Former undergraduate or graduate students who have earned some credit toward one of the degrees, certificates or diplomas offered by the institution for whom the university has a reasonable means of contacting. It is within the discretion of each university to limit alumni status to individuals who have obtained a degree and/or credential.

### PARENTS

These are individuals, other than alumni, who are the parents, guardians or grandparents of current or former students at the institution.

### OTHER INDIVIDUALS

This includes all other persons, including governing board members, who are not classified as either alumni or parent.

### FOUNDATIONS

Personal/family foundations and other foundations and trusts that are private tax-exempt entities operated exclusively for charitable purposes. It does not include company-sponsored foundations.

### CORPORATIONS

This category includes corporations, businesses, partnerships and cooperatives that have been organized for profit-making purposes, including corporations owned by individuals and families and other closely held companies. This category also includes company-sponsored foundations as well as industry trade associations.

### OTHER ORGANIZATIONS

Organizations not reported elsewhere, including religious and community organizations, fundraising consortia and any other nongovernmental agencies.





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