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COMMITTEE ON BUDGET AND RESOURCE ALLOCATION

23-24 COBRA 12

April 10, 2024

TO: The Academic Senate
FROM: Committee on Budget and Resource Allocation (COBRA)
SUBJECT: 23-24 COBRA 12: Advancement Update
PURPOSE: For Information to the Academic Senate

BACKGROUND INFORMATION:

Evelyn Buchanan Vice President for University Advancement came to COBRA to provide information on Advancement efforts on March 27th 2024.

ACTION REQUESTED:

For Information to the Academic Senate.

Presentation by Evelyn Buchanan Vice President University Advancement

Evelyn Buchanan, VP University Advancement joined the COBRA meeting on March 13th and provided an update on university advancement efforts. VP Buchanan provided a few slides and these are linked [here](#) and the relevant slide # referenced in the report.

VP Buchanan started by providing a broader budget context to the fund-raising work of Advancement by framing where Advancement sits in relation to its allocation of the university budget (see Slide#1). Currently, Advancement accounts for 1% of the total budget allocation approximately \$3.1M. In 23/24 like other units, there was a base reduction of \$120K to address the institution deficit. Reorganization in November 2023 saw Career Services moved to Advancement increasing its budget to about \$3.6M. Slide #2 shows how that allocation was distributed within the unit and Slide#3 provides an overview of how Advancement is organized and the number of staff within each service area that include, for example, communications, career services, management functions, alumni engagement as well as development and compliance. VP Buchanan noted that due to the hiring chill the staff numbers have been reduced in the last two years.

VP Buchanan next provided some key distinctions with respect to fund-raising (see Slide#4). There are ‘one-time’ dollars which are expendable funds and once spent are done versus ongoing funds that become part of a base budget. Funds can also be restricted in that, for example, the donor places restrictions on how the funds can be used or unrestricted where the funds can be used for any permissible activity. Funds can be provided one-time as ‘cash’ or there can be pledges that span multiple years. There can also be deferred funds, for example, estate gifts that are realized when a donor is deceased. A gift can be made as an endowment which is placed in an investment fund and where a portion (4% - set by the Educational Foundation Board of Trustees¹) of the fund can be disbursed each year.

In reporting fund-raising efforts, the funds are broken down into these categories. Slide#5 provides a breakdown of the total commitments for fiscal year 2024 to date that amount to over \$10M. This is expected to rise as there are still 4-months to go before the end of the current fiscal year which closes June 30th. The goal for FY2024 was \$10M so Advancement has met that goal and expects to exceed it. Slide#6 shows how the commitments will be used with \$3M going to current uses, \$4.2M to endowments, and \$3M to capital projects, primarily the Applied Science Center. Slide#7 provides a historic record of fund-raising for the last 10 years and shows the general growth in Advancement and on target for the second-best year in the past 10 years. The dip in 2022-2023 was explained by a combination of the fallout from the pandemic and losing several staff in the unit to the ‘great resignation’.

¹ The funds that can be disbursed from the endowment is reliant on how well the fund does in the money markets. Typically funds cannot be disbursed if it draws down the principal although recent legislation has eased this requirement.

A highlight of the current year was the CSU Board of Trustees approving the naming of the Applied Science Center as Braddock Center for Science and Innovation (See Slide#8) in honor of the Braddock family who were major donors. This is only the second building to VP Buchanan's understanding that's been named at East Bay – the first being the Valley Business and Technology Center. Also of note are gifts supporting student scholarships (see Slide#8): one for recruitment for incoming STEM students of \$200K that will incentivize students to come to East Bay with awards ranging from \$2,500 - \$5,000; and a second, which has been around for about 11 years, designed to get graduating students to complete (Finish Line Scholarship). The former is for immediate use and is the donors first gift to the university and the latter is in the form of a \$500K endowment. In addition to ongoing work to identify new donors and maintain existing donor relations, Advancement coordinates an annual giving program (see Slide#10) and a specific date was set this year. Surpassing expectations, this raised about \$120K from 263 gifts. The plan is to repeat this in 2025.

VP Buchanan next spoke about the work underway in Communications and Marketing around the rebranding of the university (see Slide#11). This rebranding has been presented in several forums already for comment and will be presented to the Academic Senate in a couple of weeks. VP Buchanan explained the importance of leveraging the power of a strong brand which can be used to create digital enrollment marketing campaigns that are more targeted, more engaging, and ultimately more successful in attracting qualified applicants (see Slide#12). The Communications and Marketing team have worked with enrollment management on a digital enrollment marketing campaign that ran from last fall until recently to drive potential applicants to our website with a very clear call to action. Branding also can help with building a sense of alumni pride as we look to reconnect and engage with alumni and have them become our next generation of donors. The plan is to launch the new brand at the start of the fall 2024 semester and Advancement will be providing a style guide and toolkits, and training.

Lastly, VP Buchanan spoke about the career empowerment center (see Slide#13). The career center was moved to Advancement in November 2023 to tap into synergies between employers, alumni, and current students. A particular focus is on alumni engagement and to create opportunities for students through internships and job opportunities on graduation. A new Director for the Center has been hired, Clark Boothby. One of the top priorities is in the near term is to ascertain where our students find employment on graduation and a standard first destination survey used across higher education will be launched in April 2024. The Career Center also wishes to identify faculty champions who are embedding career education in their curriculum as well as forming a cadre of peer coaches especially around the skills key to securing employment. Lastly, exploring how technology platforms can be used to scale up operations given the small size of the team – the team is never going to be big enough to be able to work one-on-one with every student. Research has shown that cultivating these opportunities improves retention and graduation and graduates report greater satisfaction potentially creating future donors.

