

Philanthropy

2013/2014 PHILANTHROPIC SUPPORT ANNUAL REPORT





A MESSAGE FROM THE CHANCELLOR

The California State University is an agent of economic prosperity, civic responsibility and social mobility for the nation's most populous state. The CSU is a community of half a million students, faculty, and staff with 3 million living alumni joined by a shared mission of opportunity, quality and success. This vital mission uplifts people, communities, states and nations.

Philanthropic support sustains the high margin of excellence within the CSU. The university gains from its affiliation with industry and community leaders, partnerships with foundations, and continuing connection with alumni. The university is enriched, both in the resources to fulfill its mission and the experience that donors bring as mentors and partners.

The stories of donors speak to the same conviction and perseverance I see in CSU students. It is that drive that seeks opportunity in adversity to create something new for this world. It is our CSU story and it is California's story.

My deepest gratitude goes to those who continue to be part of our story by investing in a better future for our students, our employees, our campuses and communities, and ultimately for us all.

Timothy P. White
Chancellor



The California State University Trustees' Award for Outstanding Achievement is the system's highest honor recognizing superior academic performance, exceptional community service, and personal achievement.

Top Row: David Elliott, San José State; Gregory Worstell, California Maritime Academy; Patrick Landrum, Sacramento State; Jesus Ochoa Perez, CSU Monterey Bay; Gena Alltizer, CSU San Bernardino; Sergio Juarez, San Diego State; Pamela Hernandez, CSU Dominguez Hills; Bryan L.L. Wood, Fresno State; and Giovanni Lamanna, Sonoma State.

Front Row: Shayle Matsuda, San Francisco State; Lita Melissa Cahuana, CSU Long Beach; Natalie Rivera, Cal Poly Pomona; Natalie Holmberg-Douglas, CSU Chico; Mayra Roxi Diaz, CSU Northridge; Monica R. Correale, Humboldt State; Faith Ithem, CSU Bakersfield; Carlos Betancourt, CSU San Marcos; Teresa Castillo, CSU Channel Islands; Jessica Mery, CSU East Bay; Michelle Lam, Cal Poly San Luis Obispo; Michael Chacon, CSU Fullerton; Eliza Matley, CSU Stanislaus; and Justin D'Agostino, CSU Los Angeles.

The online report at www.calstate.edu/philanthropic includes graphs and highlights for the 23 CSU campuses.

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As California's greatest producer of bachelor's degrees, the California State University plays a critical role in equipping future leaders with the skills and knowledge necessary to thrive in the workforce, drive California's economy, and give back to their communities. Through superior teaching by distinguished faculty, comprehensive industry partnerships, and robust applied learning, the CSU is expanding programs, internships, and workforce opportunities to ensure students are prepared for a lifetime of career advancement and civic engagement.

OPPORTUNITY Philanthropic support opens the door of opportunity for many talented students by providing \$43 million in private scholarship support. When combined with state and federal student aid, nearly 76 percent of the CSU's 447,000 students receive assistance for their education expenses. Further, CSU graduates enter the workforce carrying considerably less student debt than state and national averages.

QUALITY The high-quality education students experience is enhanced by partnerships with corporations and foundations supporting high impact learning. These practices include community engagement, study abroad, peer mentoring, internships, and undergraduate research. The hands-on approach engages students in problem solving and teamwork that contextualizes the curriculum and deepens its value. Preliminary research indicates that students who participate in at least two high impact learning opportunities are more likely to complete their degree and do so in a timely manner.

SUCCESS Whether through scholarship or program support, donors are making a significant difference in student success and degree completion. More than 100,000 students graduate into the ranks of CSU's proud alumni each year. Now 3 million strong, the CSU's alumni are entrepreneurs, artists, astronauts, business leaders, engineers, health care experts and public service professionals touching every part of life. Impressively, one in 10 employees in California is a CSU graduate.

The impact of philanthropy at the CSU is both meaningful to the student who otherwise might not be able to attend the university and to the social and economic prosperity of California's communities.

INVESTING IN THE FUTURE



The Leona M. and Harry B. Helmsley Charitable Trust awarded \$4.6 million to study the effect of high impact learning and other curricular interventions in improving California's degree production in the Science, Technology, Engineering and Mathematics (STEM) fields.



"Intellectual growth is a pursuit that enables my ability to achieve occupational and personal success."
Faith Ihem,
CSU Bakersfield

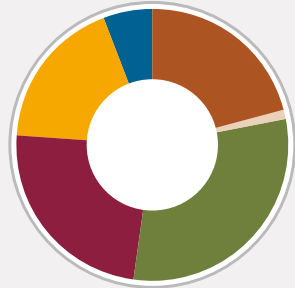
\$43 MILLION
SCHOLARSHIPS



GIFT COMMITMENTS
\$457 MILLION

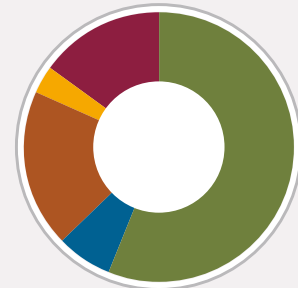
GIFT RECEIPTS
\$295 MILLION

CHARITABLE GIFTS BY SOURCE OF GIFT



| | |
|---------------------|--------|
| Alumni | 20.84% |
| Parents | 1.27% |
| Other Individuals | 30.21% |
| Foundations | 24.05% |
| Corporations | 18.00% |
| Other Organizations | 5.63% |

CHARITABLE GIFTS BY GIFT PURPOSE



| | |
|---------------------|--------|
| Current Programs | 56.16% |
| Campus Improvements | 6.68% |
| Endowment | 18.95% |
| Unrestricted | 3.42% |
| Other | 14.79% |

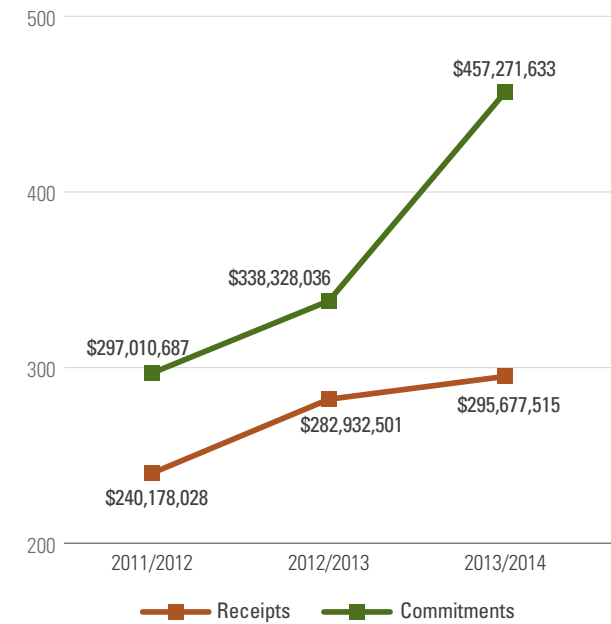
SETTING NEW RECORDS



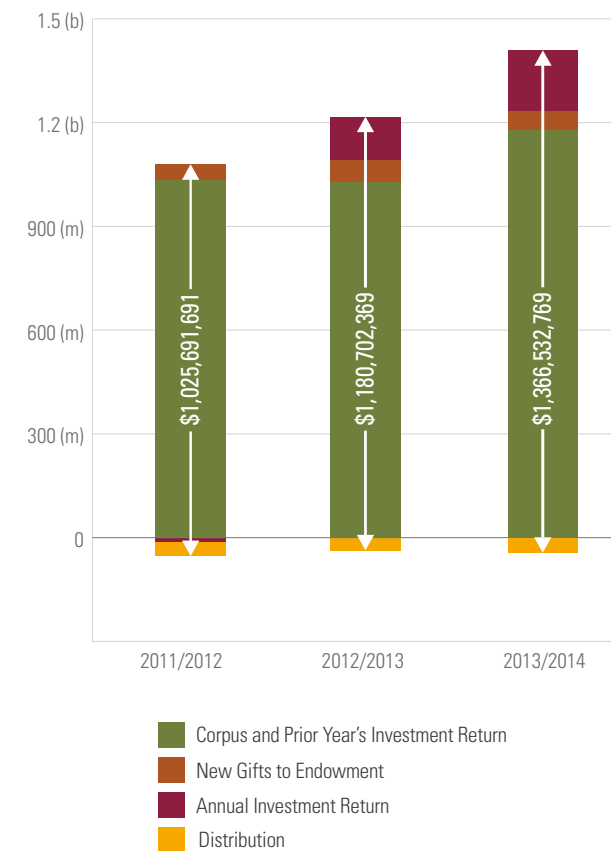
"These gifts are investments in the future of our state and ensure that students can receive a high-quality and transformative education that prepares them to meet California's economic and societal needs."

Garrett P. Ashley
Vice Chancellor of University Relations and Advancement

Gift Commitments & Gift Receipts A three-Year History



Endowment Market Value



Donors committed a record-breaking \$457.3 million in charitable gifts to California State University campuses in 2013/2014—an increase of 35 percent from the previous year. This marks the third consecutive year the university has seen increases in philanthropic support. There is no greater testament to the university than the donor's belief in the CSU's value and its impact.

SUSTAINABLE

More good news came from the endowment, with market value topping \$1.3 billion for the first time. Endowments distributed \$43.8 million to support scholarships, research activities and programs. New gifts to endowment exceeded \$56 million, providing more sustainable support into the future.

IMMEDIATE

More than half of all gifts received serve the immediate needs of today's students. They provide access to a broad and diverse student population, facilitate innovative teaching models and partnerships, and enhance the learning experience. The CSU received more than \$166 million in support for these efforts:

- \$18.9 million for student scholarships
- \$44.2 million for academic enrichment
- \$9.9 million for research
- \$30.6 million for public service programs
- \$17.7 million for athletics
- \$44.7 million for other designated priorities

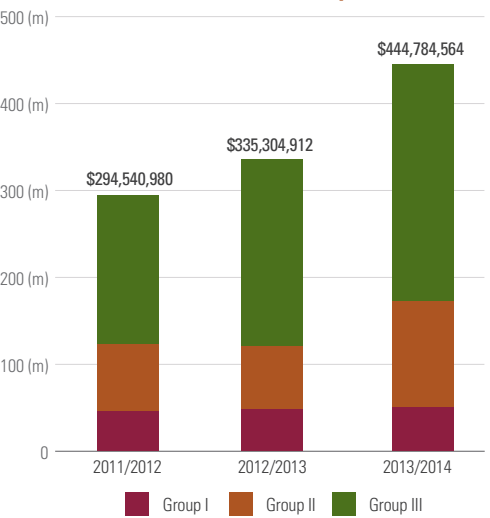
Unrestricted support of \$10.1 million represents 3.4 percent of all gifts received, and is available for high priority needs. Additionally, campuses received \$19.7 million in property and capital improvement gifts for facilities and equipment.





BENCHMARKING SUCCESS

Three-Year History of Charitable Gift Commitments by Peer Group



Campus philanthropic performance is benchmarked within peer groups of similar size and capacity. Year over year performance advanced in each of the three peer groups. Nearly 60 percent of all gift commitments are attributed to the five campuses in Group III with the most mature development programs: Fresno State, CSU Long Beach, San Diego State, San José State and Cal Poly San Luis Obispo.

Charitable Gift Commitments as a Percentage of the State Funded Budget

| | 2011/2012 | 2012/2013 | 2013/2014 | |
|---|-----------------|-----------------|-----------------|------------------|
| Gift Commitments¹ | \$297,010,687 | \$338,328,036 | \$457,271,633 | |
| State Budget | \$1,936,822,538 | \$1,825,646,737 | \$2,075,283,433 | |
| Total Gift Commitments as a Percentage of State Budget | 15% | 19% | 22% | |
| | | | | Benchmark |
| Group I Average | 7% | 8% | 8% | <10% |
| Group II Average | 11% | 11% | 16% | 10-15% |
| Group III Average | 31% | 41% | 45% | >15% |

Note 1: Includes Chancellor's Office.



Endowment Investment Performance

| Investment Pool Asset Range | #CSU | CSU Average Investment Return |
|-----------------------------|------|-------------------------------|
| >\$100 M | 4 | 15.43% |
| >\$50 M to ≤\$100 M | 6 | 14.15% |
| >\$25 M to ≤\$50 M | 4 | 13.08% |
| ≤\$25 M ¹ | 10 | 15.83% |

The average university endowment investment return for 2013/2014 was 15.8 percent according to the National Association of College and University Business Officers/Commonfund Endowment Study. Investment returns are presented net of fees.

Note 1: Includes Chancellor's Office



TRANSFORMING EDUCATION

California State University prepares most of the state's teaching force and is committed to transforming education. Partnering with the James Irvine Foundation and the S. D. Bechtel, Jr. Foundation, the CSU is working to prepare new educators to teach in career pathways with integrated curriculum and project-based learning.

"I was always under the impression it was going to be difficult for me to make students intrinsically motivated," said Rene Gutierrez, who is seeking a credential in history from Fresno State. "I found that when you make content relevant or make it so they can see the purpose of learning, they become motivated on the ground."

PROTECTING OUR COAST

The Moss Landing Marine Laboratories opened a new facility in August 2014 to study aquaculture. Worldwide farming of aquatic organisms is on the rise and thoughtful management of this resource is resulting in industry growth. The David and Lucile Packard Foundation provided significant funding to construct the 1,200-square-foot laboratory.

Research is also being conducted on climate change. Professor of Marine Biogeochemistry Kenneth H. Coale has been named a Fellow of the American Association for the Advancement of Science for groundbreaking experiments linking iron to plankton growth, marine production and climate change. **"It is truly an honor for our little institution in Moss Landing to be recognized by such a prominent and respected scientific body,"** Coale said.

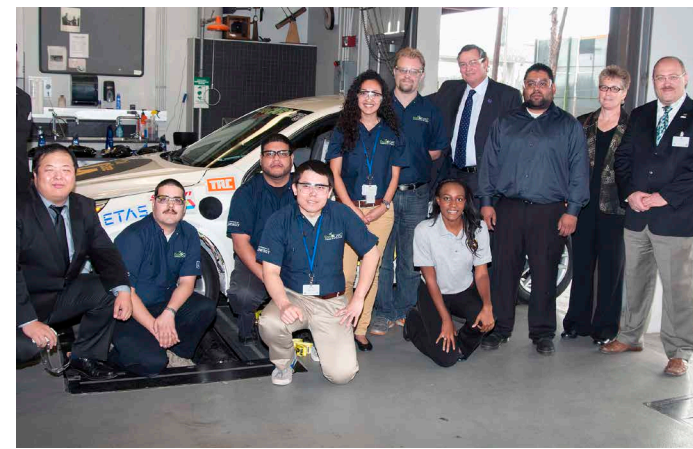
ADVANCING TECHNOLOGY

Students from Cal State Los Angeles are participating in a three-year collegiate EcoCAR 2: Plugging into the Future competition. EcoCAR 2 is sponsored by General Motors and the U.S. Department of Energy. The competition challenges 15 teams of engineering and business students to design and build advanced vehicles that demonstrate cutting-edge automotive technologies. CSULA received a 2013 Chevrolet Malibu, and is now working to reduce the environmental impact of the already fuel-efficient Malibu through an integration platform it developed that is designed to not compromise its performance, safety or consumer acceptability.

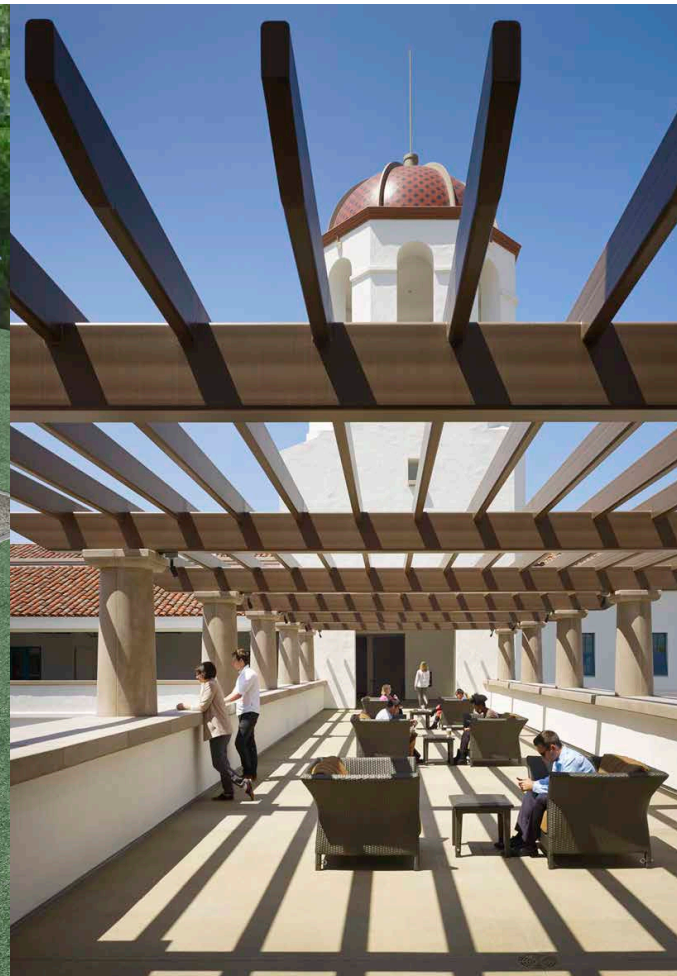
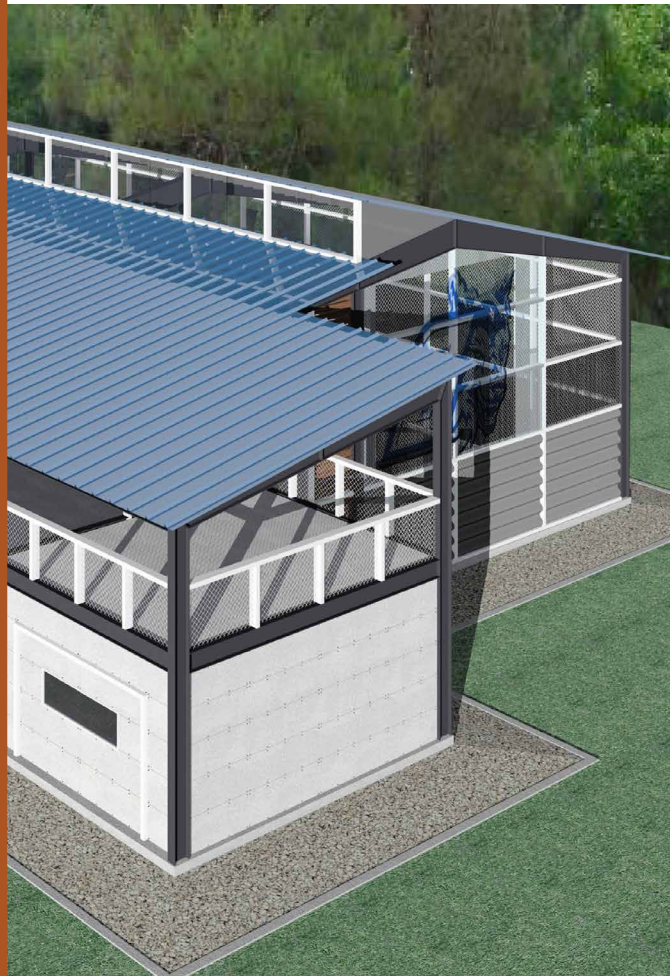
The EcoCAR 2 team has partnered with the Los Angeles Cleantech Incubator for mentorship, internships and network access. **"We look forward to working with Ian Harris, director of operations and communications at Cleantech Incubator,"** said Abraham Vargas, business manager of the EcoCar 2 team. **"Having a set of critical eyes on our work with the industry experience that Mr. Harris possesses is very important in this competition."**

ADDRESSING COMMUNITY ISSUES

With the help of philanthropy, California State University is addressing the state's most pressing issues including improving K-12 schools, protecting California's marine and coastal life, and advancing technology.



California State University Board of Trustees recognized leadership gifts by naming the following academic programs and facilities in 2013/2014.



RECOGNIZING LEADING GIFTS

GORDON SMITH TRAINING CENTER, SONOMA STATE

A former major league baseball player, Gordon M. Smith was a long-time supporter of the Sonoma State University baseball program and a volunteer assistant coach for the Sonoma State University, San José State University and San Francisco State University baseball teams. His \$1.25 million bequest funded construction of a new baseball training center including batting cages, pitcher's mounds, a team locker room, coaches' offices and equipment storage areas.

CONRAD PREBYS AZTEC STUDENT UNION, SAN DIEGO STATE

A \$20 million contribution by Conrad Prebys benefits students through scholarship support in seven specific areas: creative and performing arts, biomedical research, student leaders, veterans, former foster youth, honor scholars and entrepreneurs. On an annual basis, a minimum of 150 students will receive scholarships. In 2013, Business Insider named Mr. Prebys one of the 25 Most Generous People in America.

DAVID NAZARIAN COLLEGE OF BUSINESS AND ECONOMICS, CSU NORTHRIDGE

Business leader David Nazarian is an alumnus of CSU Northridge with a bachelor's degree in Business Administration. His \$10 million contribution will support strategic initiatives and priorities of the college. In addition, Mr. Nazarian is committed to helping raise another \$15 million in the next three to five years for the college. This gift will enable CSU Northridge to be a leader in delivering world-class business education to students throughout Southern California.

MARGIE WRIGHT DIAMOND, FRESNO STATE

Retired coach Margie Wright is the NCAA Division I all-time winningest softball coach and is ranked second all-time in NCAA Division I history for victories regardless of sport. As a U.S. Olympic coach and 15-time hall of famer, Coach Wright amassed 1,457 career wins in 33 years while leading the Bulldogs to 1,294 victories in 27 seasons. Gifts made in tribute to her legacy recognize Coach Wright's commitment to student-athletes.

PHILANTHROPIC PRODUCTIVITY

2013/2014 Fiscal Year

Chart I

| | 2011/2012 Total Gift Commitments | 2012/2013 Total Gift Commitments | 2013/2014 Total Gift Commitments | Three Year Average | 2011/2012 Total Gift Receipts | 2012/2013 Total Gift Receipts | 2013/2014 Total Gift Receipts | Three Year Average |
|-----------------------------|--|--|--|-----------------------|-------------------------------------|-------------------------------------|-------------------------------------|-----------------------|
| GROUP I | | | | | | | | |
| Bakersfield | \$2,645,739 | \$5,267,573 | \$7,336,831 | \$5,083,381 | \$2,918,869 | \$4,901,434 | \$5,698,327 | \$4,506,210 |
| Channel Islands | \$2,014,940 | \$3,032,596 | \$5,816,162 | \$3,621,233 | \$2,648,451 | \$2,423,029 | \$1,766,331 | \$2,279,270 |
| Dominguez Hills | \$4,122,003 | \$3,889,594 | \$1,709,956 | \$3,240,518 | \$3,274,284 | \$3,322,219 | \$1,534,793 | \$2,710,432 |
| East Bay | \$5,192,515 | \$4,577,250 | \$2,541,365 | \$4,103,710 | \$3,079,080 | \$2,954,823 | \$3,431,059 | \$3,154,987 |
| Humboldt | \$7,535,171 | \$7,095,256 | \$8,613,633 | \$7,748,020 | \$5,709,064 | \$5,550,024 | \$7,652,638 | \$6,303,909 |
| Los Angeles | \$5,985,996 | \$5,306,456 | \$5,325,416 | \$5,539,289 | \$3,141,720 | \$4,405,804 | \$6,020,531 | \$4,522,685 |
| Maritime Academy | \$1,596,985 | \$2,588,723 | \$2,755,384 | \$2,313,697 | \$1,990,331 | \$2,582,267 | \$2,425,938 | \$2,332,845 |
| Monterey Bay | \$5,768,245 | \$4,207,401 | \$4,052,582 | \$4,676,076 | \$6,113,039 | \$4,267,270 | \$3,494,035 | \$4,624,781 |
| San Bernardino | \$4,031,363 | \$4,225,518 | \$5,914,228 | \$4,723,703 | \$3,133,509 | \$2,429,411 | \$4,265,523 | \$3,276,148 |
| San Marcos | \$4,213,983 | \$5,114,764 | \$5,679,175 | \$5,002,641 | \$2,282,904 | \$4,660,321 | \$3,685,210 | \$3,542,812 |
| Stanislaus | \$2,358,933 | \$2,166,357 | \$1,010,541 | \$1,845,277 | \$1,882,501 | \$2,695,965 | \$1,312,194 | \$1,963,553 |
| PEER GROUP I TOTAL | \$45,465,873 | \$47,471,488 | \$50,755,273 | \$47,897,545 | \$36,173,752 | \$40,192,567 | \$41,286,579 | \$39,217,633 |
| GROUP II | | | | | | | | |
| Chico | \$7,564,497 | \$8,871,183 | \$9,548,488 | \$8,661,389 | \$4,299,497 | \$5,615,932 | \$7,385,863 | \$5,767,097 |
| Fullerton | \$7,294,986 | \$8,576,136 | \$16,027,456 | \$10,632,859 | \$9,930,554 | \$12,888,898 | \$10,117,018 | \$10,978,823 |
| Northridge | \$11,399,521 | \$14,793,755 | \$21,511,163 | \$15,901,480 | \$8,975,525 | \$13,327,290 | \$13,269,224 | \$11,857,346 |
| Pomona | \$10,744,565 | \$10,164,473 | \$34,828,837 | \$18,579,292 | \$16,435,369 | \$19,629,243 | \$20,095,525 | \$18,720,046 |
| Sacramento | \$11,162,488 | \$10,212,592 | \$14,236,085 | \$11,870,388 | \$7,803,312 | \$8,195,635 | \$9,776,432 | \$8,591,793 |
| San Francisco | \$17,016,911 | \$15,378,536 | \$14,338,699 | \$15,578,049 | \$9,755,271 | \$10,075,551 | \$11,358,876 | \$10,396,566 |
| Sonoma | \$12,384,760 | \$5,537,811 | \$11,037,607 | \$9,653,393 | \$14,125,513 | \$7,627,102 | \$7,454,412 | \$9,735,676 |
| PEER GROUP II TOTAL | \$77,567,728 | \$73,534,486 | \$121,528,335 | \$90,876,850 | \$71,325,041 | \$77,359,651 | \$79,457,350 | \$76,047,347 |
| GROUP III | | | | | | | | |
| Fresno | \$24,672,230 | \$24,969,668 | \$66,663,487 | \$38,768,462 | \$13,222,664 | \$19,820,116 | \$17,189,360 | \$16,744,047 |
| Long Beach | \$27,736,945 | \$27,013,759 | \$28,543,157 | \$27,764,620 | \$18,132,857 | \$13,680,347 | \$14,633,860 | \$15,482,355 |
| San Diego | \$67,052,356 | \$83,909,499 | \$96,752,543 | \$82,571,466 | \$66,823,751 | \$77,564,826 | \$88,547,598 | \$77,645,392 |
| San José | \$24,873,168 | \$35,852,274 | \$31,373,175 | \$30,699,539 | \$14,259,028 | \$33,362,138 | \$30,225,418 | \$25,948,861 |
| San Luis Obispo | \$27,172,680 | \$42,553,738 | \$49,168,594 | \$39,631,671 | \$18,471,478 | \$17,736,357 | \$19,528,931 | \$18,578,922 |
| PEER GROUP III TOTAL | \$171,507,379 | \$214,298,938 | \$272,500,956 | \$219,435,758 | \$130,909,778 | \$162,163,784 | \$170,125,167 | \$154,399,576 |
| Chancellor's Office | \$2,469,707 | \$3,023,124 | \$12,487,069 | \$5,993,300 | \$1,769,457 | \$3,216,499 | \$4,808,419 | \$3,264,792 |
| SYSTEMWIDE TOTAL | \$297,010,687 | \$338,328,036 | \$457,271,633 | \$364,203,452 | \$240,178,028 | \$282,932,501 | \$295,677,515 | \$272,929,348 |

Note 1: Gift Commitments include new gifts, new pledges and testamentary commitments. Gift Receipts reflect assets received by the University in the form of new gifts and pledge payments.

CHARITABLE GIFT COMMITMENTS

2013/2014 Fiscal Year

Chart II

| | New Charitable Gifts | New Pledges | Testamentary Commitments | Native American & Government Contributions | Total Gift Commitments |
|-----------------------------|----------------------------|----------------------|-----------------------------|---|------------------------------|
| GROUP I | | | | | |
| Bakersfield | \$5,237,238 | \$2,099,593 | \$0 | \$0 | \$7,336,831 |
| Channel Islands | \$1,349,520 | \$453,791 | \$3,870,000 | \$142,851 | \$5,816,162 |
| Dominguez Hills | \$1,043,524 | \$128,910 | \$0 | \$537,522 | \$1,709,956 |
| East Bay | \$1,412,752 | \$1,108,613 | \$20,000 | \$0 | \$2,541,365 |
| Humboldt | \$5,026,238 | \$3,473,670 | \$25,000 | \$88,725 | \$8,613,633 |
| Los Angeles | \$4,026,773 | \$747,643 | \$551,000 | \$0 | \$5,325,416 |
| Maritime Academy | \$2,372,663 | \$7,721 | \$375,000 | \$0 | \$2,755,384 |
| Monterey Bay | \$3,119,931 | \$852,116 | \$80,000 | \$535 | \$4,052,582 |
| San Bernardino | \$3,830,063 | \$786,765 | \$932,415 | \$364,985 | \$5,914,228 |
| San Marcos | \$2,920,210 | \$953,715 | \$1,500,000 | \$305,250 | \$5,679,175 |
| Stanislaus | \$881,541 | \$79,000 | \$50,000 | \$0 | \$1,010,541 |
| PEER GROUP I TOTAL | \$31,220,453 | \$10,691,537 | \$7,403,415 | \$1,439,868 | \$50,755,273 |
| GROUP II | | | | | |
| Chico | \$5,002,264 | \$183,647 | \$4,362,577 | \$0 | \$9,548,488 |
| Fullerton | \$9,111,338 | \$2,481,118 | \$4,435,000 | \$0 | \$16,027,456 |
| Northridge | \$9,996,368 | \$8,978,001 | \$2,536,794 | \$0 | \$21,511,163 |
| Pomona | \$7,972,028 | \$1,253,509 | \$25,603,300 | \$0 | \$34,828,837 |
| Sacramento | \$7,705,585 | \$1,222,500 | \$5,308,000 | \$0 | \$14,236,085 |
| San Francisco | \$7,499,219 | \$5,819,479 | \$1,020,001 | \$0 | \$14,338,699 |
| Sonoma | \$6,564,027 | \$2,580,000 | \$1,887,250 | \$6,330 | \$11,037,607 |
| PEER GROUP II TOTAL | \$53,850,829 | \$22,518,254 | \$45,152,922 | \$6,330 | \$121,528,335 |
| GROUP III | | | | | |
| Fresno | \$11,049,459 | \$51,491,600 | \$3,539,350 | \$583,078 | \$66,663,487 |
| Long Beach | \$10,473,326 | \$4,904,901 | \$13,164,930 | \$0 | \$28,543,157 |
| San Diego | \$80,555,366 | \$9,495,641 | \$6,686,536 | \$15,000 | \$96,752,543 |
| San José | \$18,043,843 | \$3,464,332 | \$9,865,000 | \$0 | \$31,373,175 |
| San Luis Obispo | \$16,887,169 | \$9,181,425 | \$23,100,000 | \$0 | \$49,168,594 |
| PEER GROUP III TOTAL | \$137,009,163 | \$78,537,899 | \$56,355,816 | \$598,078 | \$272,500,956 |
| Chancellor's Office | \$4,248,419 | \$8,238,650 | \$0 | \$0 | \$12,487,069 |
| SYSTEMWIDE TOTAL | \$226,328,864 | \$119,986,340 | \$108,912,153 | \$2,044,276 | \$457,271,633 |

Note 1: Group I campuses generally have less than 5,000 individual donors, less than 10 full-time professional fundraisers, and less than \$25 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 \$25 million and \$50 million in endowment market value. Group III campuses generally have over 10,000 individual donors, over 20 full-time professional fundraisers, and over \$50 million in endowment market value.

GIFT RECEIPTS BY SOURCE

2013/2014 Fiscal Year Chart III

| | Individuals | | | Organizations | | | Gift Receipts Total | Total Number Individual Donors |
|-----------------------------|---------------------|--------------------|---------------------|---------------------|---------------------|---------------------|----------------------|--------------------------------|
| | Alumni | Parents | Other Individuals | Foundations | Corporations | Other Organizations | | |
| GROUP I | | | | | | | | |
| Bakersfield | \$226,707 | \$1,215 | \$939,259 | \$1,037,398 | \$3,178,908 | \$314,840 | \$5,698,327 | 706 |
| Channel Islands | \$21,967 | \$16,288 | \$403,749 | \$399,887 | \$873,778 | \$50,662 | \$1,766,331 | 1,070 |
| Dominguez Hills | \$100,650 | \$2,135 | \$170,899 | \$497,235 | \$650,060 | \$113,814 | \$1,534,793 | 1,478 |
| East Bay | \$365,379 | \$9,785 | \$604,314 | \$673,836 | \$1,643,685 | \$134,060 | \$3,431,059 | 1,281 |
| Humboldt | \$1,371,471 | \$133,662 | \$1,617,707 | \$2,026,754 | \$1,708,179 | \$794,865 | \$7,652,638 | 7,563 |
| Los Angeles | \$1,625,665 | \$5,950 | \$2,255,108 | \$559,108 | \$1,328,453 | \$246,247 | \$6,020,531 | 3,072 |
| Maritime Academy | \$116,819 | \$17,437 | \$1,835,812 | \$40,295 | \$205,628 | \$209,947 | \$2,425,938 | 314 |
| Monterey Bay | \$40,416 | \$31,956 | \$1,524,030 | \$848,290 | \$387,302 | \$662,041 | \$3,494,035 | 6,257 |
| San Bernardino | \$232,702 | \$32,334 | \$1,115,143 | \$1,182,373 | \$1,478,078 | \$224,893 | \$4,265,523 | 2,801 |
| San Marcos | \$64,361 | \$33,951 | \$696,561 | \$1,780,464 | \$750,724 | \$359,148 | \$3,685,210 | 1,308 |
| Stanislaus | \$105,155 | \$1,725 | \$377,766 | \$24,597 | \$726,967 | \$75,984 | \$1,312,194 | 751 |
| PEER GROUP I TOTAL | \$4,271,292 | \$286,438 | \$11,540,348 | \$9,070,237 | \$12,931,762 | \$3,186,501 | \$41,286,579 | 26,601 |
| GROUP II | | | | | | | | |
| Chico | \$1,739,411 | \$382,840 | \$1,003,481 | \$437,373 | \$3,625,717 | \$197,041 | \$7,385,863 | 11,500 |
| Fullerton | \$1,426,854 | \$269,522 | \$1,088,586 | \$3,896,912 | \$3,001,852 | \$433,292 | \$10,117,018 | 7,959 |
| Northridge | \$2,044,613 | \$133,624 | \$1,490,489 | \$5,802,252 | \$2,572,753 | \$1,225,493 | \$13,269,224 | 8,375 |
| Pomona | \$2,095,579 | \$70,690 | \$3,667,493 | \$10,195,226 | \$1,766,057 | \$2,300,480 | \$20,095,525 | 5,091 |
| Sacramento | \$1,228,669 | \$11,134 | \$6,373,524 | \$880,480 | \$1,025,672 | \$256,953 | \$9,776,432 | 36,661 |
| San Francisco | \$2,498,308 | \$82,229 | \$2,094,699 | \$2,886,747 | \$2,841,954 | \$954,939 | \$11,358,876 | 6,936 |
| Sonoma | \$261,024 | \$27,647 | \$3,981,119 | \$1,198,365 | \$1,691,122 | \$295,135 | \$7,454,412 | 1,686 |
| PEER GROUP II TOTAL | \$11,294,458 | \$977,686 | \$19,699,391 | \$25,297,355 | \$16,525,127 | \$5,663,333 | \$79,457,350 | 78,208 |
| GROUP III | | | | | | | | |
| Fresno | \$6,264,199 | \$62,596 | \$3,154,869 | \$3,292,264 | \$4,341,660 | \$73,772 | \$17,189,360 | 9,347 |
| Long Beach | \$3,210,192 | \$464,448 | \$4,307,218 | \$2,429,149 | \$3,377,239 | \$845,614 | \$14,633,860 | 21,900 |
| San Diego | \$14,167,107 | \$591,801 | \$43,175,456 | \$20,532,987 | \$5,804,417 | \$4,275,830 | \$88,547,598 | 64,393 |
| San José | \$17,542,860 | \$58,611 | \$4,421,270 | \$4,709,097 | \$3,401,350 | \$92,230 | \$30,225,418 | 8,702 |
| San Luis Obispo | \$4,861,023 | \$1,305,638 | \$2,810,065 | \$1,661,229 | \$6,416,289 | \$2,474,687 | \$19,528,931 | 12,091 |
| PEER GROUP III TOTAL | \$46,045,381 | \$2,483,094 | \$57,868,878 | \$32,624,726 | \$23,340,955 | \$7,762,133 | \$170,125,167 | 116,433 |
| Chancellor's Office | \$0 | \$0 | \$220,273 | \$4,124,166 | \$435,898 | \$28,082 | \$4,808,419 | 114 |
| SYSTEMWIDE TOTAL | \$61,611,131 | \$3,747,218 | \$89,328,890 | \$71,116,484 | \$53,233,742 | \$16,640,049 | \$295,677,515 | 221,356 |

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

GIFT RECEIPTS BY PURPOSE

2013/2014 Fiscal Year Chart IV

| | Current Programs | | Campus Improvements: Property, Buildings and Equipment | Capital Purposes | | Deferred Gifts | Gift Receipts Total |
|-----------------------------|---------------------|----------------------|--|--------------------|---------------------|---------------------|----------------------|
| | Unrestricted | Restricted | | Unrestricted | Restricted | | |
| GROUP I | | | | | | | |
| Bakersfield | \$71,019 | \$3,964,568 | \$1,125,109 | \$0 | \$537,631 | \$0 | \$5,698,327 |
| Channel Islands | \$444,583 | \$1,237,148 | \$4,500 | \$0 | \$80,600 | \$0 | \$1,766,331 |
| Dominguez Hills | \$100,612 | \$1,071,491 | \$0 | \$0 | \$362,690 | \$0 | \$1,534,793 |
| East Bay | \$54,752 | \$2,803,408 | \$0 | \$0 | \$572,899 | \$0 | \$3,431,059 |
| Humboldt | \$354,263 | \$6,084,689 | \$8,887 | \$0 | \$686,107 | \$518,692 | \$7,652,638 |
| Los Angeles | \$354,692 | \$2,016,918 | \$202,182 | \$0 | \$3,446,739 | \$0 | \$6,020,531 |
| Maritime Academy | \$1,349,675 | \$453,986 | \$0 | \$0 | \$622,277 | \$0 | \$2,425,938 |
| Monterey Bay | \$66,038 | \$2,925,205 | \$3,657 | \$0 | \$188,711 | \$310,424 | \$3,494,035 |
| San Bernardino | \$25,716 | \$2,842,288 | \$821,991 | \$0 | \$575,528 | \$0 | \$4,265,523 |
| San Marcos | \$117,802 | \$2,947,798 | \$434,414 | \$0 | \$185,196 | \$0 | \$3,685,210 |
| Stanislaus | \$2,860 | \$1,263,215 | \$0 | \$0 | \$46,119 | \$0 | \$1,312,194 |
| PEER GROUP I TOTAL | \$2,942,012 | \$27,610,714 | \$2,600,740 | \$0 | \$7,304,497 | \$829,116 | \$41,286,579 |
| GROUP II | | | | | | | |
| Chico | \$280,745 | \$3,862,006 | \$50,000 | \$5,095 | \$2,938,017 | \$250,000 | \$7,385,863 |
| Fullerton | \$136,711 | \$6,250,904 | \$176,980 | \$0 | \$3,476,358 | \$76,065 | \$10,117,018 |
| Northridge | \$127,459 | \$7,837,174 | \$484,518 | \$0 | \$4,820,073 | \$0 | \$13,269,224 |
| Pomona | \$3,954,350 | \$4,241,793 | \$3,329,883 | \$0 | \$8,569,499 | \$0 | \$20,095,525 |
| Sacramento | \$146,511 | \$7,009,876 | \$560,680 | \$0 | \$2,059,365 | \$0 | \$9,776,432 |
| San Francisco | \$383,116 | \$5,907,092 | \$941,430 | \$1,216,991 | \$2,885,247 | \$25,000 | \$11,358,876 |
| Sonoma | \$216,386 | \$4,264,900 | \$2,363,502 | \$0 | \$509,624 | \$100,000 | \$7,454,412 |
| PEER GROUP II TOTAL | \$5,245,278 | \$39,373,745 | \$7,906,993 | \$1,222,086 | \$25,258,183 | \$451,065 | \$79,457,350 |
| GROUP III | | | | | | | |
| Fresno | \$75,625 | \$10,558,259 | \$1,054,656 | \$65,000 | \$5,435,820 | \$0 | \$17,189,360 |
| Long Beach | \$763,785 | \$10,297,100 | \$1,095,142 | \$0 | \$1,627,833 | \$850,000 | \$14,633,860 |
| San Diego | \$39,860 | \$44,574,933 | \$4,959,529 | \$0 | \$7,140,506 | \$31,832,770 | \$88,547,598 |
| San Jose | \$432,057 | \$17,368,706 | \$23,665 | \$0 | \$3,146,855 | \$9,254,135 | \$30,225,418 |
| San Luis Obispo | \$485,826 | \$11,762,733 | \$2,103,708 | \$0 | \$4,675,648 | \$501,016 | \$19,528,931 |
| PEER GROUP III TOTAL | \$1,797,153 | \$94,561,731 | \$9,236,700 | \$65,000 | \$22,026,662 | \$42,437,921 | \$170,125,167 |
| Chancellor's Office | \$130,282 | \$4,520,122 | \$0 | \$0 | \$158,015 | \$0 | \$4,808,419 |
| SYSTEMWIDE TOTAL | \$10,114,725 | \$166,066,312 | \$19,744,433 | \$1,287,086 | \$54,747,357 | \$43,718,102 | \$295,677,515 |

CHARITABLE GIFT 3 YR HISTORY

2013/2014 Fiscal Year Chart V

| | 2010/2011 | 2011/2012 | 2012/2013 |
|-----------------------------------|----------------------|----------------------|----------------------|
| SOURCE OF SUPPORT | | | |
| INDIVIDUALS | | | |
| Alumni | \$40,186,263 | \$56,541,930 | \$61,611,131 |
| Parents | \$3,875,175 | \$3,672,280 | \$3,747,218 |
| Other Individuals | \$63,127,699 | \$75,576,642 | \$89,328,890 |
| INDIVIDUALS TOTAL | \$107,189,137 | \$135,790,852 | \$154,687,240 |
| ORGANIZATIONS | | | |
| Foundations | \$69,740,116 | \$79,694,411 | \$71,116,484 |
| Corporations | \$51,687,437 | \$51,313,933 | \$53,233,742 |
| Other Organizations | \$11,561,338 | \$16,133,305 | \$16,640,049 |
| ORGANIZATIONS TOTAL | \$132,988,891 | \$147,141,649 | \$140,990,275 |
| SOURCE OF SUPPORT TOTAL | \$240,178,028 | \$282,932,501 | \$295,677,515 |
| GIFT PURPOSES | | | |
| CURRENT OPERATIONS | | | |
| Unrestricted | \$7,691,216 | \$11,411,369 | \$10,114,725 |
| Restricted | \$143,697,732 | \$173,783,848 | \$166,066,312 |
| CURRENT OPERATIONS TOTAL | \$151,388,947 | \$185,195,218 | \$176,181,037 |
| CAPITAL PURPOSES | | | |
| Property, Buildings and Equipment | \$20,833,405 | \$12,927,247 | \$19,744,433 |
| Endowment: Unrestricted | \$111,580 | \$157,284 | \$1,287,086 |
| Endowment: Restricted | \$45,469,518 | \$61,988,676 | \$54,747,357 |
| Loan Funds | \$100 | \$11,080 | \$0 |
| CAPITAL PURPOSES TOTAL | \$66,414,603 | \$75,084,287 | \$75,778,876 |
| Deferred Gifts | \$22,374,477 | \$22,652,997 | \$43,718,102 |
| GIFT PURPOSES TOTAL | \$240,178,028 | \$282,932,501 | \$295,677,515 |

ENDOWMENT

2013/2014 Fiscal Year Chart VI

| | 2011/2012 Market Value | 2012/2013 Market Value | 2013/2014 Market Value | 2012/2013 to 2013/2014 Comparison | | 2011/2012 Investment Return Rate | 2012/2013 Investment Return Rate | 2013/2014 Investment Return Rate | Three Year Average | 2013/2014 Gifts to Endowment | 2013/2014 Endowment Distribution |
|-----------------------------|------------------------------|------------------------------|------------------------------|--------------------------------------|---------------|---|---|---|--------------------------|------------------------------------|--|
| | | | | Amount | Percentage | | | | | | |
| GROUP I | | | | | | | | | | | |
| Bakersfield | \$17,961,094 | \$20,178,522 | \$23,498,108 | \$3,319,586 | 16.45% | 0.00% | 13.43% | 15.44% | 9.62% | \$537,631 | \$872,025 |
| Channel Islands | \$9,226,137 | \$11,972,377 | \$13,341,289 | \$1,368,912 | 11.43% | -3.90% | 12.30% | 17.20% | 8.53% | \$80,600 | \$211,786 |
| Dominguez Hills | \$9,633,555 | \$11,159,758 | \$11,843,647 | \$683,889 | 6.13% | 2.58% | 14.00% | 13.93% | 10.17% | \$362,690 | \$594,083 |
| East Bay | \$10,368,835 | \$13,448,690 | \$15,800,824 | \$2,352,134 | 17.49% | -1.94% | 10.50% | 17.21% | 8.59% | \$572,899 | \$442,763 |
| Humboldt | \$22,269,786 | \$24,426,936 | \$26,166,024 | \$1,739,088 | 7.12% | 0.10% | 10.41% | 15.52% | 8.68% | \$686,107 | \$830,898 |
| Los Angeles | \$18,559,176 | \$21,148,375 | \$25,863,588 | \$4,715,213 | 22.30% | -3.60% | 9.60% | 15.10% | 7.03% | \$3,446,739 | \$769,701 |
| Maritime Academy | \$3,720,281 | \$5,408,542 | \$6,729,859 | \$1,321,317 | 24.43% | -2.90% | 6.24% | 15.34% | 6.23% | \$622,277 | \$149,292 |
| Monterey Bay | \$14,019,682 | \$15,954,357 | \$18,325,078 | \$2,370,721 | 14.86% | -1.30% | 11.70% | 17.70% | 9.37% | \$188,711 | \$650,150 |
| San Bernardino | \$19,170,823 | \$21,312,720 | \$24,457,752 | \$3,145,032 | 14.76% | -3.40% | 11.40% | 15.80% | 7.93% | \$575,528 | \$707,179 |
| San Marcos | \$17,262,634 | \$20,527,619 | \$23,296,164 | \$2,768,545 | 13.49% | -3.00% | 12.90% | 18.60% | 9.50% | \$185,196 | \$639,874 |
| Stanislaus | \$9,232,436 | \$10,731,223 | \$11,953,585 | \$1,222,362 | 11.39% | -1.92% | 8.06% | 12.48% | 6.21% | \$46,119 | \$294,380 |
| PEER GROUP I TOTAL | \$151,424,439 | \$176,269,119 | \$201,275,918 | \$25,006,799 | 14.19% | -1.75% | 10.96% | 15.85% | 8.35% | \$7,304,497 | \$6,162,131 |
| GROUP II | | | | | | | | | | | |
| Chico | \$42,174,342 | \$48,498,024 | \$52,562,821 | \$4,064,797 | 8.38% | -0.80% | 11.50% | 14.00% | 8.23% | \$2,943,112 | \$1,531,275 |
| Fullerton | \$34,276,674 | \$42,547,517 | \$50,112,038 | \$7,564,521 | 17.78% | -2.46% | 8.95% | 12.13% | 6.21% | \$3,476,358 | \$1,167,884 |
| Northridge | \$63,639,683 | \$72,448,632 | \$77,506,181 | \$5,057,549 | 6.98% | -2.78% | 11.40% | 15.50% | 8.04% | \$4,820,073 | \$2,787,253 |
| Pomona | \$55,579,506 | \$69,290,107 | \$86,650,443 | \$17,360,336 | 25.05% | -1.38% | 10.95% | 15.80% | 8.46% | \$8,569,499 | \$3,387,912 |
| Sacramento | \$28,316,872 | \$29,317,581 | \$33,655,214 | \$4,337,633 | 14.80% | -1.00% | 11.10% | 8.98% | 6.36% | \$2,059,365 | \$923,995 |
| San Francisco | \$51,203,719 | \$55,209,507 | \$65,384,812 | \$10,175,305 | 18.43% | 2.17% | 10.86% | 13.34% | 8.79% | \$4,102,238 | \$1,689,353 |
| Sonoma | \$35,018,336 | \$37,069,743 | \$43,092,301 | \$6,022,558 | 16.25% | -4.00% | 9.00% | 12.70% | 5.90% | \$509,624 | \$1,028,224 |
| PEER GROUP II TOTAL | \$310,209,132 | \$354,381,111 | \$408,963,810 | \$54,582,699 | 15.40% | -1.46% | 10.54% | 13.21% | 7.43% | \$26,480,269 | \$12,515,896 |
| GROUP III | | | | | | | | | | | |
| Fresno | \$129,447,827 | \$142,839,125 | \$162,100,727 | \$19,261,602 | 13.48% | -0.63% | 9.90% | 13.06% | 7.44% | \$5,500,820 | \$6,721,682 |
| Long Beach | \$44,084,299 | \$50,528,887 | \$57,000,071 | \$6,471,184 | 12.81% | -2.40% | 11.90% | 14.10% | 7.87% | \$1,627,833 | \$2,032,185 |
| San Diego | \$136,408,000 | \$158,406,000 | \$190,608,000 | \$32,202,000 | 20.33% | -1.20% | 11.92% | 17.35% | 9.36% | \$7,140,506 | \$5,071,848 |
| San José | \$74,813,247 | \$99,869,022 | \$119,265,488 | \$19,396,466 | 19.42% | -1.23% | 11.46% | 15.80% | 8.68% | \$3,146,855 | \$3,671,822 |
| San Luis Obispo | \$168,371,557 | \$184,048,075 | \$207,779,403 | \$23,731,328 | 12.89% | -0.20% | 10.90% | 15.50% | 8.73% | \$4,675,648 | \$7,279,645 |
| PEER GROUP III TOTAL | \$553,124,930 | \$635,691,109 | \$736,753,689 | \$101,062,580 | 15.90% | -1.13% | 11.22% | 15.16% | 8.42% | \$22,091,662 | \$24,777,182 |
| Chancellor's Office | \$10,933,190 | \$14,361,030 | \$19,539,352 | \$5,178,322 | 36.06% | -0.95% | 10.55% | 14.62% | 8.07% | \$158,015 | \$361,853 |
| SYSTEMWIDE TOTAL | \$1,025,691,691 | \$1,180,702,369 | \$1,366,532,769 | \$185,830,400 | 15.74% | -1.51% | 10.87% | 14.88% | 8.08% | \$56,034,443 | \$43,817,062 |

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: Dominguez Hills revised 2011-2012 and 2012-2013 endowment data.

| | Number of Addressable Alumni | Alumni Solicited | Alumni Donors | Total Alumni Contributions | Alumni Participation Rate |
|-----------------------------|------------------------------|------------------|---------------|----------------------------|---------------------------|
| GROUP I | | | | | |
| Bakersfield | 43,021 | 685 | 153 | \$226,707 | 0.36% |
| Channel Islands | 9,020 | 8,977 | 443 | \$21,967 | 4.91% |
| Dominguez Hills | 86,749 | 36,875 | 1,142 | \$100,650 | 1.32% |
| East Bay | 115,290 | 91,062 | 777 | \$365,379 | 0.67% |
| Humboldt | 50,526 | 31,096 | 3,585 | \$1,371,471 | 7.10% |
| Los Angeles | 145,087 | 58,716 | 2,440 | \$1,625,665 | 1.68% |
| Maritime Academy | 4,168 | 3,110 | 166 | \$116,819 | 3.98% |
| Monterey Bay | 9,851 | 9,364 | 241 | \$40,416 | 2.45% |
| San Bernardino | 63,988 | 33,045 | 1,255 | \$232,702 | 1.96% |
| San Marcos | 33,258 | 17,790 | 394 | \$64,361 | 1.18% |
| Stanislaus | 53,203 | 240 | 176 | \$105,155 | 0.33% |
| PEER GROUP I Total | 614,141 | 290,960 | 10,772 | \$4,271,292 | 1.75% |
| GROUP II | | | | | |
| Chico | 143,549 | 36,562 | 6,470 | \$1,739,411 | 4.51% |
| Fullerton | 216,246 | 190,112 | 4,450 | \$1,426,854 | 2.06% |
| Northridge | 296,315 | 238,541 | 4,809 | \$2,044,613 | 1.62% |
| Pomona | 120,954 | 50,410 | 3,495 | \$2,095,579 | 2.89% |
| Sacramento | 210,048 | 140,332 | 3,176 | \$1,228,669 | 1.51% |
| San Francisco | 279,575 | 31,559 | 4,207 | \$2,498,308 | 1.50% |
| Sonoma | 59,546 | 59,500 | 340 | \$261,024 | 0.57% |
| PEER GROUP II Total | 1,326,233 | 747,016 | 26,947 | \$11,294,458 | 2.03% |
| GROUP III | | | | | |
| Fresno | 188,685 | 156,557 | 4,964 | \$6,264,199 | 2.63% |
| Long Beach | 271,164 | 145,226 | 8,201 | \$3,210,192 | 3.02% |
| San Diego | 292,458 | 142,249 | 11,270 | \$14,167,107 | 3.85% |
| San José | 212,968 | 180,062 | 4,812 | \$17,542,860 | 2.26% |
| San Luis Obispo | 161,835 | 70,942 | 6,525 | \$4,861,023 | 4.03% |
| PEER GROUP III Total | 1,127,110 | 695,036 | 35,772 | \$46,045,381 | 3.17% |
| SYSTEMWIDE Total | 3,067,484 | 1,733,012 | 73,491 | \$61,611,131 | 2.40% |

Note 1: Alumni Participation Rate equals Alumni Donors divided by Number of Addressable Alumni.

DEFINITION OF TERMS

Charitable Gift Commitments

The data represents 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 on-going commitments through multi-year pledges and support promised through testamentary provisions in wills, trusts, and beneficiary designations. Testamentary provisions 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, represents 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, gifts are counted at face 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. The Council for Aid to Education utilizes these standards 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 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.

Group I

Universities categorized within Group I generally have less than 5,000 individual donors, less than 10 full-time professional fundraisers, and less than \$25 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 \$25 million and \$50 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 over 10,000 individual donors, over 20 full-time professional fundraisers, and over \$50 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)

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

Endowment

Funds to be retained and invested for income-producing purposes.

Loan Funds

Outright gifts restricted by donors to be available for loans to students, faculty and staff.

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.

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. An affiliation as an alumnus takes precedence over that of a parent for the purpose of this report.



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.

Testamentary Commitments

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.



2013/2014 PHILANTHROPIC SUPPORT ANNUAL REPORT

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