



**CSU**

The California  
State University

# A BOLD STEP FORWARD

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2020-2021 Donor Support



# TABLE OF CONTENTS

<b>WELCOME AND OVERVIEW .....</b>	<b>1</b>
<b>STORIES OF GIVING .....</b>	<b>4</b>
<b>ACADEMIC ENRICHMENT .....</b>	<b>6</b>
<b>WANG AWARD .....</b>	<b>12</b>
<b>STUDENT ACHIEVEMENT .....</b>	<b>14</b>
<b>STUDENT ATHLETICS .....</b>	<b>20</b>
<b>STUDENT SCHOLARSHIPS .....</b>	<b>24</b>
<b>TRUSTEES' AWARD .....</b>	<b>28</b>
<b>APPENDIX .....</b>	<b>30</b>
<b>DEFINITION OF TERMS .....</b>	<b>44</b>

## A MESSAGE FROM THE CHANCELLOR

I'm pleased to report that the California State University experienced exceptionally generous philanthropic support during the 2020-21 fiscal year. During a time filled with pandemic challenges, we still received more than \$634 million in gift commitments, which is equivalent to last year's all-time high. Even more remarkable were our gift receipts, which totaled more than \$552 million—a new record for the university. That volume of giving, coupled with strong investment returns, enabled the CSU's endowment value to rise to \$2.4 billion, surpassing the \$2 billion mark for the first time in our 61-year history.

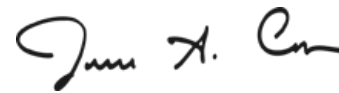
Such momentum reflects the support of truly extraordinary donors. Philanthropist and author MacKenzie Scott and her husband, Dan Jewett, are two such individuals. Their collective gift of \$135 million, divided among four CSU campuses, recognized the university's success in creating pathways for progress among traditionally underserved communities. It will enable us to do even more in the future.

Certainly, our philanthropic achievements could not have occurred without the work and determination of CSU staff and faculty who continued to build relationships and generate awareness of our progress, our alumni who

rallied behind their alma maters to support students and programs, and wonderful friends of the university who recognized how our campuses serve as wellsprings for innovation in their communities.

Our collective resilience yielded remarkable success academically, as well: A record 113,000 students earned bachelor's degrees throughout last year—powerful evidence of our progress in achieving the ambitious goals of Graduation Initiative 2025. This latest class of graduates pushed the number of CSU global alumni to more than 4 million, and increased the depth and breadth of their impact across California, the nation and the world.

To all those who continued to believe in the mission and core values of the CSU during one of our most challenging years—thank you. Your support empowered us to take another bold step forward. I am humbled and grateful.



Joseph I. Castro  
Chancellor



## OVERVIEW

The California State University enjoyed another year of strong support from its donors. This robust support, even as California and the nation navigated the COVID-19 pandemic, demonstrates the steadfast confidence that many have in the university to create lasting success.

In fiscal year 2020-21, the CSU received more than \$634 million in gift commitments and a record of more than \$552 million in gift receipts. The CSU's cumulative endowment market value also reached a record-breaking high of \$2.4 billion. This support provided both immediate assistance to members of our campus communities who were navigating hardships as a result of the pandemic and laid the groundwork for progress that will be felt by the university for years to come.

This exceptional donor support was driven in large part by comprehensive campus campaigns that elevate campus programs and increase student success. California State University, Chico's "Transform Tomorrow" campaign exceeded its \$100 million goal. Meanwhile, California State University, Sacramento's "On the Rise" and California State University, Fullerton's "It Takes a Titan" campaigns continued to spread a culture of philanthropy among their stakeholders and made impressive progress toward their goals.

The CSU's record support was also a result of transformative gifts from donors who see the university as an agent of positive change. Philanthropist and author MacKenzie Scott and her husband, Dan Jewett, were two such donors whose gift to campuses totaled \$135 million and was the largest in the university's history.

The generous investment by donors in the California State University will allow for the lasting prosperity of the university's programs and students. This report explores the scope of our donor support and provides a few examples of its impact across the university and the state.

## GIFTS RECEIVED

Donors' generosity in 2020-21 resulted in more than \$552 million in gifts received by the university. Of that, 27 percent—about \$150 million—is unrestricted. The remainder is designated by donors to support university efforts.

Donor-designated support of \$230.7 million for current programs included:

- \$68.7 million for faculty support and academic enrichment;
- \$41.6 million for public service programs;
- \$36.3 million for student scholarships;
- \$4.1 million for equipment and facility improvements; and
- \$80 million for additional university priorities.

For long-term capital projects, campuses received \$52.2 million for major facility construction and renovation.

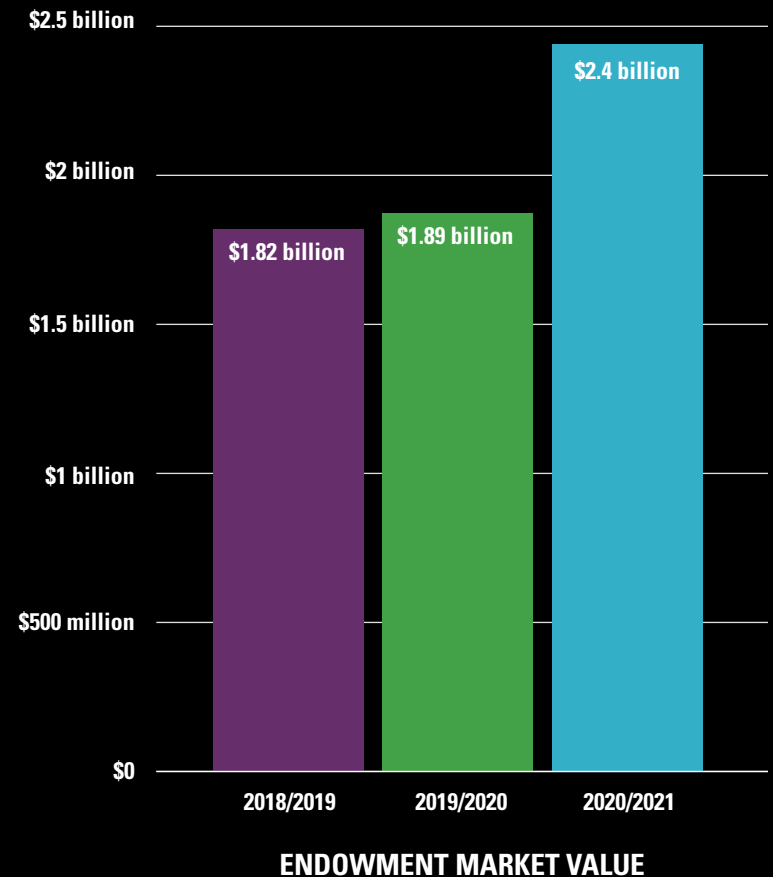
Endowments grew by \$113.2 million in new contributions, which provide support in perpetuity. In 2020-21, endowments distributed \$71 million to fund areas across the university. More than half of endowment gifts are designated for scholarships.

Donors committed an additional \$6.7 million in irrevocable deferred gifts.

Philanthropic support across the CSU provided \$91.5 million in private scholarships to students. Combined with state and federal aid, this assistance reduces the financial burden of students and their families.

# \$71 MILLION

## ENDOWMENT DISTRIBUTION





# STORIES OF GIVING





# ACADEMIC ENRICHMENT

Gifts from donors throughout California and beyond help ensure CSU students—in entertainment and the arts, technology, business, agriculture, hospitality, health care and so much more—have the tools, resources and experiences to discover, build and take charge of their careers and life trajectories.

It is the unflagging support of donors that makes the difference, from teaching and research to community service and career engagement. As strategic partners, donors enable the CSU to offer unique learning opportunities. In turn, California's economy benefits from graduates who are well-prepared to succeed in the 21st century workplace.





*Big Chico Creek Ecological Reserve*

### **HISTORIC GIFT SUPPORTS WILDLANDS EDUCATION**

A \$1 million gift to the Big Chico Creek Ecological Reserve at California State University, Chico will directly support the education of the next generation of land stewards and conservationists enrolled on campus. Donated by Professor Emeritus Wes Dempsey and his wife, Phyllis, along with their family, the Wesley and Phyllis Dempsey Endowment in Memory of David P. Dempsey is the largest cash gift ever given to the reserve.

“This legacy endowment is a monumental testament to the Dempsey family’s commitment to the natural world and the importance of stewarding these increasingly scarce and valuable lands,” said Ecological Reserves Director Eli Goodsell. The Dempsey family is especially appreciative of Goodsell’s tireless work to increase research, scholarship and student success through experiential learning.

This groundbreaking endowment will support graduate student research in the recently launched master’s-level Wildland Management Program at Chico State. The endowment builds on another historic gift—3,885 acres given by an anonymous donor—that nearly doubled the size of the reserve, making it the largest in the CSU.



*CSULB Jazz Ensemble*

### **A GIFT TO JAZZ THINGS UP**

When in-person performances were canceled during the COVID-19 pandemic, it deprived the College of the Arts at California State University, Long Beach of a crucial source of scholarship revenue. Undeterred, the college partnered with the campus’s Annual Fund to create a new crowdfunding initiative.

The project caught the attention of first-time donor Tony Helferich, who was inspired to make a significant gift to honor the work of his sister, Director of Vocal Jazz Christine Guter, and to bolster the financial resources available to music students pursuing their path to graduation.

Augmented by current-use funds to supplement the first-year endowment distribution, the Christine Helferich Guter Endowment for Vocal Jazz will provide permanent support to the university’s award-winning vocal jazz program, making it possible for Guter and her colleagues to recruit and retain exceptionally talented students who will bring a variety of “voices” to the campus—and to the art form.



*Cal State LA business students*

### **\$1 MILLION GRANT FOSTERS ENTREPRENEURSHIP AND BUSINESS SUCCESS**

A \$1 million grant from Wells Fargo Bank will support the launch of a new student entrepreneurship program at Cal State LA that aims to help communities recover from the economic effects of the pandemic.

The program supports Cal State LA students who want to learn more about entrepreneurship and ways to help small-business owners—particularly women who identify as Black, Indigenous or people of color—recover from the pandemic. Students will take part in intensive training and work alongside entrepreneurs, while positioning themselves and local communities to innovate and thrive in a postpandemic world.

The Wells Fargo grant is part of a \$3.6 million Open for Business grant that the bank has given to organizations to provide multicultural and multilingual assistance and resources to help small-business owners, especially in the tech and entertainment industries.



Cal Maritime students

### **NEW SCHOLARSHIP OPENS DOORS FOR STUDENTS FROM UNDERSERVED COMMUNITIES**

Underserved students from the California cities of Compton, Oakland, Richmond and Vallejo are now eligible for a new scholarship at California State University Maritime Academy, thanks to a \$200,000 donation from alumnus William N. Andrew and his wife, Sally G. Andrew. They established the Scholarship for Equity and Social Justice as “a way to lend a helping hand to underserved young men and women, who otherwise may not be able to attend a great school like Cal Maritime,” Sally explained.

Muang Pharn, a business administration major from Richmond, is the inaugural awardee. “Coming from a background of an underserved community not only presented financial and academic challenges but also instilled in me the importance of higher education,” Pharn said. “This scholarship will help ease some of the financial burdens that come along with being a full-time college student.”



Tara Sethia

### **ENDOWED CHAIR FOCUSES ON REVERENCE FOR ALL LIFE**

Gracious donors Prem and Sandhya Jain, Jasvant and Meera Modi, and Bipin and Rekha Shah joined together to fund the Shri Shantinath Endowed Chair in Ahimsa Studies at California State Polytechnic University, Pomona.

“Ahimsa” means reverence for all life. The Ahimsa Center at Pomona was established in 2003 by Tara Sethia, professor of history. Sethia will also be the first to receive the endowed chair title. Under her leadership, the center’s programs have included an interdisciplinary minor in nonviolence studies, summer fellowship programs for K-12 educators in nonviolence and nonviolent social change, and numerous public programs.

“The Ahimsa Center has been a transformative experience for our students and community as it embraces the tenets of nonviolence, which regards every individual as part of the whole. In the dignity of one, lies the dignity of all,” said Iris Levine, dean of the College of Letters, Arts and Social Sciences.



## **VULNERABLE POPULATIONS BENEFIT FROM STREET MEDICINE GRANT**

The Desert Healthcare District and Foundation awarded a \$50,000 grant to the California State University, San Bernardino Palm Desert Campus to support its Street Medicine program. The program has a twofold purpose: to provide much-needed health-care services for homeless and unsheltered people in the Coachella Valley and to prepare future nurses to understand the needs of these individuals.

Grant funds will be used to strengthen the engagement between vulnerable populations in the region and nurses and nursing students, improve access to health care for traditionally underserved populations by increasing access to mobile medical clinics, and improving health-related infrastructure in the Coachella Valley.

“Through the Street Medicine program, nurses and nursing students provide an invaluable service, taking medical care to Coachella Valley residents who may not receive it any other way,” said Carole Rogers, a registered nurse and Desert Healthcare District and Foundation board director.

## **FUNDING THE FUTURE OF ORGANIC AGRICULTURE**

A \$5 million donation from Grimmway Farms to the College of Agriculture, Food and Environmental Sciences at California Polytechnic State University, San Luis Obispo will change the landscape of organic agriculture. The gift will provide research and teaching opportunities in topics related to healthy soils, water and air, and will be used to launch the Center for Organic Production and Research on campus, as well as build the Grimmway Farms/Cal-Organic Soil Health and Sustainability Laboratories.

“We believe that lives are transformed through education, and that certainly applies to agricultural education,” said Barbara Grimm Marshall, co-owner of Grimmway and Cal-Organic Farms. “Ever-evolving technologies and more sophisticated business practices mean that students who wish to pursue a career in agriculture must spend as much time in the classroom as in the field. We are thrilled to provide an avenue for these students to work with the best minds in agribusiness and soil sciences today.”

## ALUMNI ESTABLISH QUEER ETHNIC STUDIES ENDOWMENT

A lifelong passion for social equity fueled the decision by San Francisco State University alumni Connell Persico and Clay Heironimus to create the C&C Fellowship in Queer Ethnic Studies Endowment with a planned gift of \$400,000. Once funded, the endowment will disburse two to four annual fellowship awards of \$4,000 to \$8,000 to undergraduate students in the College of Ethnic Studies who minor or major in queer ethnic studies.

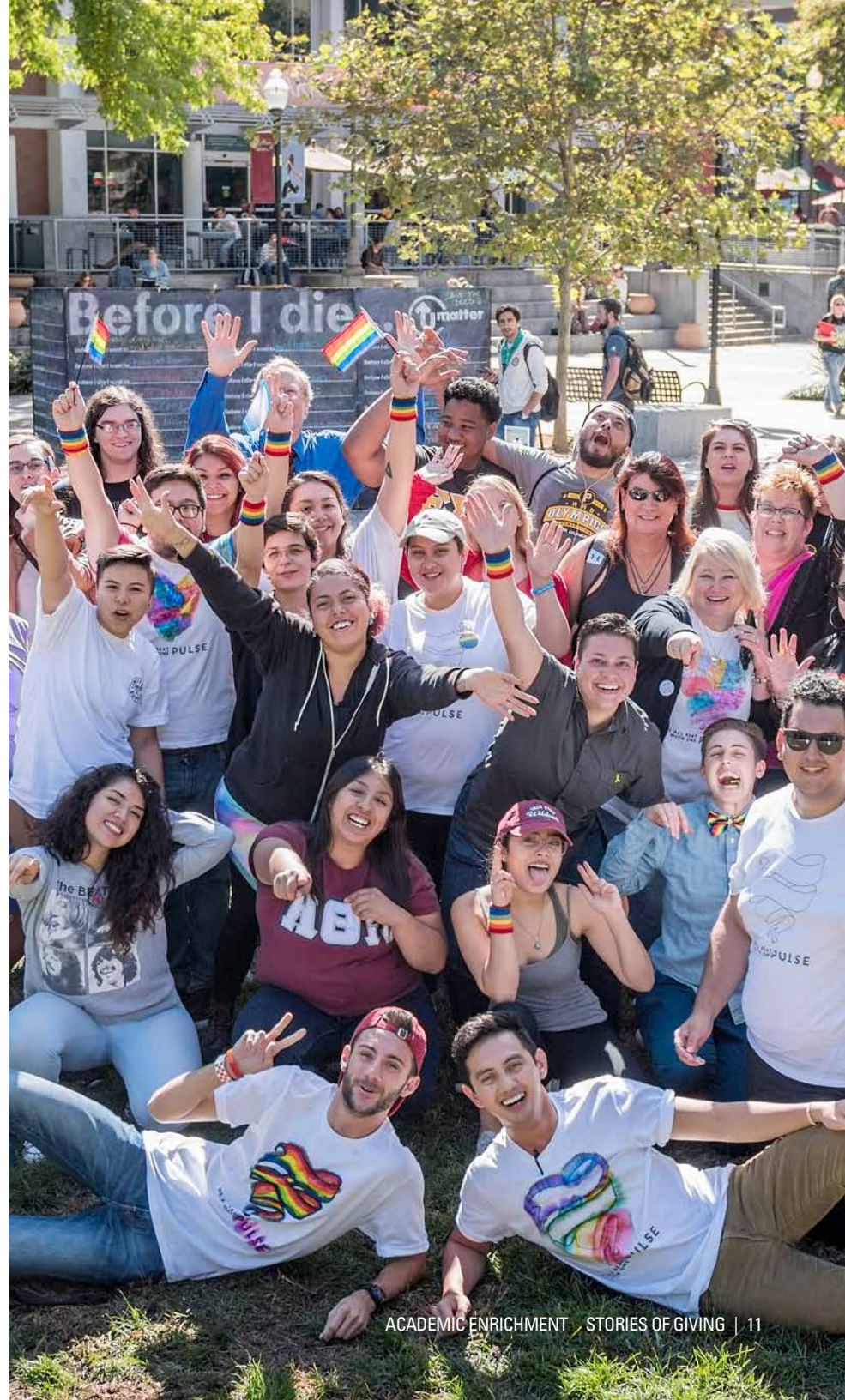
Persico and Heironimus were motivated in part by the inequities revealed by the COVID-19 pandemic and its weighted impact on marginalized communities. The couple had previously been impressed by issues of community, equity and cultural diversity presented during the 2019 Student Showcase of the SFSU College of Ethnic Studies. “I was blown away by the quality of work done by students in addressing issues of community,” Persico said. “The work demonstrated an incredible level of compassion and commitment to the communities from which the students came.”

The intersection of anger at COVID-19 treatment inequities and awe at student academic prowess led Persico and Heironimus to finalize their trust so that their funds could be used to spark social change. Their annual fellowship awards will support the education of antiracist community leaders, particularly those working to empower and advance queer people of color for an equitable LGBTQ community.

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**“I was blown away by the quality of work done by students. ... The work demonstrated an incredible level of compassion and commitment to the communities from which the students came.”**

*—Connell Persico*



A woman with glasses and a checkered shirt stands in a workshop, holding a large trophy. The background is filled with various tools and equipment, including a desk lamp and a workbench. The entire image has a blue tint.

# WANG AWARD

The Wang Family Excellence Award recognizes four outstanding faculty members and one outstanding administrator from across the CSU. The five award recipients have distinguished themselves through extraordinary commitment and exemplary achievements. Each recipient receives \$20,000.

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

## 2021 WANG FAMILY EXCELLENCE AWARD RECIPIENTS

**Judith E. Canner, Ph.D.**

Outstanding Faculty Teaching Award  
California State University, Monterey Bay

**Cynthia A. Crawford, Ph.D.**

Outstanding Faculty Innovator in Student Success Award  
California State University, San Bernardino

**Aydin Nazmi, Ph.D.**

Outstanding Faculty Service Award  
California Polytechnic State University, San Luis Obispo

**Hala Madanat, Ph.D.**

Outstanding Faculty Scholarship Award  
San Diego State University

**Gerald L. Jones, J.D.**

Outstanding Staff Performance Award  
Sonoma State University

*Photos shown from left to right.*



A student in a white graduation gown and black mask is being pinned by two people, one on the left and one on the right. The student is looking down at their chest. The background is a blurred outdoor setting with trees. The entire image has a blue overlay.

# STUDENT ACHIEVEMENT

As the nation's largest and most diverse higher-education institution, the California State University provides extraordinary academic opportunities for students of all backgrounds. These include the university's transformative Graduation Initiative 2025, which continues to chart innovative approaches to student achievement and degree completion while working to close equity gaps.

Donor support is key to the fulfillment of that strategic commitment to CSU students. Through their investments in scholarships, fellowships, programs and chairs, donors foster the intellectual and social prowess that define a CSU education. They nurture the physical health and mental well-being of student-scholars and provide opportunities for career engagement that enhance the value of a CSU degree.





### **GIFT STRENGTHENS PEER MENTORSHIP PROGRAMS**

Citing the career readiness of California State University Channel Islands graduates and the caliber of their leadership, Jeff Green, chief executive officer and cofounder of The Trade Desk (TTD), gifted \$250,000 to the campus. The gift from the Jeff Green Family Foundation strengthens programs that provide peer mentors for students who are the first in their families to attend college.

Green believes peer mentorship programs are among the most powerful strategies to support students from their first day as a freshman to their last day as a senior.

The gift made it possible to hire 15 new peer mentors for the fall 2020 semester and to support a staff position to help keep the peer mentor infrastructure strong. The foundation contributed an additional \$250,000 in a tiered scholarship fund that allows recipients to receive increasing amounts of scholarship funding each year they remain in college.



### **SONY MUSIC GROUP SUPPORTS MALE SUCCESS ALLIANCE**

The Male Success Alliance (MSA) at California State University, Dominguez Hills received funding from the Sony Music Group to help support MSA members and to develop new programs for male students of color at partner K-12 schools in South Los Angeles and the South Bay.

With the Sony Music Group funding, 20 MSA members will receive a stipend through the MSA Scholarship Program, which requires scholars to participate and volunteer in its many programs and outreach efforts. The Sony donation will also empower the alliance to develop a semester-long introductory seminar focused on racial justice and equity, as well as college success and retention.

Founded in 2009, MSA works to improve graduations rates of young men of color through a strong support system that promotes scholarship and intellectual curiosity, leadership, identity development and civic engagement among its members.



*Amendola Family Student Cupboard*

### **GENEROUS GIFT ENSURES PERMANENT FUNDING FOR STUDENT CUPBOARD**

A generous gift from Lou and Jane Amendola will help reduce food insecurity for students at California State University, Fresno. Their \$1.5 million endowment ensures the financial sustainability of the campus' student cupboard, a service that provides Fresno State students with free fresh and nonperishable food items and hygiene products. Since opening its doors in 2014, the facility has served more than 28,000 students. In recognition of their gift, the cupboard was renamed the Amendola Family Student Cupboard.

"It's nice to have some place where students can go to grab something or make something, which puts a little less pressure on them, so they can do well in school," said Lou Amendola, owner and CEO of Valley Wide Beverage.

The Amendolas are longtime supporters of Fresno State, donating to the university's athletics programs as well as issuing matching gift challenges to other donors for the student cupboard.



### COMMUNITY SUPPORT FOR STUDENTS TAKES MANY FORMS

Students balancing school and work were hit hard by the economic impact of COVID-19. That's when California State University, Sacramento and local communities stepped forward to provide much-needed help. Within a two-month period, more than \$170,000 poured in to support student basic needs.

For example, Umpqua Bank made an unrestricted gift to Sacramento State Crisis Assistance & Resource Education Support (CARES) fund and to the Guardian Scholars programs, while local restaurateur Chris Jarosz worked with the city to deliver 6,000 packaged meals to students. A philanthropist made a \$500,000 unrestricted gift to support programs focusing on student wellness, mental-health initiatives and academic centers. And a Swarmfunding campaign generated donations that supported the Associated Students Inc. (ASI) Food Pantry, the Seth Nelsen Emergency Grant, Student Emergency Housing and Sacramento State CARES. Students facing food insecurity also received help when the city of Sacramento provided the ASI Food Pantry with grocery gift cards.



### PREBYS FOUNDATION GRANT BENEFITS PERFORMING ARTS

The Conrad Prebys Foundation awarded a \$6 million grant to San Diego State University's College of Professional Studies and Fine Arts (PSFA) for a new stage for student productions and rehearsals. The stage was renamed for Conrad Prebys and will be part of a renovated Performing Arts District and a new creative hub at SDSU.

Peggy Shannon, dean of PSFA, called the grant transformational. "The Conrad Prebys Foundation gift ensures a state-of-the-art venue that facilitates excellent training and performance opportunities for SDSU students and faculty," she said.

The gift to PSFA's "On to a New Stage" fundraising campaign builds on previous funding from the university to upgrade the existing theatre and create a full-fledged Performing Arts District. This reflects SDSU's commitment to provide students and faculty with top-tier artistic experiences and community members with high-quality and affordable arts programming.



### WINE INDUSTRY INVESTS IN ITS FUTURE LEADERS

With a commitment of nearly \$1 million from the wine industry's leading brands, Sonoma State University launched the Wine Business Institute's (WBI) Inclusive Excellence Program. This program establishes a cohort of students from underrepresented backgrounds who, through scholarships, internships and mentoring programs, will be guided toward successful executive-level careers in the wine business. In addition, the Napa Valley Vintners and the United Negro College Fund earmarked significant scholarship support for students.

The WBI's Inclusive Excellence Program is the most recent initiative launched at Sonoma State by wine industry partners. In 2017, the WBI board of directors started the Wine Industry Scholars Program, which has raised more than \$2.2 million in scholarships and academic support for first-generation, low-income students with familial links to the wine industry. Over the next five years, about 200 students will benefit from scholarships, academic and career mentoring, and paid internships.



### EMPOWERING VOICES THE WORLD NEEDS TO HEAR

Citing her conviction that "people working to build power from within communities are the agents of change," novelist and philanthropist MacKenzie Scott and her husband, Dan Jewett, donated a record-setting \$135 million to four CSU campuses in spring 2021. These unrestricted gifts allow the campuses to utilize the money however they see fit to best meet the unique needs of their diverse students.

The four CSU campuses are California State University Channel Islands (\$15 million), California State University, Fullerton (\$40 million), California State University, Northridge (\$40 million) and California State Polytechnic University, Pomona (\$40 million). Each of these gifts were the biggest ever received by these campuses.

In a June blog post, Scott explained, "Higher education is a proven pathway to opportunity, so we looked for two- and four-year institutions successfully educating students who come from communities that have been chronically underserved. We chose to make relatively large gifts, both to enable their work, and as a signal of trust and encouragement to them and to others."

The campus presidents recognized the transformative power the gifts will provide their institutions and expressed deep gratitude for the recognition of the work their campuses are doing.

## PORGES FAMILY FOUNDATION GIFT ESTABLISHES ENTREPRENEURSHIP INITIATIVE

California State University, Stanislaus received a \$250,000 gift from the Porges Family Foundation to establish a multifaceted program designed to inspire, mentor and financially support emerging entrepreneurs as they seek to build new business ventures. The gift creates the Warrior Entrepreneurship Initiative, a comprehensive three-year pilot built to stimulate a robust culture of enterprise, connect the campus to the Central Valley's entrepreneurial ecosystem, engage and enlist members of the regional business community to share experiences and networks, expand the number of startup businesses in the region, and increase the number of students engaged in entrepreneurial activities.

"Stan State has so many first-generation students and graduates who haven't considered entrepreneurship," said Norm Porges, cofounder of the Porges Family Foundation. "They may be ready to take some big steps and this gives them a steppingstone."

The initiative consists of several components, including a faculty fellowship, a business competition, a volunteer entrepreneurs-in-residence program and a scholarship fund. The effort also incorporates the university's annual Champions of the American Dream award and event.

"This gift from the Porges family creates a strong, visionary foundation for our campus to be able to build powerful innovative, entrepreneurial opportunities and professional growth for our students while collaborating and contributing to the region's economic development," said Stanislaus State President Ellen Junn.

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*—Norm Porges*





# STUDENT ATHLETICS

More than just participants in sporting events, student-athletes across the California State University represent a commitment to teamwork, dedication, discipline and time management. The designation “student-athlete” acknowledges that academics come first, but the skills and characteristics honed on the playing fields provide a profound impact on classroom learning and career success.

Donor support helps the CSU foster an environment of leadership, personal accountability and hard work among the thousands of students who participate in the university’s many athletic programs. Additionally, it brings together campuses and communities, alumni and students, and fans of every stripe to create a sense of shared purpose and commitment.



### **ALUMNI STUDENT-ATHLETES THANK AQUATICS COACH WITH SCHOLARSHIP**

Three-time All-American diver Lori Stilson-Armstrong joined California State University, East Bay Pioneers swimming star Brad Gothberg and fellow alumnus water polo goalie Steve Victorson to announce the creation of a scholarship honoring their former coach and mentor, Cal Caplan.

“I had absolutely no idea this was going on. I was speechless,” Coach Caplan said of the scholarship announcement, adding, “This scholarship fulfills a recognition that we are more than individuals or islands in sports.” Caplan was inducted into the Pioneer Athletics Hall of Fame in 2006 and is recognized for playing a key role in developing the university’s Physical Education and Kinesiology department.

Besides honoring Coach Caplan, the scholarship’s goal is to help the swimming and water polo coaches recruit and retain student-athletes who exemplify Caplan’s values and show promise for qualities of leadership, teamwork and high achievement in their sport and academics.



### **GIFT TO CHAMPIONSHIP PROGRAM HITS IT OUT OF THE PARK**

Joseph and Paula Cervantes, longtime Titan supporters, pledged \$75,000 to the California State University, Fullerton softball program, with an additional \$50,000 match to name the patio deck of the renovated clubhouse at the fields as The Cervantes Family Terrace.

Scheduled for completion by the 2022 season, the clubhouse modernization will also feature new offices, training rooms and a lounge. Joseph Cervantes hopes the investment in the softball facility instills pride and camaraderie among team members to continue the Titan legacy. “It is my hope that our gift will give the program a better opportunity to compete with other nationally recognized softball programs in the U.S.,” said Cervantes, senior executive vice president of operations at R.D. Olson Construction.

Titan softball head coach Kelly Ford called the Cervanteses’ support “monumental.” “This gift is just magical for us. It’s an absolute game changer for us recruiting wise.”



### **HONORING HER PARENTS TO BETTER SOCIETY**

Cyd Crampton was looking for a way to honor her parents after they passed away. "I felt that CSUMB was my best opportunity to make an impact," she said.

Crampton's father, Chuck, coached at De Anza College and several high schools during his lifetime. Following his passing, Crampton contributed toward new locker rooms for the California State University, Monterey Bay women's basketball and volleyball teams. She continues to support those programs with annual gifts.

Crampton's mother, Beverley, taught English in high school. "Shakespeare was a huge passion of hers, and she infected me with it," Crampton said. After her mother's passing, Crampton created the Beverley Cooper Crampton Memorial Scholarship at CSUMB for students who plan to become English teachers in the Tri-County area.

"Education is the true equalizer," Crampton said. "To have education and knowledge is power. And the more people who have access to education, the better our society."



## BAKERSFIELD NATIVE ESTABLISHES WOMEN'S EXCELLENCE FUND

Shelly Carlin, a philanthropist and former chief human resources officer of Motorola, has committed \$500,000 over five years to support women's athletics at California State University, Bakersfield. Carlin's gift establishes the Athletics Director's Women's Excellence Fund, which will directly support CSUB's 10 women's athletic programs. The pledged gift will also increase for the first time in program history the number of scholarships available to the Roadrunner softball program to the maximum allowed by the National Collegiate Athletic Association (NCAA).

Carlin, a Bakersfield native and a former Division I softball scholar-athlete at UCLA, has long held a vested interest in the development of scholar-athletes at CSUB and within the Bakersfield community. "College sports provided the means for me to experience the world beyond the San Joaquin Valley," Carlin said. "My UCLA experience changed my life—and it's my hope that this gift can help change the lives of the Roadrunner student-athletes of the future."

CSUB President Lynnette Zelezny praised Carlin, saying the gift will advance the aspirations of women athletes at the university. Director of Athletics Kenneth "Ziggy" Siegfried echoed Zelezny's praise: "The creation of the AD's Women's Excellence Fund will impact women's athletics on our campus for many years to come."

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**"It's my hope that this gift can help change the lives of the Roadrunner student-athletes of the future."**

*—Shelly Carlin*





# STUDENT SCHOLARSHIPS

The founding vision for the California State University recognized the profound value of an educated population to the culture, society and economy of the Golden State. Over the decades, that recognition has been validated repeatedly by the many donors who annually provide millions of dollars in scholarships to help CSU students reach their academic goals.

Coupled with federal and state financial aid, scholarships ensure that economic status is not a barrier to student enrollment and participation. In fact, nearly 80 percent of all CSU students receive support to pursue their academic goals. In return, graduates are able to provide a better life for themselves and their families and contribute to the California dream.



### **NAMING RECOGNIZES TRANSFORMATIONAL GIFT**

An \$11 million commitment from alumnus Milt Valera and his wife, Debbie, promises to have a transformative effect on California State University, Northridge programs, particularly helping those students who have been in foster care. The CSUN administrative building will be named Valeras Hall in recognition of the Valeras' gift and their continuing support.

The gift creates an endowment and scholarship for the Milt and Debbie Valera EOP Resilient Scholars Program, which provides a safety net for college students who grew up in foster care, as well as scholarships and endowments in colleges across the campus.

"Some gifts cause ripples to reverberate across a university," CSUN President Erika D. Beck said. "Through this transformative gift, the Valeras—with their extraordinary depth and breadth of generosity—have made waves of positive impact that wash over our entire campus."



### **ALUMNUS COMMITS \$1 MILLION FOR SCHOLARSHIPS**

Seeking to reduce financial barriers for young people from his hometown attending college, alumnus and donor Dan Phillips committed \$1 million to generate scholarships for high school students from the Eel River Valley area. Students from all four area high schools (Ferndale, Fortuna, South Fork and South Trinity) are now eligible for scholarships as much as \$4,000 each at Humboldt State University.

Phillips, former chief technology officer at Hulu, explained that "HSU played such a significant role in my career journey. It's where I connected with incredible professors and students. Cultivating those kinds of relationships is so important as you build your career, even as a student."

Part of his commitment included a \$100,000 matching fund challenge. Phillips hopes the challenge will inspire other donors to create similar scholarships for students from Arcata, Eureka and McKinleyville schools.



### **GIFT CREATES SCHOLARSHIP FOR NURSING STUDENTS**

Alumna Sue Howland established a planned \$1.9 million gift that benefits nursing students who are single parents. The scholarship covers the tuition and costs for required books.

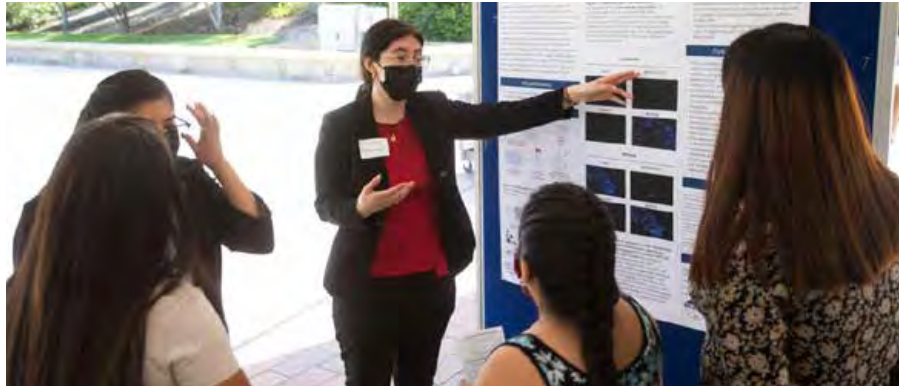
Howland made arrangements in her trust to donate the proceeds from the sale of her house to create this endowed fund at San José State University. Designated as the Judy Howland and Sue Howland Nursing Tuition/Books Scholarship, the fund is named after Howland and her mother, Julia (Judy) Howland. Although neither was a woman nurse, both recognized the incredible value and importance of the profession.

“I stand in awe of Sue Howland,” said Audrey Shillington, dean of the College of Health and Human Sciences. “So many of our students face challenges, working their way through school, often juggling multiple jobs on top of coursework and practicum commitments. Ms. Howland had the insight to recognize that single parents face additional barriers and that they are much more likely to drop out due to all the financial burdens facing them. This gift will change the lives of all the parents who receive it. Beyond this, though, the gift will impact the lives of the students’ children. This will lead to intergenerational transformation.”

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**“This gift will change the lives of the parents who receive it [and] will impact the lives of the students’ children.”**

*—Audrey Shillington*



### ENDOWING A COLLEGE ASSISTANCE MIGRANT PROGRAM SCHOLARSHIP

A \$26,000 gift from longtime California State University San Marcos supporters, Ann Hunter-Welborn and her husband, David Welborn, will establish the Dolores Huerta endowed scholarship for students involved in the campus's College Assistance Migrant Program, or CAMP. The program helps students from migrant and seasonal farmworker backgrounds transition successfully to college. "I think it's an important recognition of the contribution that migrants make to our whole society," Hunter-Welborn said.

The gift is the outgrowth of a meeting between Hunter-Welborn and CSUSM President Ellen Neufeldt in which they connected over the idea of access to higher education, especially among underrepresented groups. "Access has always been a big issue and, I think, in many ways, it's become a bigger issue in the last year," Hunter-Welborn said. "I am grateful that CSUSM has grown to be such an important part of the North County community and beyond."



A student in a white lab coat and a black face mask is working in a laboratory. They are holding a pipette and looking down at their work. The background shows laboratory equipment like a sink and various containers.

# TRUSTEES' AWARD

Trustees' Scholars represent the hopeful, hardworking 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. Donor generosity made it possible for 23 students to receive awards ranging from \$6,000 to \$15,000 this year.

Stanislaus State student Tonya Hensley was recognized as the 2021 Trustee Emeritus Ali C. Razi Scholar. Hensley faced the most difficult challenge of her life when she lost her husband and became the sole parent to their four children. Nonetheless, her family and her role as a mother gave her the strength to persevere. Currently, Hensley is a nursing major on the dean's list as well as a member of the Alpha Alpha Alpha Honor Society and the National Society of Leadership and Success. She works as a student assistant for the School of Nursing, provides free child care to single working parents and helps seniors in her community. After earning her degree, Hensley plans to work as a labor and delivery nurse.

**2021 AWARDEES:** From left to right on opposite page, Jazmin Araceli Barrita Barrita, Aurelia Nahue, Vivian Hernandez, Berenice Rojas, Angelica Gurrola, Maram Kiran, Mauricio Gomez Lopez, Janelle Chojnacki, Elaine Anne E. Araneta, Alexandra Martin, Margaret Malmquist-West, Dillon Herrick, Erika Baron, Firozeh Farahmand, Carla Cruz Medina, Bipulanda Sraman, Lawson Hardrick III, J Patterson, Hannah Bittar, Christine Lam, Ivan Gonzalez, Doshia Dodd and Tonya Hensley.





# APPENDIX





## PHILANTHROPIC PRODUCTIVITY

	2018/2019 Total Gift Commitments	2019/2020 Total Gift Commitments	2020/2021 Total Gift Commitments	Three- Year Average	2018/2019 Total Gift Receipts	2019/2020 Total Gift Receipts	2020/2021 Total Gift Receipts	Three- Year Average
<b>PEER GROUP 1</b>								
Bakersfield	\$7,710,367	\$10,341,426	\$8,463,053	\$8,838,282	\$4,618,606	\$6,904,718	\$6,460,258	\$5,994,527
Channel Islands	\$3,878,318	\$3,991,065	\$20,170,347	\$9,346,577	\$3,603,770	\$1,961,368	\$18,527,188	\$8,030,775
Dominguez Hills	\$4,828,696	\$4,501,133	\$8,320,365	\$5,883,398	\$5,621,753	\$3,004,161	\$4,531,020	\$4,385,645
East Bay	\$7,116,510	\$12,582,245	\$7,007,649	\$8,902,135	\$3,472,278	\$9,390,912	\$5,033,071	\$5,965,420
Humboldt	\$7,011,841	\$4,173,396	\$9,339,953	\$6,841,730	\$4,608,647	\$5,788,046	\$7,138,729	\$5,845,141
Maritime Academy	\$2,397,006	\$7,100,761	\$12,050,663	\$7,182,810	\$2,383,534	\$6,127,826	\$11,891,028	\$6,800,796
San Bernardino	\$6,592,728	\$9,712,809	\$9,067,292	\$8,457,610	\$6,268,662	\$5,753,785	\$4,007,700	\$5,343,382
San Marcos	\$10,685,627	\$4,769,464	\$5,501,845	\$6,985,645	\$6,769,732	\$4,543,783	\$4,327,650	\$5,213,722
Stanislaus	\$3,454,377	\$1,476,291	\$1,744,478	\$2,225,049	\$2,912,596	\$1,710,306	\$1,777,294	\$2,133,399
	<b>\$53,675,470</b>	<b>\$58,648,590</b>	<b>\$81,665,645</b>	<b>\$64,663,235</b>	<b>\$40,259,578</b>	<b>\$45,184,905</b>	<b>\$63,693,938</b>	<b>\$49,712,807</b>
<b>PEER GROUP 2</b>								
Chico	\$12,534,161	\$11,679,053	\$15,500,668	\$13,237,961	\$9,483,362	\$7,806,299	\$13,609,454	\$10,299,705
Los Angeles	\$12,369,869	\$12,370,856	\$10,419,585	\$11,720,103	\$7,449,296	\$7,755,367	\$10,127,396	\$8,444,020
Monterey Bay	\$15,349,357	\$40,255,321	\$7,555,779	\$21,053,486	\$9,938,197	\$40,824,876	\$6,707,002	\$19,156,692
Pomona	\$9,986,482	\$9,381,403	\$53,247,763	\$24,205,216	\$9,586,911	\$11,393,006	\$49,966,995	\$23,648,971
Sacramento	\$27,411,285	\$50,462,097	\$30,159,756	\$36,011,046	\$13,530,916	\$22,851,458	\$18,212,998	\$18,198,457
Sonoma	\$8,662,083	\$7,542,624	\$9,624,259	\$8,609,655	\$7,767,223	\$4,195,175	\$6,975,912	\$6,312,770
	<b>\$86,313,237</b>	<b>\$131,691,354</b>	<b>\$126,507,810</b>	<b>\$114,837,467</b>	<b>\$57,755,905</b>	<b>\$94,826,181</b>	<b>\$105,599,757</b>	<b>\$86,060,614</b>
<b>PEER GROUP 3</b>								
Fresno	\$27,602,828	\$32,949,805	\$28,397,838	\$29,650,157	\$20,811,957	\$25,177,931	\$26,416,541	\$24,135,476
Fullerton	\$28,200,665	\$37,012,931	\$62,437,326	\$42,550,307	\$13,844,163	\$26,680,435	\$60,584,690	\$33,703,096
Long Beach	\$38,909,500	\$37,687,176	\$44,539,565	\$40,378,747	\$16,364,275	\$28,417,444	\$19,937,046	\$21,572,922
Northridge	\$21,990,618	\$22,157,446	\$72,864,893	\$39,004,319	\$16,371,608	\$20,905,900	\$62,069,496	\$33,115,668
San Diego	\$111,209,307	\$105,849,850	\$123,540,150	\$113,533,102	\$89,466,049	\$82,747,912	\$106,551,004	\$92,921,655
San Francisco	\$59,922,610	\$31,658,503	\$16,576,113	\$36,052,409	\$53,274,551	\$19,018,161	\$21,052,864	\$31,115,192
San José	\$18,635,501	\$23,632,010	\$34,377,015	\$25,548,175	\$17,921,150	\$15,421,497	\$20,617,140	\$17,986,596
San Luis Obispo	\$117,390,671	\$157,423,672	\$37,366,758	\$104,060,367	\$38,890,734	\$46,547,354	\$62,029,261	\$49,155,783
	<b>\$423,861,700</b>	<b>\$448,371,393</b>	<b>\$420,099,658</b>	<b>\$430,777,584</b>	<b>\$266,944,487</b>	<b>\$264,916,634</b>	<b>\$379,258,042</b>	<b>\$303,706,388</b>
Chancellor's Office	\$6,131,442	\$2,965,993	\$5,997,057	\$5,031,497	\$5,976,978	\$3,856,362	\$4,234,389	\$4,689,243
<b>GRAND TOTAL</b>	<b>\$569,981,849</b>	<b>\$641,677,330</b>	<b>\$634,270,170</b>	<b>\$615,309,783</b>	<b>\$370,936,948</b>	<b>\$408,784,082</b>	<b>\$552,786,126</b>	<b>\$444,169,052</b>

Note: 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.

## PHILANTHROPIC PRODUCTIVITY



## GIFT COMMITMENTS

<b>PEER GROUP 1</b>	New Charitable Gifts	New Pledges	Revocable Deferred Gifts (Face Value)	Native American & Government Contributions	Total Gift Commitments	2020/2021 General Fund	Gift Commitments as a Percent of the General Fund
Bakersfield	\$3,441,649	\$5,021,404	\$0	\$0	\$8,463,053	\$83,536,000	10%
Channel Islands	\$16,865,659	\$1,697,688	\$1,607,000	\$0	\$20,170,347	\$85,534,000	24%
Dominguez Hills	\$2,210,784	\$2,051,592	\$4,040,000	\$17,989	\$8,320,365	\$103,393,000	8%
East Bay	\$2,516,295	\$3,966,354	\$525,000	\$0	\$7,007,649	\$101,656,000	7%
Humboldt	\$6,631,360	\$2,354,953	\$350,000	\$3,640	\$9,339,953	\$85,580,000	11%
Maritime Academy	\$11,877,263	\$173,400	\$0	\$0	\$12,050,663	\$34,443,000	35%
San Bernardino	\$3,165,509	\$810,082	\$5,000,000	\$91,701	\$9,067,292	\$129,724,000	7%
San Marcos	\$3,201,595	\$569,500	\$1,730,000	\$750	\$5,501,845	\$100,325,000	5%
Stanislaus	\$1,139,516	\$604,962	\$0	\$0	\$1,744,478	\$76,815,000	2%
	<b>\$51,049,630</b>	<b>\$17,249,935</b>	<b>\$13,252,000</b>	<b>\$114,080</b>	<b>\$81,665,645</b>	<b>\$801,006,000</b>	<b>10%</b>
<b>PEER GROUP 2</b>							
Chico	\$12,147,308	\$2,253,360	\$1,100,000	\$0	\$15,500,668	\$131,838,000	12%
Los Angeles	\$7,636,816	\$2,353,769	\$429,000	\$0	\$10,419,585	\$180,509,000	6%
Monterey Bay	\$5,462,100	\$2,073,294	\$20,000	\$385	\$7,555,779	\$81,378,000	9%
Pomona	\$46,816,440	\$2,177,323	\$4,254,000	\$0	\$53,247,763	\$158,003,000	34%
Sacramento	\$13,496,393	\$13,020,431	\$3,642,932	\$0	\$30,159,756	\$189,769,000	16%
Sonoma	\$5,616,677	\$1,486,027	\$1,696,555	\$825,000	\$9,624,259	\$73,129,000	13%
	<b>\$91,175,734</b>	<b>\$23,364,204</b>	<b>\$11,142,487</b>	<b>\$825,385</b>	<b>\$126,507,810</b>	<b>\$814,626,000</b>	<b>16%</b>
<b>PEER GROUP 3</b>							
Fresno	\$22,141,526	\$2,668,572	\$3,466,240	\$121,500	\$28,397,838	\$168,454,000	17%
Fullerton	\$58,570,108	\$2,604,297	\$1,257,765	\$5,156	\$62,437,326	\$208,911,000	30%
Long Beach	\$9,881,159	\$29,129,381	\$5,529,025	\$0	\$44,539,565	\$227,052,000	20%
Northridge	\$55,189,374	\$10,125,519	\$7,550,000	\$0	\$72,864,893	\$232,422,000	31%
San Diego	\$88,439,848	\$27,069,816	\$8,019,486	\$11,000	\$123,540,150	\$198,054,000	62%
San Francisco	\$11,166,168	\$2,819,045	\$2,590,901	\$0	\$16,576,113	\$179,928,000	9%
San José	\$13,356,584	\$13,025,337	\$7,995,094	\$0	\$34,377,015	\$173,637,000	20%
San Luis Obispo	\$27,900,878	\$5,341,275	\$4,124,605	\$0	\$37,366,758	\$141,830,000	26%
	<b>\$286,645,645</b>	<b>\$92,783,242</b>	<b>\$40,533,116</b>	<b>\$137,656</b>	<b>\$420,099,658</b>	<b>\$1,530,288,000</b>	<b>27%</b>
Chancellor's Office	\$2,997,057	\$3,000,000	\$0	\$0	\$5,997,057	\$148,334,000	4%
<b>GRAND TOTAL</b>	<b>\$431,868,066</b>	<b>\$136,397,381</b>	<b>\$64,927,603</b>	<b>\$1,077,121</b>	<b>\$634,270,170</b>	<b>\$3,294,254,000</b>	<b>19%</b>

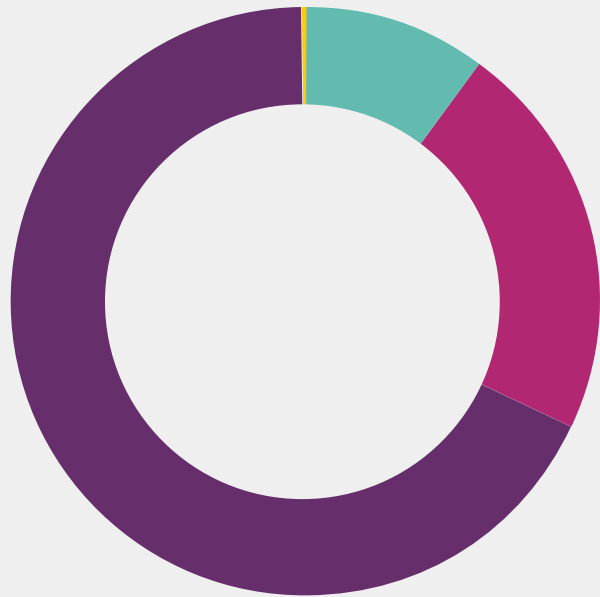
Note: Campuses in peer group 1 generally have fewer than 5,000 individual donors, fewer than 10 full-time professional fundraisers and less than \$25 million in endowment market value.

Campuses in peer group 2 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.

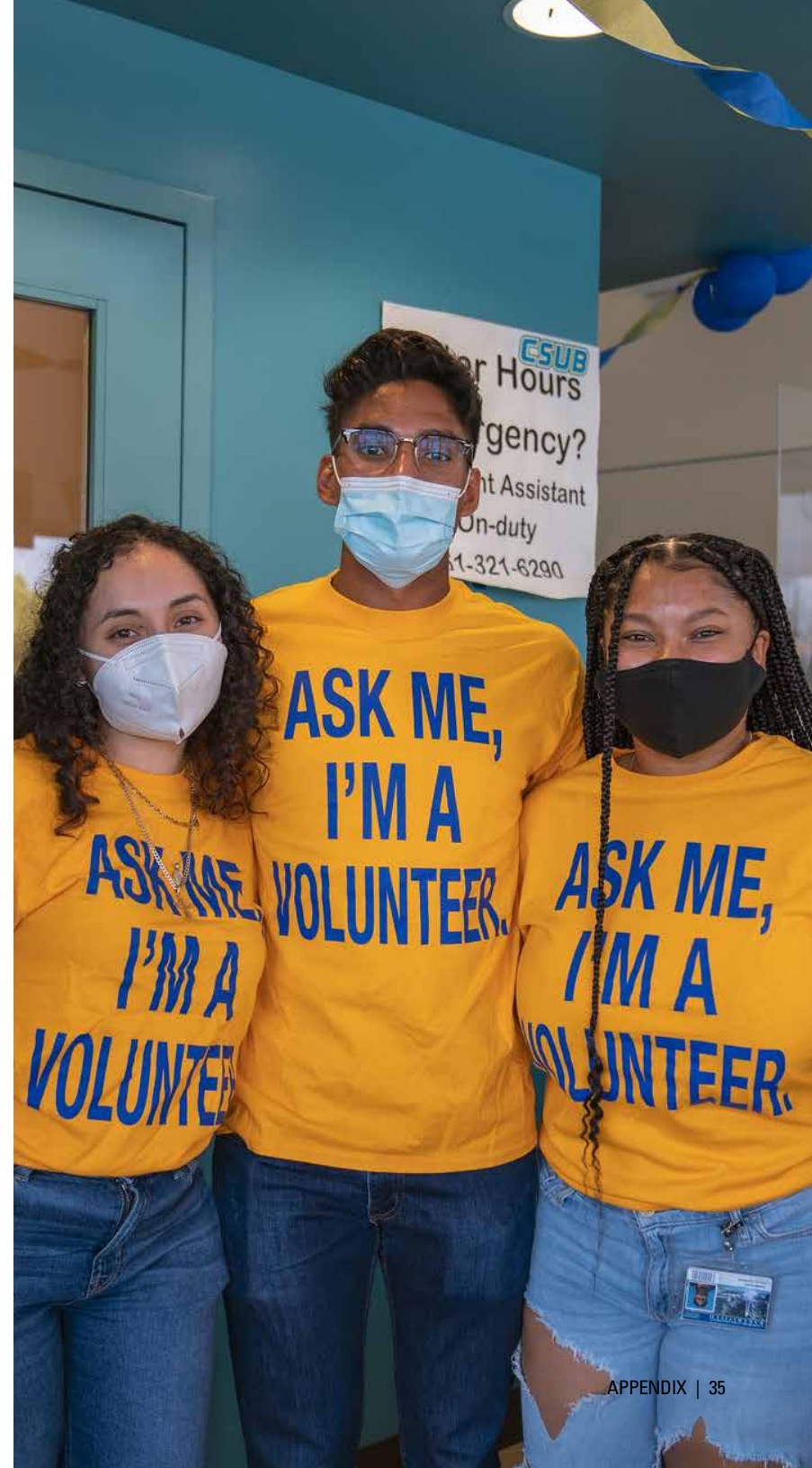
Campuses in peer group 3 generally have more than 10,000 individual donors, more than 20 full-time professional fundraisers and more than \$50 million in endowment market value.

Note: The 2020/2021 General Fund column was revised to exclude tuition and fee revenue.

## GIFT COMMITMENTS



- New Charitable Gifts **68.09%**
- New Pledges **21.50%**
- Revocable Deferred Gifts (face value) **10.24%**
- Native American and Government Contributions **0.17%**



## GIFT RECEIPTS BY SOURCE

PEER GROUP 1	INDIVIDUALS			ORGANIZATIONS			Gift Receipts Total	Total Number Individual Donors
	Alumni	Parents	Other Individuals	Foundations	Corporations	Other Organizations		
Bakersfield	\$424,187	\$3,484	\$838,437	\$1,790,375	\$2,226,597	\$1,177,178	\$6,460,258	1,221
Channel Islands	\$13,475	\$14,155	\$2,288,332	\$575,000	\$526,891	\$15,109,335	\$18,527,188	737
Dominguez Hills	\$188,516	\$3,058	\$1,732,469	\$619,860	\$1,866,412	\$120,705	\$4,531,020	1,553
East Bay	\$1,941,953	\$12,725	\$416,450	\$1,573,155	\$558,111	\$530,677	\$5,033,071	1,649
Humboldt	\$1,342,883	\$69,542	\$3,512,402	\$842,331	\$697,472	\$674,099	\$7,138,729	3,220
Maritime Academy	\$1,120,142	\$53,453	\$665,019	\$137,588	\$9,732,705	\$182,121	\$11,891,028	556
San Bernardino	\$275,015	\$128,972	\$1,777,292	\$902,606	\$599,452	\$324,363	\$4,007,700	2,121
San Marcos	\$83,648	\$67,785	\$1,279,429	\$1,666,243	\$943,436	\$287,109	\$4,327,650	2,041
Stanislaus	\$219,010	\$250	\$367,628	\$892,211	\$265,220	\$32,975	\$1,777,294	770
	<b>\$5,608,829</b>	<b>\$353,424</b>	<b>\$12,877,458</b>	<b>\$8,999,369</b>	<b>\$17,416,296</b>	<b>\$18,438,562</b>	<b>\$63,693,938</b>	<b>13,868</b>
<b>PEER GROUP 2</b>								
Chico	\$3,469,985	\$3,822,669	\$2,494,236	\$1,777,190	\$1,617,791	\$427,583	\$13,609,454	10,150
Los Angeles	\$2,628,398	\$1,980	\$869,269	\$2,662,103	\$2,556,588	\$1,409,058	\$10,127,396	2,450
Monterey Bay	\$47,351	\$19,926	\$2,117,663	\$2,122,523	\$1,559,606	\$839,933	\$6,707,002	10,612
Pomona	\$4,784,537	\$60,630	\$2,043,086	\$596,063	\$2,184,649	\$40,298,030	\$49,966,995	5,833
Sacramento	\$4,331,823	\$122,615	\$10,150,388	\$1,433,328	\$1,877,579	\$297,265	\$18,212,998	46,220
Sonoma	\$284,954	\$46,932	\$3,167,817	\$1,617,557	\$1,823,958	\$34,694	\$6,975,912	1,573
	<b>\$15,547,048</b>	<b>\$4,074,752</b>	<b>\$20,842,459</b>	<b>\$10,208,764</b>	<b>\$11,620,171</b>	<b>\$43,306,563</b>	<b>\$105,599,757</b>	<b>76,838</b>
<b>PEER GROUP 3</b>								
Fresno	\$5,040,216	\$134,990	\$3,738,910	\$9,702,409	\$5,125,326	\$2,674,690	\$26,416,541	9,953
Fullerton	\$2,232,138	\$290,757	\$3,142,877	\$8,827,558	\$4,317,310	\$41,774,050	\$60,584,690	17,179
Long Beach	\$3,053,072	\$3,167,073	\$5,898,725	\$2,323,683	\$2,352,212	\$3,142,281	\$19,937,046	16,260
Northridge	\$4,296,881	\$182,099	\$5,465,429	\$47,633,714	\$3,452,562	\$1,038,811	\$62,069,496	13,802
San Diego	\$20,315,054	\$1,156,584	\$40,308,202	\$18,838,063	\$10,690,756	\$15,242,345	\$106,551,004	78,194
San Francisco	\$7,043,757	\$21,863	\$3,182,421	\$5,678,542	\$3,433,533	\$1,692,748	\$21,052,864	3,968
San José	\$8,223,023	\$180,653	\$6,079,408	\$3,200,953	\$2,825,178	\$107,925	\$20,617,140	5,671
San Luis Obispo	\$7,454,793	\$1,365,031	\$7,334,015	\$15,011,916	\$10,344,691	\$20,518,815	\$62,029,261	10,422
	<b>\$57,658,934</b>	<b>\$6,499,050</b>	<b>\$75,149,987</b>	<b>\$111,216,838</b>	<b>\$42,541,568</b>	<b>\$86,191,665</b>	<b>\$379,258,042</b>	<b>155,449</b>
Chancellor's Office	\$0	\$0	\$30,155	\$2,839,250	\$1,267,884	\$97,100	\$4,234,389	81
<b>GRAND TOTAL</b>	<b>\$78,814,811</b>	<b>\$10,927,226</b>	<b>\$108,900,059</b>	<b>\$133,264,221</b>	<b>\$72,845,919</b>	<b>\$148,033,890</b>	<b>\$552,786,126</b>	<b>246,236</b>

Note: Number of individual donors includes alumni, parents, faculty, staff, students and friends of the university.

## GIFT RECEIPTS BY SOURCE



- Other Organizations **27%**
- Foundations **24%**
- Other Individuals **20%**
- Alumni **14%**
- Corporations **13%**
- Parents **2%**

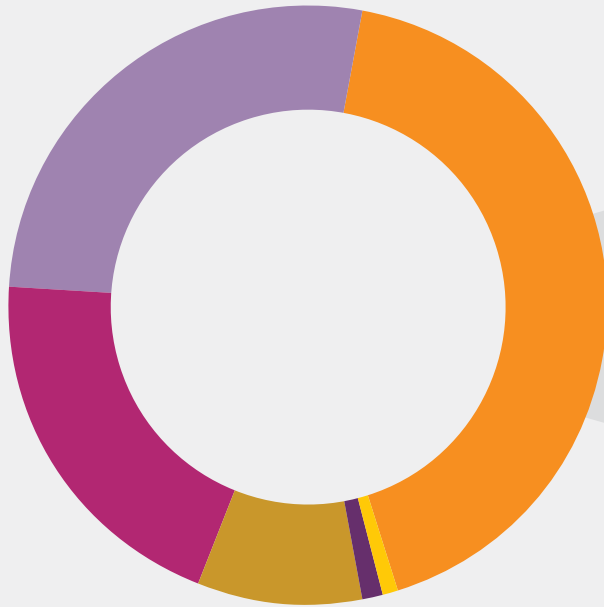


## GIFT RECEIPTS BY PURPOSE

	CURRENT PROGRAMS		CAPITAL PURPOSES			IRREVOCABLE DEFERRED GIFTS	
	Unrestricted	Restricted	Campus Improvements	Endowment		Present Value	Gift Receipts Total
			Property, Buildings and Equipment	Unrestricted	Restricted		
<b>PEER GROUP 1</b>							
Bakersfield	\$160,112	\$1,814,961	\$2,451,852	\$0	\$2,033,333	\$0	\$6,460,258
Channel Islands	\$15,270,989	\$1,837,941	\$1,117,490	\$0	\$300,768	\$0	\$18,527,188
Dominguez Hills	\$198,561	\$2,885,100	\$33	\$21,415	\$1,425,911	\$0	\$4,531,020
East Bay	\$109,372	\$4,303,146	\$47,937	\$0	\$572,616	\$0	\$5,033,071
Humboldt	\$168,094	\$3,480,974	\$2,015,000	\$50	\$1,036,132	\$438,479	\$7,138,729
Maritime Academy	\$9,681,410	\$842,128	\$717,070	\$0	\$650,420	\$0	\$11,891,028
San Bernardino	\$35,678	\$2,484,960	\$833,000	\$0	\$654,062	\$0	\$4,007,700
San Marcos	\$16,427	\$3,074,561	\$801,480	\$0	\$435,182	\$0	\$4,327,650
Stanislaus	\$2,498	\$1,680,364	\$0	\$0	\$94,432	\$0	\$1,777,294
	<b>\$25,643,141</b>	<b>\$22,404,135</b>	<b>\$7,983,862</b>	<b>\$21,465</b>	<b>\$7,202,856</b>	<b>\$438,479</b>	<b>\$63,693,938</b>
<b>PEER GROUP 2</b>							
Chico	\$327,965	\$4,637,237	\$3,439,614	\$1,549,360	\$3,655,278	\$0	\$13,609,454
Los Angeles	\$146,552	\$6,776,330	\$288,696	\$0	\$2,915,818	\$0	\$10,127,396
Monterey Bay	\$56,639	\$6,049,817	\$30,000	\$0	\$570,546	\$0	\$6,707,002
Pomona	\$40,143,156	\$5,890,665	\$443,378	\$0	\$2,988,116	\$501,680	\$49,966,995
Sacramento	\$281,474	\$12,390,236	\$1,413,768	\$0	\$4,127,520	\$0	\$18,212,998
Sonoma	\$63,222	\$3,392,167	\$72,188	\$0	\$3,448,335	\$0	\$6,975,912
	<b>\$41,019,008</b>	<b>\$39,136,452</b>	<b>\$5,687,644</b>	<b>\$1,549,360</b>	<b>\$17,705,613</b>	<b>\$501,680</b>	<b>\$105,599,757</b>
<b>PEER GROUP 3</b>							
Fresno	\$1,000	\$14,811,151	\$2,803,624	\$53,150	\$8,747,616	\$0	\$26,416,541
Fullerton	\$41,855,631	\$15,292,697	\$133,900	\$35,000	\$2,927,633	\$339,829	\$60,584,690
Long Beach	\$521,955	\$9,333,681	\$3,542,513	\$0	\$6,538,897	\$0	\$19,937,046
Northridge	\$40,095,055	\$11,274,777	\$342,873	\$2,501,288	\$7,758,881	\$96,622	\$62,069,496
San Diego	\$58,806	\$55,255,430	\$11,112,552	\$0	\$34,956,566	\$5,167,650	\$106,551,004
San Francisco	\$182,083	\$12,274,180	\$216,557	\$37,103	\$8,313,251	\$29,690	\$21,052,864
San José	\$92,324	\$11,677,495	\$500	\$111,829	\$8,627,245	\$107,747	\$20,617,140
San Luis Obispo	\$342,118	\$35,356,510	\$20,336,563	\$0	\$5,943,887	\$50,183	\$62,029,261
	\$83,148,972	\$165,275,921	\$38,489,082	\$2,738,370	\$83,813,976	\$5,791,721	\$379,258,042
Chancellor's Office	\$141,745	\$3,925,294	\$0	\$0	\$167,350	\$0	\$4,234,389
<b>GRAND TOTAL</b>	<b>\$149,952,866</b>	<b>\$230,741,802</b>	<b>\$52,160,588</b>	<b>\$4,309,195</b>	<b>\$108,889,795</b>	<b>\$6,731,880</b>	<b>\$552,786,126</b>

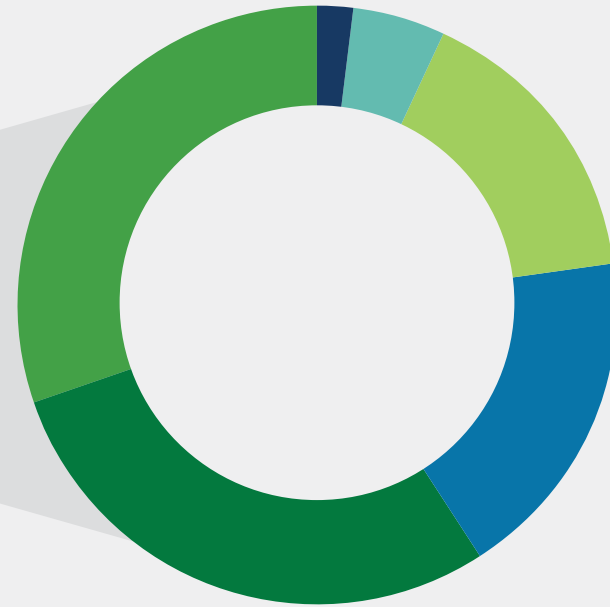


**GIFT RECEIPTS BY PURPOSE**



- Current Programs, Restricted **42%**
- Current Programs, Unrestricted **27%**
- Endowment, Restricted **20%**
- Property, Buildings and Equipment **9%**
- Irrevocable Deferred Gifts **1%**
- Endowment, Unrestricted **1%**

**GIFT RECEIPTS FOR CURRENT PROGRAMS, RESTRICTED**



- Faculty Support and Academic Enrichment **30%**
- Additional University Priorities **29%**
- Public Service Programs **18%**
- Student Scholarships **16%**
- Athletics **5%**
- Equipment and Facility Improvements **2%**



## PLANNED GIVING

	IRREVOCABLE DEFERRED GIFTS		REVOCABLE DEFERRED GIFTS	
	Face Value	Present Value	Face Value	Present Value
<b>PEER GROUP 1</b>				
Bakersfield	\$0	\$0	\$0	\$0
Channel Islands	\$0	\$0	\$1,607,000	\$1,504,399
Dominguez Hills	\$0	\$0	\$4,040,000	\$3,880,783
East Bay	\$0	\$0	\$525,000	\$215,448
Humboldt	\$468,977	\$438,479	\$350,000	\$305,660
Maritime Academy	\$0	\$0	\$0	\$0
San Bernardino	\$0	\$0	\$5,000,000	\$4,684,302
San Marcos	\$0	\$0	\$1,730,000	\$1,529,975
Stanislaus	\$0	\$0	\$0	\$0
	<b>\$468,977</b>	<b>\$438,479</b>	<b>\$13,252,000</b>	<b>\$12,120,567</b>
<b>PEER GROUP 2</b>				
Chico	\$0	\$0	\$1,100,000	\$596,833
Los Angeles	\$0	\$0	\$429,000	\$357,824
Monterey Bay	\$0	\$0	\$20,000	\$17,980
Pomona	\$850,435	\$501,680	\$4,254,000	\$1,552,496
Sacramento	\$0	\$0	\$3,642,932	\$2,481,655
Sonoma	\$0	\$0	\$1,696,555	\$1,538,984
	<b>\$850,435</b>	<b>\$501,680</b>	<b>\$11,142,487</b>	<b>\$6,545,772</b>
<b>PEER GROUP 3</b>				
Fresno	\$0	\$0	\$3,466,240	\$1,631,557
Fullerton	\$380,849	\$339,829	\$1,257,765	\$1,109,007
Long Beach	\$0	\$0	\$5,529,025	\$4,905,989
Northridge	\$212,473	\$96,622	\$7,550,000	\$4,320,179
San Diego	\$5,752,676	\$5,167,650	\$8,019,486	\$12,433,790
San Francisco	\$50,000	\$29,690	\$2,590,901	\$2,307,069
San José	\$233,760	\$107,747	\$7,995,094	\$6,781,750
San Luis Obispo	\$265,880	\$50,183	\$4,124,605	\$2,612,777
	<b>\$6,895,638</b>	<b>\$5,791,721</b>	<b>\$40,533,116</b>	<b>\$36,102,118</b>
Chancellor's Office	\$0	\$0	\$0	\$0
<b>GRAND TOTAL</b>	<b>\$8,215,050</b>	<b>\$6,731,880</b>	<b>\$64,927,603</b>	<b>\$54,768,457</b>

## ALUMNI

	Number of Addressable Alumni	Alumni Solicited	Alumni Donors	Total Alumni Contributions
<b>PEER GROUP 1</b>				
Bakersfield	54,101	19,748	454	\$424,187
Channel Islands	22,711	18,996	237	\$13,475
Dominguez Hills	106,920	103,735	1,217	\$188,516
East Bay	146,084	13,722	989	\$1,941,953
Humboldt	62,647	39,997	1,813	\$1,342,883
Maritime Academy	5,421	3,490	296	\$1,120,142
San Bernardino	103,800	59,672	1,105	\$275,015
San Marcos	54,928	39,500	747	\$83,648
Stanislaus	63,483	37,413	297	\$219,010
	<b>620,095</b>	<b>336,273</b>	<b>7,155</b>	<b>\$5,608,829</b>
<b>PEER GROUP 2</b>				
Chico	157,067	29,517	5,433	\$3,469,985
Los Angeles	180,356	176,936	2,105	\$2,628,398
Monterey Bay	24,707	22,145	522	\$47,351
Pomona	201,120	81,259	3,561	\$4,784,537
Sacramento	254,991	180,792	5,455	\$4,331,823
Sonoma	65,164	57,589	590	\$284,954
	<b>883,405</b>	<b>548,238</b>	<b>17,666</b>	<b>\$15,547,048</b>
<b>PEER GROUP 3</b>				
Fresno	210,370	99,124	5,907	\$5,040,216
Fullerton	292,027	257,455	10,475	\$2,232,138
Long Beach	338,425	135,143	5,746	\$3,053,072
Northridge	379,616	252,577	5,416	\$4,296,881
San Diego	491,389	227,273	17,532	\$20,315,054
San Francisco	310,621	7,909	1,939	\$7,043,757
San José	283,930	207,612	3,062	\$8,223,023
San Luis Obispo	220,821	67,042	4,771	\$7,454,793
	<b>2,527,199</b>	<b>1,254,135</b>	<b>54,848</b>	<b>\$57,658,934</b>
<b>GRAND TOTAL</b>	<b>4,030,699</b>	<b>2,138,646</b>	<b>79,669</b>	<b>\$78,814,811</b>



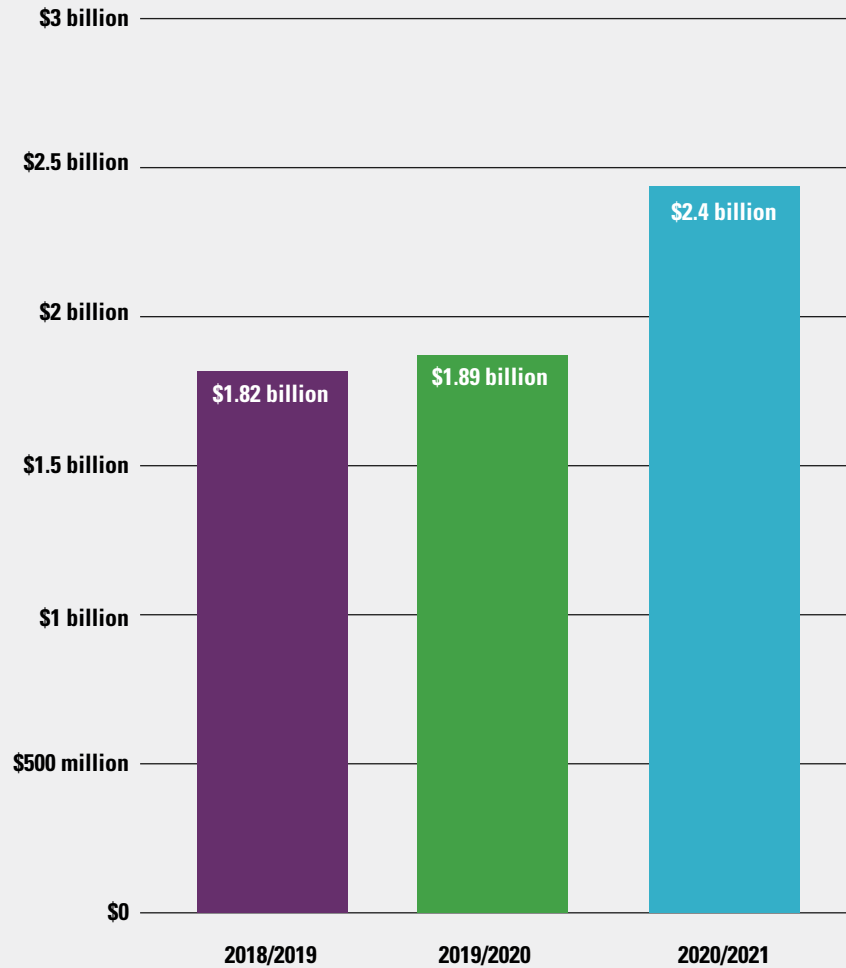
## ENDOWMENT

PEER GROUP 1	2018/2019 Market Value	2019/2020 Market Value	2020/2021 Market Value	2019/2020 to 2020/2021 Comparison		2020/2021 Investment Return Rate	Three- Year Average	Five- Year Average	Ten- Year Average	2020/2021 Gifts to Endowment	2020/2021 Endowment Distribution
				Amount	Percentage						
Bakersfield	\$25,474,074	\$26,944,055	\$36,234,619	\$9,290,564	34.48%	30.35%	11.41%	9.84%	7.25%	\$2,033,333	\$959,271
Channel Islands	\$16,049,730	\$15,625,255	\$19,808,229	\$4,182,974	26.77%	28.02%	12.88%	10.69%	7.86%	\$300,768	\$504,469
Dominguez Hills	\$12,542,519	\$13,067,588	\$18,285,969	\$5,218,381	39.93%	23.89%	11.13%	10.92%	8.25%	\$1,447,326	\$551,662
East Bay	\$17,838,030	\$16,876,939	\$20,704,912	\$3,827,973	22.68%	27.10%	8.80%	9.11%	6.99%	\$572,616	\$705,584
Humboldt	\$31,287,672	\$32,059,529	\$42,188,227	\$10,128,698	31.59%	29.67%	12.02%	11.25%	8.40%	\$1,036,182	\$1,350,036
Maritime Academy	\$9,246,845	\$10,726,358	\$13,514,934	\$2,788,576	26.00%	22.90%	7.43%	6.97%	4.96%	\$650,420	\$199,774
San Bernardino	\$41,117,664	\$44,939,032	\$55,591,997	\$10,652,965	23.71%	26.40%	10.37%	9.88%	7.08%	\$654,062	\$1,551,352
San Marcos	\$26,288,717	\$27,957,341	\$35,766,462	\$7,809,121	27.93%	32.20%	13.02%	12.14%	8.42%	\$435,182	\$1,058,147
Stanislaus	\$16,552,261	\$16,131,357	\$19,952,255	\$3,820,898	23.69%	26.77%	10.80%	9.34%	5.78%	\$94,432	\$211,560
	<b>\$196,397,512</b>	<b>\$204,327,454</b>	<b>\$262,047,604</b>	<b>\$57,720,150</b>	<b>28.25%</b>	<b>27.48%</b>	<b>10.87%</b>	<b>10.02%</b>	<b>7.25%</b>	<b>\$7,224,321</b>	<b>\$7,094,562</b>
<b>PEER GROUP 2</b>											
Chico	\$65,293,330	\$62,941,713	\$87,222,880	\$24,281,167	38.58%	35.60%	12.03%	10.92%	8.19%	\$5,204,638	\$2,241,231
Los Angeles	\$42,527,931	\$46,190,859	\$59,435,334	\$13,244,475	28.67%	25.01%	11.10%	9.83%	6.94%	\$2,915,818	\$1,653,533
Monterey Bay	\$27,083,828	\$27,497,544	\$35,272,666	\$7,775,122	28.28%	27.20%	10.70%	10.18%	7.80%	\$570,546	\$846,563
Pomona	\$101,598,664	\$105,450,164	\$166,520,297	\$61,070,133	57.91%	31.40%	12.66%	11.87%	7.81%	\$2,988,116	\$5,545,454
Sacramento	\$51,241,432	\$57,172,334	\$76,741,606	\$19,569,272	34.23%	31.47%	13.95%	11.66%	7.73%	\$4,127,520	\$2,092,794
Sonoma	\$52,281,185	\$52,739,462	\$64,536,295	\$11,796,833	22.37%	28.30%	12.07%	10.64%	6.72%	\$3,448,335	\$1,685,530
	<b>\$340,026,370</b>	<b>\$351,992,076</b>	<b>\$489,729,078</b>	<b>\$137,737,002</b>	<b>39.13%</b>	<b>29.83%</b>	<b>12.08%</b>	<b>10.81%</b>	<b>7.55%</b>	<b>\$19,254,973</b>	<b>\$14,065,105</b>
<b>PEER GROUP 3</b>											
Fresno	\$170,314,606	\$170,750,351	\$218,892,189	\$48,141,838	28.19%	28.48%	12.25%	10.65%	7.50%	\$8,800,766	\$7,212,018
Fullerton	\$68,754,849	\$81,744,364	\$104,414,541	\$22,670,177	27.73%	27.92%	12.45%	10.42%	7.12%	\$2,962,633	\$2,112,622
Long Beach	\$79,351,656	\$85,616,503	\$109,666,865	\$24,050,362	28.09%	26.36%	11.31%	10.69%	7.69%	\$6,538,897	\$3,902,174
Northridge	\$119,016,374	\$126,263,497	\$158,814,759	\$32,551,262	25.78%	21.39%	10.74%	10.30%	7.45%	\$10,260,169	\$4,372,270
San Diego	\$308,308,377	\$330,278,508	\$399,709,864	\$69,431,356	21.02%	16.30%	9.70%	9.70%	7.47%	\$34,956,566	\$11,789,090
San Francisco	\$137,080,484	\$140,759,249	\$183,539,721	\$42,780,472	30.39%	31.30%	12.07%	10.66%	8.27%	\$8,350,354	\$3,834,406
San José	\$153,212,205	\$148,747,339	\$197,133,502	\$48,386,163	32.53%	32.50%	12.43%	11.32%	8.12%	\$8,739,074	\$5,961,800
San Luis Obispo	\$227,678,094	\$226,105,393	\$287,263,400	\$61,158,007	27.05%	30.00%	12.17%	11.24%	8.06%	\$5,943,887	\$9,239,926
	<b>\$1,263,716,645</b>	<b>\$1,310,265,204</b>	<b>\$1,659,434,841</b>	<b>\$349,169,637</b>	<b>26.65%</b>	<b>26.78%</b>	<b>11.64%</b>	<b>10.62%</b>	<b>7.72%</b>	<b>\$86,552,346</b>	<b>\$48,424,306</b>
Chancellor's Office	\$25,106,297	\$27,828,185	\$35,285,110	\$7,456,925	26.80%	32.39%	13.14%	12.19%	8.29%	\$167,350	\$1,086,749
<b>GRAND TOTAL</b>	<b>\$1,825,246,824</b>	<b>\$1,894,412,919</b>	<b>\$2,446,496,633</b>	<b>\$552,083,714</b>	<b>29.14%</b>	<b>28.04%</b>	<b>11.53%</b>	<b>10.52%</b>	<b>7.51%</b>	<b>\$113,198,990</b>	<b>\$70,670,722</b>

Notes: Investment returns are reported as net of investment fees.

Notes: Peer group and university-wide investment returns are presented as equal-weighted averages.

## ENDOWMENT



ENDOWMENT MARKET VALUE

**\$2.4 BILLION**  
ENDOWMENT MARKET VALUE

**28%**  
AVERAGE INVESTMENT RETURN

**\$71 MILLION**  
ENDOWMENT DISTRIBUTION

**\$113 MILLION**  
NEW GIFTS TO ENDOWMENT



# 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 continuing 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

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.

### 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.

### PEER GROUP 1

Campuses categorized within group 1 generally have fewer than 5,000 individual donors, fewer 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 equivalent to 10 percent of the campus state budget.

### PEER GROUP 2

Campuses categorized within group 2 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 equivalent to 10 percent to 15 percent of the campus state budget.

### PEER GROUP 3

Campuses categorized within group 3 generally have more than 10,000 individual donors, more than 20 full-time professional fundraisers and more than \$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 with no restrictions 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 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 to retire debt.

### 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 campus has a reasonable means of contacting. It is within the discretion of each campus 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.



# THE CALIFORNIA STATE UNIVERSITY





**CSU** The California State University

*401 Golden Shore, Long Beach, CA 90802-4210*

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