

**CALIFORNIA STATE UNIVERSITY, LONG BEACH
2001-02 RESOURCE PLANNING PROCESS
FORM 3 - REQUEST FOR AUGMENTATION**

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<p>Smartcall Telefundraising Management System</p> <p>Under its current mode of operation, the Annual Fund Phonathon program has reached maximum capacity due to its size and maturity. In order to insure continuous growth of the program, both in dollars as well as donors, conversion to an automated system is recommended. This automated system will allow the program to:</p> <ul style="list-style-type: none"> • Increase the number of completed calls annually. (an additional 10,000 contacts) • Increase the amount of monies pledged annually. • Increase the efficiency of record management. • Increase the efficiency of managing campaigns as well as individual callers. • Create real-time statistical reports. <p>The Smartcall Telefundraising Management System would include: 20 caller workstations, file server, database engine software, initial licensing fee, installation and training service fee and requires annual license renewal fees of \$10,000.*</p> <p>A half-time position would assist the Annual Fund Coordinator in utilizing the SmartCall system to its fullest potential. Together with the recent information attained through the rating and screening of our Alumni and Development Records database, specialized campaigns will target our current donors and allow us to strategically approach our non-donors more effectively and efficiently. This additional support will also allow for the expansion of our direct mail efforts.</p> <p>This activity clearly relates to Planning Area VIII: Non-State Revenue, Mid-Range Goal 5.</p>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Permanent Funding</td> <td style="width: 10%; text-align: center;"><input checked="" type="checkbox"/></td> <td style="width: 30%; text-align: right;">(1)</td> </tr> <tr> <td>One Time, Non-Recurring Funding</td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: right;">(2)</td> </tr> <tr> <td>Previously Funded</td> <td style="text-align: center;"><input type="checkbox"/></td> <td></td> </tr> <tr> <td style="text-align: right;">FTEF</td> <td style="text-align: center;">#</td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">_____</td> </tr> <tr> <td></td> <td style="text-align: center;">\$</td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">_____</td> </tr> <tr> <td style="text-align: right;">SUPPORT POSITION (Staff and MPP)</td> <td style="text-align: center;">#</td> <td style="text-align: right;">.5</td> </tr> <tr> <td></td> <td style="text-align: center;">\$</td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">\$ 20,000 (1)</td> </tr> <tr> <td style="text-align: right;">OTHER PERSONAL</td> <td style="text-align: center;">\$</td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">\$10,000 (1)*</td> </tr> <tr> <td style="text-align: right;">OPER EXP/EQUIP</td> <td style="text-align: center;">\$</td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">\$ 97,600 (2)</td> </tr> <tr> <td style="text-align: right;">TOTAL</td> <td style="text-align: center;">#</td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">_____</td> </tr> <tr> <td></td> <td style="text-align: center;">\$</td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">\$ 127,600</td> </tr> </table> <p>University Mid-Range Goals Planning Area VIII Mid-Range Goal 5</p> <p>*Annual license renewal fees.</p> <p><u>Priority 1</u></p>	Permanent Funding	<input checked="" type="checkbox"/>	(1)	One Time, Non-Recurring Funding	<input checked="" type="checkbox"/>	(2)	Previously Funded	<input type="checkbox"/>		FTEF	#	_____		\$	_____	SUPPORT POSITION (Staff and MPP)	#	.5		\$	\$ 20,000 (1)	OTHER PERSONAL	\$	\$10,000 (1)*	OPER EXP/EQUIP	\$	\$ 97,600 (2)	TOTAL	#	_____		\$	\$ 127,600
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<p>Assistant University Webmaster</p> <p>This position is requested in order to expand the ability of Public Affairs to work cooperatively with all university divisions in developing, updating and/or rethinking individual web sites, as well as to provide assistance in continued development and maintenance of the university web site at the administrative levels. Public Affairs has worked to assist all divisions with important projects not directly related to the administrative levels of the web site, such as the campus Accountability Report, the upcoming WASC accreditation, and an on-line site available for donating to the university, which is currently being developed.</p> <p>Since the university webmaster/director of new media communications joined Public Affairs two years ago, the responsibilities and expectations of the position have expanded significantly. An unexpected and particularly time-consuming component to the department's web activities is assistance to divisions and departments in developing their own sites or in learning how to work with a variety of graphics and web construction tools. Webmasters from other divisions and departments—often students—are also given guidance on web site architecture and, as appropriate, federal directives on how information is to be provided, such as ADA compliance for web pages.</p> <p>The requested position would help the university webmaster complete a greater number of web projects without severely limiting his/her availability to campus departments on projects not directly involving the Office of Public Affairs.</p> <p>The position directly relates to Planning Area VIII: Non-State Revenue, Mid-Range Goal 5. Expansion of the university web site to better serve a broad audience ultimately benefits alumni contact, donations to the campus and media relations. It also relates in part to Planning Area V: Assessment, Quality and Accountability, in that on-line availability of WASC accreditation documents and data, and on-line dissemination of the campus Accountability Report, are assisted by the university webmaster.</p>	<table> <tr> <td>Permanent Funding</td> <td align="right"><input checked="" type="checkbox"/></td> </tr> <tr> <td>One Time, Non-Recurring Funding</td> <td align="right"><input type="checkbox"/></td> </tr> <tr> <td>Previously Funded</td> <td align="right"><input type="checkbox"/></td> </tr> <tr> <td>FTEF</td> <td align="right"># _____ \$ _____</td> </tr> <tr> <td>SUPPORT POSITION (Staff and MPP)</td> <td align="right"># <u>1</u> \$ <u>50,000</u></td> </tr> <tr> <td>OTHER PERSONAL</td> <td align="right">\$ _____</td> </tr> <tr> <td>OPER EXP/EQUIP</td> <td align="right">\$ _____</td> </tr> <tr> <td>TOTAL</td> <td align="right"># <u>1</u> \$ <u>50,000</u></td> </tr> </table> <p>University Mid-Range Goal Planning Area VIII Mid-Range Goal 5</p> <p><u>Priority 2</u></p>	Permanent Funding	<input checked="" type="checkbox"/>	One Time, Non-Recurring Funding	<input type="checkbox"/>	Previously Funded	<input type="checkbox"/>	FTEF	# _____ \$ _____	SUPPORT POSITION (Staff and MPP)	# <u>1</u> \$ <u>50,000</u>	OTHER PERSONAL	\$ _____	OPER EXP/EQUIP	\$ _____	TOTAL	# <u>1</u> \$ <u>50,000</u>
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<p>Alumni Programs Assistant</p> <p>This position is requested in order to continue the expansion of Alumni Chapters and Clubs programming. In 1999, a moratorium was placed on the chartering of new chapters due to the inability to properly staff additional chapters in an effective manner.</p> <p>As a result of overwhelming interest from our alumni and faculty to expand chapter programming, a proposal was submitted to the Office of the Chancellor. Through the CSU Advancement Fund, the Alumni Programs Assistant position was funded for FY '00-01. This position will allow us to build on the success of the Alumni Chapters and Clubs area through the formation of additional chapters as well as engaging our alumni through the creation of one-time events based on special interests.</p> <p>Building relationships with our alumni through this avenue has proven very successful in the development efforts for the University. Of our alumni who have become members of a particular chapter, over half have become donors to the University. Whereas, of the non-member alumni population, only 23% have become donors.</p> <p>This position directly relates to Planning Area VIII: Non-State Revenue, Mid-Range Goal 5. As proven in the Alumni Chapter and Clubs arena, this position will provide support which will allow for the creation and expansion of programs/events based on specific interests for our alumni constituency. As a result, this will broaden our contact with alumni, increase alumni involvement with the University and ultimately increase the fundraising efforts.</p>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Permanent Funding</td> <td style="width: 10%;"></td> <td style="width: 10%; text-align: center;"><input checked="" type="checkbox"/></td> <td style="width: 20%;"></td> </tr> <tr> <td>One Time, Non-Recurring Funding</td> <td></td> <td style="text-align: center;"><input type="checkbox"/></td> <td></td> </tr> <tr> <td>Previously Funded</td> <td></td> <td style="text-align: center;"><input type="checkbox"/></td> <td></td> </tr> <tr> <td style="text-align: right;">FTEF</td> <td>#</td> <td></td> <td>_____</td> </tr> <tr> <td></td> <td>\$</td> <td></td> <td>_____</td> </tr> <tr> <td style="text-align: right;">SUPPORT POSITION (Staff and MPP)</td> <td>#</td> <td style="text-align: center;">1</td> <td>_____</td> </tr> <tr> <td></td> <td>\$</td> <td></td> <td>\$ 27,000</td> </tr> <tr> <td style="text-align: right;">OTHER PERSONAL</td> <td>\$</td> <td></td> <td>_____</td> </tr> <tr> <td style="text-align: right;">OPER EXP/EQUIP</td> <td>\$</td> <td></td> <td>_____</td> </tr> <tr> <td style="text-align: right;">TOTAL</td> <td>#</td> <td style="text-align: center;">1</td> <td>_____</td> </tr> <tr> <td></td> <td>\$</td> <td></td> <td>\$ 27,000</td> </tr> </table> <p>University Mid-Range Goals Planning Area VIII Mid-Range Goals 5</p> <p><u>Priority 3</u></p>	Permanent Funding		<input checked="" type="checkbox"/>		One Time, Non-Recurring Funding		<input type="checkbox"/>		Previously Funded		<input type="checkbox"/>		FTEF	#		_____		\$		_____	SUPPORT POSITION (Staff and MPP)	#	1	_____		\$		\$ 27,000	OTHER PERSONAL	\$		_____	OPER EXP/EQUIP	\$		_____	TOTAL	#	1	_____		\$		\$ 27,000
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<p>Advancement Fellow</p> <p>This position will focus on training of a recent CSULB graduate in the area of university advancement, specifically fundraising. It is anticipated that the individual will enroll in a graduate program and make a two year commitment to the Division. The incumbent, under the supervision of the Vice President for University Relations and Development and the Assistant Vice President for Development Administration, will participate in a structured program to be exposed to all of the functional areas of the advancement program and after a period of review, be assigned a group of individuals to cultivate and engage in the priorities of the University. The ultimate anticipated outcome will be the Fellow's appointment is a full-time professional with the division.</p> <p>This position relates to Planning Area VIII: Non-State Revenue, Mid-Range Goals 4 and 5. The recruitment and training of individuals, who have strong ties to the University, will enable the Division to form closer relationships with alumni to engage them in our philanthropic mission. By expanding the available pool of qualified fundraising professionals, the University will be able to both expand the personal and direct contact with a larger number of our alumni population and to increase the number of those individuals who are qualified as major gift prospects and subsequently endowment prospects. Who better to contact and develop relationships with our alumni and donor population than one of our own graduates.</p>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Permanent Funding</td> <td style="width: 5%;"></td> <td style="width: 10%; text-align: center;"><input checked="" type="checkbox"/></td> <td style="width: 25%;"></td> </tr> <tr> <td>One Time, Non-Recurring Funding</td> <td></td> <td style="text-align: center;"><input type="checkbox"/></td> <td></td> </tr> <tr> <td>Previously Funded</td> <td></td> <td style="text-align: center;"><input type="checkbox"/></td> <td></td> </tr> <tr> <td>FTEF</td> <td>#</td> <td></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;"></td> </tr> <tr> <td></td> <td>\$</td> <td></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;"></td> </tr> <tr> <td>SUPPORT POSITION (Staff and MPP)</td> <td>#</td> <td style="text-align: center;">1</td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;"></td> </tr> <tr> <td></td> <td>\$</td> <td></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">\$ 40,000</td> </tr> <tr> <td>OTHER PERSONAL</td> <td>\$</td> <td></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;"></td> </tr> <tr> <td>OPER EXP/EQUIP</td> <td>\$</td> <td></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;"></td> </tr> <tr> <td>TOTAL</td> <td>#</td> <td style="text-align: center;">1</td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;"></td> </tr> <tr> <td></td> <td>\$</td> <td></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">\$ 40,000</td> </tr> </table> <p>University Mid-Range Goals Planning Area VIII Mid-Range Goals 4 and 5</p> <p><u>Priority 4</u></p>	Permanent Funding		<input checked="" type="checkbox"/>		One Time, Non-Recurring Funding		<input type="checkbox"/>		Previously Funded		<input type="checkbox"/>		FTEF	#				\$			SUPPORT POSITION (Staff and MPP)	#	1			\$		\$ 40,000	OTHER PERSONAL	\$			OPER EXP/EQUIP	\$			TOTAL	#	1			\$		\$ 40,000
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