

CSUSB FOUNDATION

Building a Culture of Philanthropy

**CSUSB Philanthropic Foundation
Board of Directors Meeting & Board Advance
March 1, 2025**

Saturday, March 1

7:30 - 8:30 a.m. Continental Breakfast

8:30 – 8:50 a.m. **Welcome, William Stevenson, Board Chair**

- Approval of December 4, 2024, Minutes
- Approval of Retreat Agenda and Consent Calendar:
 - Advocacy & Community Relations Report
 - Alumni Association Report
 - Philanthropy Committee Report

Foundation Committee Reports

- Investment Committee, Gary McBride
 - Action: Board approval for Investment Consultant or OCIO candidate
- Board Membership Committee, Shanthi Srinivas

8:50 a.m.- 9:10 a.m. **CSUSB: Opportunities & Challenges in 2025-26, President Tomás D. Morales**

9:10 a.m.- 10: 10 a.m. **Board Study Session – Enrollment Management, Facilitator, Shanthi Srinivas, Chair, Board Membership Committee**

What is the Board's Role in Enrollment Management & Retention?

Overview of Enrollment Management and Student Success: Challenges & Opportunities
Colleges and universities nationwide are experiencing demographic shifts and enrollment declines. This session will provide an overview of these challenges and their impact on CSUSB and the Palm Desert Campus. The board will review the university's enrollment strategy and explore ways to support student retention and success.

- David Dufault Hunter, Vice President Enrollment Management & Strategic
- Nefertiti Long, Vice Chair, CSUSB Philanthropic Foundation
- Lou Monville, Chair, Advocacy Committee, CSUSB Philanthropic Foundation (?)

- Diego Rendon, ASI, Executive Vice President

10:10 a.m. Break

10:30 a.m. – 11:30 a.m. **Role of CSUSB Foundation Board on Advocacy, Facilitator, Robert Nava**

The Foundation Directors can be the most persuasive advocates and ambassadors on behalf of CSUSB in engaging elected officials at the local, state, and federal levels. This session will help board members further understand the challenges when our core mission is challenged, and what tools and skills are needed for advocacy opportunities when call to actions and informal communications occur. Specific focus will be given on the CSUSB Federal and State Advocacy timeline and opportunities for board members engagement.

- Karen Serrano, Foundation Emeritus member
- Lou Monville, Advocacy Committee, Chair
- Marisa Yeager, AVP, Government, Community and Tribal Relations
- Carson Fajardo, ASI President

11:30am -12:15 p.m. **Lunch – Individual Roundtable Discussion on Board Engagement with Student Success and Advocacy**

12:15pm-1:15 p.m. **Completing the Our Defining Moment Campaign and Looking Forward, Rod Hendry, Chair, Philanthropy Committee**

This interactive session will help board members better understand the collective needs for the “final push” to complete the Our Defining Moment Campaign while leaving our pipeline of donors and prospective donors ready for future philanthropy. Specific focus will be given to the most strategic areas where our pipeline and our institutional goals best overlap.

CSUSB leaders will engage in round table discussions on their respective college/campus fundraising priorities.

1. College of Arts & Letters, Rueyling Chuang, Dean
2. College of Natural Sciences, Sastry Pantula, Dean
3. College of Social & Behavioral Sciences, Christina Hassija, Dean
4. Jack H. Brown College of Business & Public Administration, Tomas Gomez Arias, Dean
5. Palm Desert Campus, Edna Martinez, AVP, Palm Desert Campus
6. Student Affairs, Paz Olivérez, Vice President for Student Affairs
7. Watson College of Education, Chinaka DomNwachukwu, Dean

1:15-3:15 p.m.

Board Exercise: Developing a 30 Second Elevator Pitch for the CSUSB Philanthropic Foundation

John Gumas, Gumas Advertising, Inc. & Foundation Board Member, San Francisco State Foundation

John Gumas is the CEO and founder of Gumas, a full-service branding, advertising, and digital marketing firm he established in 1984. A leading expert in Challenger Brand Marketing, he authored the bestselling books “Challenger Brand Marketing” and “Marketing Smart”. Gumas’ expertise has made him a sought-after speaker, an adjunct professor in branding, advertising, and interactive marketing, and a regular columnist for numerous publications and blogs.

- As a group, we will go through a structured marketing process to write our perfect elevator pitch. Together and in small break-out groups, we will articulate who we are, what we do, what makes us special and how do we make a difference in our community.

3:15 - 3:30 p.m.

Closing Comments & Adjournment

- Robert Nava
- President Morales
- Bill Stevenson