

CSUSB FOUNDATION

Building a Culture of Philanthropy

CSUSB Philanthropic Foundation Board

Retreat Agenda

Saturday, March 12, 2022

10:00 a.m. - 4:00 p.m.

Reception 4:00 - 5:00 p.m.

**Santos Manuel Student Union North
Conference Center, Second Floor**

10:00 a.m. Introduction to Retreat Program and Goals Conference Room A

Our Defining Moment: The Campaign for CSUSB, Robert Nava

10:15 a.m. Building Momentum for the Campaign

Retreat Facilitator - Lori Redfearn, Assistant Vice Chancellor, CSU System Wide Advancement

Lori will provide an overview of philanthropy in the CSU System. She will lead a conversation on the importance of the foundation board in helping to advance the university's priorities and how successful campaigns can help transform a foundation board and its fundraising capacity.

Break

10:45 a.m. - noon The Framework for the Campaign for CSUSB Conference Room A

Facilitator: Lori Redfearn

The campaign's primary purpose is to significantly increase philanthropic support, acquire new donors, tell the University's story and increase its visibility throughout the region, state and nation. The campaign will build support and investment in four major areas: 1) student support; 2) faculty support, 3) program support; and 4) capital improvements. Members of the university's leadership will discuss the major themes and opportunities for the campaign.

- I. Enhancing the Student Experience and Support: Paz Olivérez, Vice President, Student Affairs
- II. Faculty Support and Development: Shari McMahan, Provost and Vice President, Academic Affairs

- III. Special Initiatives and Program Support: Sam Sudhakar, Vice President, Information Technology Services
- IV. Capital Support: Jenny Sorenson, Senior Associate Vice President Facilities Planning and Management

Break

12:15 p.m. - 1:30 p.m. Lunch & Program Conference Room A

The Director's Role in a Campaign: President Morales will facilitate a conversation with Dr. James Appleton, President Emeritus, University of Redlands, and Dr. James Erickson, Vice Chancellor Emeritus, UCR

A successful campaign requires collaboration and interface among three primary constituent groups: institutional leadership, key volunteers, and advancement staff. The discussion will focus on the vital support role of foundation board members which is amplified during a fundraising campaign. The case for supporting the university and fundraising priorities is enhanced when engagement with a prospective donor is facilitated by a volunteer with the campus leadership.

Break

1:45 - 3:15 p.m. Interactive Campaign Priorities Poster Exercise Conference Center Lobby/Pre-function Space

This will be an interactive session. Twelve stations will be set up with posters highlighting college programs and priorities. Each presenter will have 2 minutes to highlight their priorities and then 6 minutes to interact with and answer questions from the directors. We will have a timer that will move groups to the next poster.

1. College of Natural Sciences: Sastry Pantula, Dean
2. Pfau Library: Cesar Caballero, Dean
3. Jack H. Brown College of Business: Shanthi Srinivas, Interim Dean
4. College of Social & Behavioral Sciences: Rafik Mohamed, Dean
5. College of Education: Chinaka DomNwachukwu, Dean
6. Student Affairs: Paz Olivérez, Vice President for Student Affairs

7. College of Arts and Letters Arts: Rueyling Chuang, Dean
8. College of Extended and Global Education: Tatiana Karmanova, Dean
9. Palm Desert Campus: Jake Zhu, Dean
10. Athletics: Shawn Chin-Farrell, Director
11. University Initiatives: Honors Program, David Marshall, Faculty Director
12. University Initiatives: Alumni Relations, Crystal Wymer-Lucero, Director

3:15 p.m. Open Forum
Conference Room A

Lori Redfearn - The closing session will provide the directors time to provide feedback on the retreat and the vision and plan for the campaign. The facilitators will pose the question on how the directors can participate meaningfully in the campaign.

3:45 p.m. Closing Remarks
Conference Room A

President Morales
Bill Stevenson, Vice Chair

4:00 – 5:00 p.m. Reception
Conference Center Lobby/Pre-function Space