



**SACRAMENTO STATE ALUMNI ASSOCIATION
BOARD OF DIRECTORS ORIENTATION
August 30, 2021**

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HISTORY AND BACKGROUND

1. MISSION

“The mission of the Sacramento State Alumni Association is to connect, engage and celebrate alumni, students and friends of Sacramento State while building lifelong relationships that support the future of our University.”

Alumni Association By-laws Article II, Section 1

2. OVERVIEW

The Alumni Association is uniquely situated in its role in developing community support by building long-lasting relationships with current and future alumni through special events, student outreach, and community involvement. Building and fostering strong and effective alumni and community relations is accomplished by connecting alumni and community to the University through communications, events, and programs.

According to surveys, our more than 255,000 alumni are immensely grateful for the high-quality education they received at our institution. The region views the University as a major asset. The Alumni Association fosters a greater connection among alumni in the greater Sacramento region and beyond by communicating our profile of excellence to the public within and beyond the Sacramento region.

The Alumni Relations and Sacramento State Alumni Association staff are responsible for serving the needs of our alumni/members as well as the campus community and the region furthering the goals of the University.

3. HISTORY

“On December 6, 1949, President Guy A. West sent a memorandum to Dean of Students, Dr. Donald W. Bailey, saying, ‘Is it too early to begin thinking about the problem of keeping track of our alumni and possibly preparing some kind of organization for them? What suggestions have you to offer?’” (*A Brief Overview of the CSUS Alumni Association 1950-1980*, by R. Harold Van Cleave)

Thus began the formal discussion regarding the establishment of an Alumni Association for Sacramento State College, as it was then called. A set of by-laws was drafted early in 1950 by a group of graduates and was adopted by the association membership on July 20, 1950, with the primary role being to enhance the excellence of the College and provide a bridge between the College and the community it serves. Mr. Dave Morse was elected the Association’s first president to serve a two-year term. The Student Council and the Alumni Board exchanged non-voting members so the two groups could coordinate their activities and programs. An Associated Students, Inc. member, typically the President, still serves on the Alumni Association Board of Directors today.

In the first few years of existence, the Alumni Association inaugurated many tangible as well as intangible benefits for our alums. Among them were a campus directory of all graduates, students, faculty and staff; "The Alumni News" was published; a promotional brochure was produced for the Association; Alumni Grove was developed by Mr. Warren McClaskey and other alums; and the "Top 20 Club" (later changed to Alumni Campus Advancement Awards) was begun to honor the top twenty seniors; and, student scholarships were awarded. In addition, the Association supported class reunions; student receptions; and other programs and projects that served the university. The Alumni Association assisted the Student Association in obtaining the horseless carriage still used as a trophy for the annual Hornet vs. UC Davis football games.

The Statesman twenty year anniversary yearbook published in 1967, stated that "Progress from a barren campus site to a thriving academic community marks the first twenty years of Sacramento State College [as it was then called] history....Dr. Guy A. West, President of SSC throughout the first eighteen years, directed its rapid growth and was on hand to witness the many firsts in its history." The growth on the campus was naturally reflected in the growth of the Alumni Association. However, all was not well during the turbulent 1960's and '70's. George S. Craft, Jr. reports in his book, *California State University, Sacramento – The First Forty Years 1947-1987*, that "the Alumni Association languished in the 1960's and 1970's" due in large part to well-publicized squabbles between administrators and faculty. These were turbulent times in the history of our nation and it was reflected on campus as well.

However, Alumni Directors Harold Van Cleave and Ray Clemons conducted programs which kept the Association alive and active. In 1972 a creative distinguished service award program was established known as *The Order of the Hornet*, the highest award given by the University and the Alumni Association. In 1987 the program evolved into the Distinguished Service Awards conferred annually while the Order of the Hornet is still occasionally given to alums. (See History of the Distinguished Service Awards following.)

The decade of the 1990's saw an increase in interest in the Alumni Association. Many people worked long and hard over the next ten years to see the Sacramento State Alumni Association achieve its goal in 2000 of owning a permanent building on campus that serves as the meeting place for all alums. In April of 2015, the CSU Board of Trustees approved the naming of the building as the Leslie and Anita Harper Alumni Center, a versatile and picturesque setting with more than 4,000 square feet of event space lending itself nicely to gracious entertaining for small to very large groups. The Harper Alumni Center also includes an outside patio on the north side of the building, which was added in 2009, that further enhances alumni gatherings.

4. TIMELINE

1950

- ✓ Sacramento State Alumni Association established and By-Laws adopted
- ✓ Mr. Dave Morse elected first President of Association
- ✓ Sponsored first Homecoming in the fall
- ✓ Sponsored open-house event in spring
- ✓ Initiated weekly news items about or of interest to alums in State Hornet

1953

- ✓ First Homecoming on the J Street campus
- ✓ Alumni Grove developed
- ✓ Top 20 Club established to honor top twenty graduating seniors
- ✓ Award plaque given to Most Outstanding Senior
- ✓ Printed first campus directory of all graduates, students, faculty and staff
- ✓ Published “The Alumni News”

1954

- ✓ Commitment was made by Board Officers to: bring in new members; have a really active group; and run concise, time-sensitive meetings

1955

- ✓ First Class Reunion held for Class of 1950
- ✓ Established \$100 Scholarship for the winner of the annual Science Fair
- ✓ First scholarship awarded to prospective student nominated by alumni

1956

- ✓ Financed a faculty recruitment brochure
- ✓ Published a student research paper on northern California history
- ✓ Sponsored receptions for graduates
- ✓ Founded and funded the “Hornet, Inc. Shop” on campus

1957

- ✓ First graduating high school senior scholarship awarded
- ✓ Alumni Association Science Fair Scholarship awarded
- ✓ A 30-piece Alumni Orchestra provided music for the Homecoming Show
- ✓ Hosted Alumni banquet and dance for homecoming

1958

- ✓ Board members hosted the reception for summer graduates
- ✓ Alumni Association served as host to summer session “get-acquainted hour”

1959

- ✓ Alumni Association mailed “non-census” questionnaire to 1949 and 1950 grads

1960

- ✓ Participated in establishment of the Council of California State College Alumni Associations to support the state's education Master Plan
- ✓ Alumni Grove improvements were completed with dance floor and lighting added

1961

- ✓ Sponsored Homecoming shows for several years with all alumni casts and alumni dinners after the football games which were always well attended events.

1962

- ✓ Alumni Association By-Laws updated
- ✓ Alumnae invited to join prestigious American Association of University Women

1963

- ✓ "Top 20 Awards" renamed to "Alumni Campus Advancement Awards" to honor more students

1964

- ✓ Alumni invited to host international students during summer program

1965

- ✓ Alumni Association participated in homecoming activities including the: Alumni Banquet; Queen's Breakfast, a golf tournament and variety show

1966

- ✓ Scholarship Committee added another scholarship, bringing total to five
- ✓ New Engineering Chapter began with 33 members

1967

- ✓ First woman President of the Alumni Association, Ann Cornelius Reardon
- ✓ Dedication of the Guy A. West Memorial Bridge

1968

- ✓ Monthly dinners at private homes were held including alums, student leaders and faculty representatives to foster informal chats about a variety of issues
- ✓ Alumni were very pleased with new college policy that all offices are to remain open for business during the lunch hour

1969

- ✓ Alumni Association supports first EOP student
- ✓ School of Nursing Chapter established
- ✓ Funds were allocated for repairs and improvements to Alumni Grove

1970

- ✓ Revitalized Board of Directors was installed and several new programs were initiated in the 1970's, including:
 - Sponsored trips abroad
 - Faculty/alumni forums
 - Insurance programs
 - Sunday Suppers
 - Vacation trips to Camp Sacramento
 - Educational courses through Continuing Education
 - Fundraising programs
 - Social events on campus
 - Initiated new membership development program
 - New mailing list of graduates and friends of the University

1971

- ✓ Alumni-faculty forums sponsored
- ✓ Established the Dean Donald W. Bailey Student Loan Fund
- ✓ Instituted an annual giving program for alumni and friends of the University
- ✓ Sponsored a recognition day for campus scholars

1972

- ✓ Established the Order of the Hornet award to recognize distinguished alumni
- ✓ Established Alumni Annual Giving Program

1973

- ✓ Group auto insurance discount rate offered to Alumni Association members
- ✓ Alumni Association co-hosted Night at the Harness Races

1974

- ✓ "Capital Campus Alumni" magazine published

1975

- ✓ Business and professional memberships were initiated
- ✓ Board of Directors committed to a new Statement of Objectives
- ✓ Internal organization of the Association was streamlined
- ✓ Association became actively involved in advocacy around legislation affecting campus

1976

- ✓ "The Statesman" senior yearbook was re-instituted
- ✓ Two new publications were designed: "Alumitems" and "Alma Mater"
- ✓ Updated computerized information on all graduates
- ✓ 1976 calendar was developed as a fundraising venture
- ✓ Board was reorganized into working committees

1977

- ✓ School of Engineering chartered first campus-wide chapter for students and alumni
- ✓ Raised funds for improvement of alumni grove
- ✓ Provided mediation services to faculty and administration
- ✓ Served on search/selection committees for new University president

1978

- ✓ The Alumni Association Chapters were conceived and chartered for:
 - Athletics
 - Theater Arts
 - Recreation and Park Administration

1979

- ✓ Alumni Association Chapters were chartered for:
 - Home Economics
 - Media Departments
 - School of Social Work

1980

- ✓ Chapter chartered for Division of Nursing

1984

- ✓ President Gerth commits to raising alumni and community awareness of Sacramento State

1985

- ✓ A Student Scholarship program was instituted
- ✓ Improvements were made in the data processing system

1986

- ✓ Alumni Grove was refurbished
- ✓ More than 15,000 “lost” alumni were found
- ✓ An independent evaluation of the alumni program was conducted
- ✓ Sponsored a hospitality booth at the PCAA and PAC-10 Rowing Championships

1987

- ✓ Five incoming freshmen scholarships awarded
- ✓ Celebrated 40th Anniversary of University with special events
- ✓ Commissioned a painting by Wayne Thiebaud featured on the commemorative 40th Anniversary wine bottle
- ✓ Newsletter produced quarterly
- ✓ Mainframe software system installed to maintain alumni records

1988

- ✓ Graduate scholarships awarded
- ✓ First Alumni Directory published
- ✓ First annual Alumni College which drew more than 150 alumni to hear faculty members discuss their research
- ✓ Plans to build an alumni center on campus were included as part of the Master Plan
- ✓ Chapter was chartered for the second international chapter in Hong Kong
- ✓ Plans for chartering new chapters in anthropology, computer science, economics and journalism

1989

- ✓ Alumni Center project gains momentum; \$100,000 set aside for campaign
- ✓ Established a Membership Development position

1990

- ✓ The Board took the next steps in pursuit of the Alumni Center
- ✓ Hired a full-time Membership Development Coordinator

1991

- ✓ Voted and approved the construction of the Alumni Center Building
- ✓ Instituted “Life after Graduation” in the Sac State newspaper
- ✓ Substantially increased networking opportunities
- ✓ Alumni representative spoke at commencements for the first time
- ✓ Completed first Strategic Plan
- ✓ Established seven new chapters

1992

- ✓ Final vote to go ahead with the Alumni Center was taken and approved
- ✓ Published Alumni Directory
- ✓ Revised Bylaws
- ✓ Created Strategic Plan
- ✓ Established “Legislative Liaison” position to Alumni Council

1993

- ✓ CSUS Board of Trustees approved Alumni Center project
- ✓ Alumni Center architect selected

1994

- ✓ Alumni Center fundraising campaign launched
- ✓ Schematic drawings presented to Alumni Council

1995

- ✓ Launched Primary Gifts video and brochure

1996

- ✓ Final phase of fundraising for the Alumni Center

8/30/2021

1997

- ✓ Board approved the loan to finance the Alumni Center

1998

- ✓ Devised a cost-cutting plan to cut a \$40,000 association deficit and end the year with a \$4,000 profit
- ✓ Broke ground on the new Alumni Center

1999

- ✓ Alumni Center under construction

2000

- ✓ Completed construction and opened the new Alumni Center
- ✓ Hosted Nike and their athletes for the Olympic Track and Field Trials
- ✓ 50th Anniversary year of the Alumni Association
- ✓ Hosted Nike athletes during U.S. Olympic Track and Field Trials
- ✓ New Association logo and 50th Anniversary logo designed

2001

- ✓ Expanded Board of Directors to 33 members
- ✓ Added one full-time and one half-time staff positions
- ✓ Initiated pre-game parties
- ✓ Re-instituted scholarship program
- ✓ Adoption of a 3 year Strategic Plan
- ✓ Established Breakfast Club and Workplace Luncheons
- ✓ Partnered with each College Dean

2003

- ✓ 50th Causeway Classic football game played
- ✓ Alumni Association launches first website

2006

- ✓ April officially named as “Alumni Month”
- ✓ Sacramento State celebrates 60th Anniversary

2007

- ✓ New Hornet Bookstore dedicated
- ✓ Doctorate of education degree launched
- ✓ Sokiku Nakatani Tea Room and Garden opens
- ✓ Awarded full NCAA Division 1 certification

2008

- ✓ Marching band celebrates 50 years
- ✓ Broad Athletic Fieldhouse opens
- ✓ Digital sign on Highway 50 debuts

2009

- ✓ Built Patio on the north side of the Alumni Center
- ✓ Launched the Student Alumni Association
- ✓ American River Courtyard residence hall completed

2010

- ✓ New recreation and wellness center, The WELL, opens
- ✓ Destination 2010 initiative successfully completed

2011

- ✓ Hornet football defeat Pac-12 school, Oregon State
- ✓ School of Nursing moves to their new home in Folsom Hall
- ✓ Residence hall dining commons renovated
- ✓ The Hornets Policy & Politics Alumni Chapter chartered

2012

- ✓ Doctor of Physical Therapy becomes the school's second doctorate program
- ✓ Launched first international degree program, an international Master of Business Administration in Singapore
- ✓ Professor Richard Savino nominated for a Grammy

2013

- ✓ Sacramento State names new provost, Frederika "Fraka" Harmsen
- ✓ Sacramento State develops new strategic plan and master plan
- ✓ University Advancement joins the Giving Tuesday movement
- ✓ Published an Alumni Directory

2014

- ✓ Sacramento State hosts the 2014 USA Track and Field Outdoor Championships
- ✓ The Public Policy and Administration program celebrates its 25th anniversary
- ✓ The Foreign Languages Alumni and GE Honors Chapters are chartered
- ✓ Launched Chapter Challenge
- ✓ HPPA wins the first Chapter Challenge

2015

- ✓ Official naming of the Leslie and Anita Harper Alumni Center
- ✓ Sacramento State welcomes new president Dr. Robert S. Nelsen
- ✓ HPPA wins Chapter Challenge
- ✓ Initiated Chapter Leader of the Year Award
- ✓ Jackie Morris (Black Alumni Chapter) named Chapter Leader of the Year

2016

- ✓ Asian Pacific Islanders(API) and Placer County Alumni Chapters are chartered
- ✓ HPPA wins Chapter Challenge
- ✓ Krystal Moreno (HPPA) named Chapter Leader of the Year

8/30/2021

- ✓ Launched updated SSAA website
- ✓ Sacramento State holds the first Farm-to-Fork Event including dinner on the Guy West Bridge

2017

- ✓ Deanna Daly (Business) named Chapter Leader of the Year
- ✓ Hosted Nike athletes during U.S. Olympic Track and Field Trials
- ✓ Riverview residence hall completed
- ✓ Sacramento State names new provost, Ching-Hua Wang

2018

- ✓ Holly Tiche (Placer Alumni Chapter) named Chapter Leader of the Year
- ✓ \$6 million gift from Dale '84 and Katy Carlsen to go towards the new Center for Innovation and Entrepreneurship at Sacramento State
- ✓ Parking Structure 5 opens - a six-story, 529,000-square-foot homage to campus trees
- ✓ Sacramento State Downtown (304 S Street) opens

2019

- ✓ Honored seven alumni at our Distinguished Alumni Awards
- ✓ Mission Driven Chapter Model approved and phased implementation begins.
- ✓ Chapters adopt annual strategic planning sessions each summer for year ahead
- ✓ Required chapter officers are redefined as President, Vice President/President-elect, Secretary/Treasurer, and Events Officer
- ✓ SSAA retires Chapter Grant Program and replaces it with an annual funding allocation for each chapter that is greater than past membership dues and chapter grants combined
- ✓ Latino Alumni Chapter renamed Latinx Alumni Chapter
- ✓ Speech Pathology and Audiology Alumni Chapter renamed Communication Sciences and Disorders Alumni Chapter

2020

- ✓ On January 1, 2020, SSAA eliminated our dues membership and allowed all alumni to be members upon graduation once they activate their free membership
- ✓ New SSAA membership model launched, alumni can affiliate with up to three chapters
- ✓ Gave out 39 scholarships totaling \$73,750
- ✓ All alumni and chapter programming transitioned to virtual due to COVID-19
- ✓ Held Distinguished Alumni Awards virtually and honored seven alumni
- ✓ Awarded two CASE District VII Awards of Excellence (one Gold and one Grand Gold) for the virtual 2020 Distinguished Alumni Awards event
- ✓ Individual chapter bylaws are retired and replaced with an annual chapter agreement
- ✓ Men's Basketball and Friends Alumni Chapter activities are incorporated into Hornet Athletics
- ✓ Hired our first ever Student & Recent Grad Engagement Officer
- ✓ Held our first ever virtual Grad Fest
- ✓ Started the Natural Sciences and Mathematics Alumni Network

2021

- ✓ Gave out 48 scholarships totaling \$93,600
- ✓ All alumni programming continued to be virtual due to COVID-19
- ✓ Started the long-awaited Lavender Alumni Network to serve our LGBT+ Alumni
- ✓ Chapters participated in Give Sac State Day to fundraise for chapter scholarships
- ✓ Continued to increase chapter and network presence at campus commencement ceremonies
- ✓ Started the foundation for an El Dorado Alumni Network to start in the 2021-22 year
- ✓ Art Alumni Chapter began their annual presence in the Festival of the Arts
- ✓ Art Alumni Chapter began the transition to a more inclusive Visual and Performing Arts (VAPA) Alumni Chapter

5. QUICK FACTS

- Sacramento State Alumni Association was established July 20, 1950
- The Alumni Association is governed by a 30-member Board of Directors
- Colette Harris-Mathews is the 57th Alumni Association president
- There are more than 255,000 Sac State alumni
- One in 20 local residents are Sacramento State alums
- 3,300 Legacy Life Members
- Thousands of new Member activations for the 2020-21 fiscal year
- 12,000 square foot Harper Alumni Center available for use/rent
- Alumni Grove created and maintained since 1953
- Currently there are 16 Chapters and Networks:
 - Asian Pacific Islander Alumni Network
 - Black Alumni Chapter
 - Business Alumni Chapter
 - Communication Studies Alumni Chapter
 - Construction Management Alumni Network
 - Criminal Justice Alumni Network
 - El Dorado Alumni Network
 - Engineering and Computer Science Alumni Chapter
 - Hornets Policy and Politics Alumni (HPPA) Chapter
 - Latinx Alumni Chapter
 - Lavender Alumni Network
 - Natural Sciences and Mathematics (NSM) Alumni Network
 - Nursing Alumni Network
 - Placer Alumni Network
 - Veterans Alumni Network
 - Visual and Performing Arts (VAPA) Alumni Chapter
- Scholarships ranging from \$500 to \$3,000 are awarded annually in the following categories:
 - Freshman
 - Continuing Undergraduate

- Graduate
- Visual and Performing Arts
- Communications Studies (Margot Shinnamon Bach Scholarship)
- Les and Anita Harper Scholarship
- Henry Giron Memorial Scholarship
- ECS Chapter Scholarship
- Latinx Alumni Chapter Scholarship
- HPPA Chapter Scholarship
- Black Alumni Chapter Scholarship
- Business Alumni Chapter Scholarship
- Jackie Morris-Henderson Scholarship
- Guardian Scholars (David & Margot Bach Scholarship)
- Construction Management Chapter Scholarship
- Penny & Terry Kastanis Teacher Education Scholarship
- Placer Chapter Scholarship
- Kit and Susan Oase Scholarship
- John and Eleanor Zeltin Scholarship
- Golden Hive Scholarship

➤ Alumni Awards:

- Order of the Hornet
- Distinguished Service
- Rising Star
- Lifetime Achievement
- Honorary Alum

➤ Events:

- Homecoming & Tailgate parties
- 50 Year Club (Golden Grads) Reunion Luncheon
- Scholarship Reception
- Grad Fest
- Member Events
- Alumni Month
- Distinguished Alumni Awards dinner
- Mixers/Special Events

➤ Alumni/Donor Publications:

- *Sac State Magazine*
- *Sac State Connection* e-Newsletter

6. ALUMNI RELATIONS EXECUTIVE DIRECTORS

1950-1960	John Samara
1960-1964	Wayne D. Gray
1964-1967	James V. Vaughter
1967-1968	Charles Chatfield
1968 (6 mos.)	G. C. Zader
1968-1969	Harry Shoup
1970-1977	R. Harold Van Cleave
1977-1982	Ray G. Clemons
1982-1985	Unknown
1985-2004	Steve Black
2004-2005	Joe Sheley (Interim)
2005-2006	Dawniela Hightower (Interim)
2006-2008	Gary Davis
2008 (5 mos.)	Dawniela Hightower (Interim)
2008- Present	Jennifer Barber

7. ALUMNI ASSOCIATION PRESIDENTS

1950-1952	David C. Morse
1952-1954	Jack H. Bertolucci
1954-1956	Walter J. Holland
1956-1958	John A. Patterson
1958-1960	John Krier
1960-1961	Larry Voss
1961-1964	Bruce Porter
1964-1966	Hal Hewitt
1966-1967	William H. Collard
1967-1968	Ann Cornelius Reardon
1968-1969	Claire LaBelle Luke
1969-1970	William A. Briggs, Jr.
1970-1971	William E. Thompson III
1971-1973	Stephen J. Rooney, Jr.
1973-1974	Christopher "Kit" Oase
1975-1976	Robin Allen
1977-1978	Bill White, Ph.D.
1978-1979	Gary L. Quattrin
1980-1981	Karen Stroch Galway
1981-1982	Brandon W. Wheeler
1982-1984	David W. Ferris
1984-1986	Frank H. Raymond
1986-1987	Robert C. Benton
1987-1988	Thomas L. Dille

1988-1989	Jeffrey P. Higgins
1989-1990	Debra Noble
1990-1991	Marcus J. Lo Duca
1991-1992	Patricia Covarrubias-Baillet
1992-1993	Kenneth R. Lake
1993-1994	Thomas L. Dille
1994-1995	Barbara Sewald Raines
1995-1996	Ronald W. Smith
1996-1997	Melissa Cadet-Brown
1997-1998	Kenneth D. Stieger
1998-1999	Karen M. Bakula
1999-2000	Scott W. Maxwell
2000-2001	Mike Anderson
2001-2002	Larry Augusta
2002-2003	Elizabeth McClatchy
2003-2004	Jim Thyken
2004-2005	Larry Cook
2005-2006	Jeanie Esajian
2006-2007	Tina Treis
2007-2008	Sam Starks
2008-2009	John Barney
2009-2010	Bob Moreno
2010-2011	Chris Higdon
2011-2012	Rebecca Gardner Moy
2012-2013	Margot Shinnamon Bach
2013-2014	John Abbott
2014-2015	Marco Rodriguez
2015-2016	Eric Guerra
2016-2017	Bruce Hohenhaus
2017-2018	Matt Cologna
2018-2019	Rhonda Staley-Brooks
2019-2020	Amanda Merz
2020-2021	Ron Brown
2021-2022	Colette Harris Mathews

The Order of the Hornet Award was presented from 1972-1985. In 1987 the awards became known as the Distinguished Service Awards, periodically giving Order of the Hornet () designation to selected recipients. Later added were Honorary Alumnus/a (**), Lifetime Achievement (***) and Rising Star (****) categories. Faculty/Administrator awards are designated (^).*

1972

Gordon D. Schaber
Robert Wyman

1973

Hubert McCormick^

1976

Donald Bailey^
John W. Baker^

1977

Robert Gustafson
Harold B. Roberts^

1978

Lewis Crowl^
Joe A. McGowan^
Stanley Pretzer^
Efra Zollinger^

1979

Keith B. Kenny
J. Harold Severaid^

1980

Henry A. Bamman^
Phillip Isenberg
Gordon P. Martin^
George Sumner

1981

George Creel^
Rod Hamilton
Ann Reardon

1982

Steven Arvizu
Sandra Baker

1983

W. Lloyd Johns^

1984

Carl Ludwig^
Thomas Willoughby

1985

Lloyd Connelly
John P. Kearns

1987

Frank Borgia
Nick Floratos
Dorothy Lombard*
Coach Bob Mattos*
John McNamara

1988

William Campbell III*
Robert Curry*^
Margo Murray
Jean Runyon
William Whitehead^

1989

W. Richard Cobb^
Marjorie Geiszler
C. Stanley Gilliam
Winnie Leung*
Robert Mange
Robert Rivinius

1990

Deborah Colberg^
C. Carson Conrad
Fred Dawkins
David Morse*
Norman J. Phillips**
John Ranlett*^
M. Wayne Thiebaud
Malcolm Weintraub

1991

Fred Uhl Ball
Robert W. Bell*
Grantland Johnson
Said Kaki
Trong Nguyen
Joe A. Serna, Jr.^

Gary Quattrin*
Leticia Quezada

1992

Felicia Bessent
Ward Connerly
Linda Dixon
William Dorman^
John Fitzgerald
Fred Hummel**
Elizabeth McClatchy
Don Zingale^

1993

Fred Anderson**
Phil Boyer
Jamie Candelaria
Kenneth Hansen
June LaVerne Long
Antonia Lopez
Sam Pannell
Ron W. Smith*
Dennis Tootelian^

1994

Donald Gillott**^
Allen Johnson
Gregory Kondos
Dave Lucchetti
Sylvia Minnick

1994 (con't)

Barbara O'Connor^
James Shelby
John Smith**^
Jack Waymire*

1995

Mary Buehler
Louis Desmond**
Al Geiger
Isabel Hernandez-Serna*^
Frank LaPena*^
Robert Metcalf^
Enlow Ose**
John Poswall
Pauline Roccucci
Raymond Valdez

1996

William Collard
Gloria Glycer
Kenneth Kerri^
Duane Lowe
Denise Mazzucca-Barrett
Josef Moorehead**^
William Popejoy
Jan Scully

1997

Calvin Boyes**^
Janice Rogers Brown
Irvin Faria^

Giselle Fernandez
Roger Fong
Joseph J. Kearns
Steve Pleau
Roger Valine
Richard Weaver
Tom Weborg
Steven Yamshon*

1998

Edward Chavez
Christine Dean
Daniel Decious^
Daniel DeFoe
Clarke J. Dominguez
Thomas Hobday**
Kelvin K. Lee
Mike McGowan
John Messner*
Ted Morse
John Moulds
Paul Sax
Bev Short*

1999

Philip Cowan*
Lory Heron
Albert Hurtado
Melinda Melendez*
Joseph Mohamed, Sr.
Randy Paragary
Paul Robins*

Alex Spanos**
Harry Sweet**
Gail Tom^
Charles Trainor

2000

Suzanne Adan

2000 (con't)

Stan Atkinson**
Louis Blanas
Jesus Fernandez, Jr.
Mary Hargrave
Catherine MacMillian*
Janet McWilliams
Kenneth Owens^
Tony Saca
Dixie Schneider*
Joe A. Serna, Jr.***^
Michael Stevens
Robert Thomas

2001

Patricia Cochran
Ron Davis
Dennis Gardemeyer*
Muriel Johnson**
Gary Kimmel*
Gregg Lukenbill
Kathleen McGrath
Kitty O'Neal
Ray Shaddick
Angelo Tsakopoulos***

Michael Ubaldi
Robert Waste^

2002

Roy Brophy**
Christopher Cabaldon
Dale Carlsen
Richard C. Johns
Suzanne Kingsbury
William H. Lee
Mary Louise Mack
Gil Moore
Robert Perry-Smith
Felicenne Ramey^
H. John Shaw, III
Fred Teichert

2003

Virginia Avila
Rosemary Clemons**
Robert Dean
Edward Del Biaggio^
Mike Dourgarian
Jim Fitzpatrick
Gary Hart**^
Gail Hullibarger
Judy Quattrin^
Ben Roberts
Marlene Von Friederichs-Fitzwater^
H. Nicholas Windeshausen**^

2004

Ray Clemons**^
 Fred Dalkey
 Kayla Gillan
 Craig T. Johnson
 Kenneth A. Macias
 Robin Martial
 David H. Mering
 Scott J. Modell^
 Melba O. Mosher
 Pamela G. Saltenberger
 Robbie Waters
 Mary Jane Young

2005

Michael L. Brown
 Sonney Chong
 Todd Murch
 Albert Najera
 Kirk B. Sturm
 Scott C. Syphax
 Ann Weldy^
 Rosemary Younts

2006

Jack Bertolucci
 William Campbell III***
 Patrick Fenwick
 Jack Higdon
 Marilyn Hopkins^
 Theresa Parker
 Randy Reynoso
 Rene Syler

2007

Larry Augusta
 Daniel Cole**
 Lauren Hammond
 Kim Hughes^
 Scott W. Maxwell
 Gloria Nomura
 Alice D. Perez
 Lloyd O. Snelson
 Roger Valine***
 Larry Williams
 Karen Zamarripa
 Daniel Zingale

2008

Michael Carter
 Mark Drobny**
 John Gesek
 Greg Knapp
 Sia Nemat-Nasser
 Walt Schaub
 Pamela O. Stewart**
 Paulette Trainor

2009

Karen Bakula
 Charles E. Bell
 Larry R. Cook***
 George Crandell**
 Alejandro Garcia
 Jan A. Nolta

2010

Baldwin Chiu****
 Douglas Curley
 Helena Fitch-Snyder
 Eddie Kho
 Cristina Mendonsa
 Michael Reinero
 Holly Tiche

2011

Krista Bernasconi****
 Patricia Clark-Ellis**
 Thomas M. Gilbert
 Paul Lau
 Ted Puntillo
 Tina Treis

2012

Greg J. Hagwood
 John & Margi Herzog
 Robert Raul Meza****
 Kit Miyamoto
 Mark Otero
 Joseph F. Sheley***
 Janay Swain****

2013

David Bugatto
 Cheryl Dell
 Michael Kuhlmann
 Garry Maisel
 Rhonda Staley-Brooks
 Christina Preston****

2014

Maureen Bauman
 Chris Higdon
 James P. Mayer
 Javed Siddiqui
 Keri Thomas

2015

Tami R. Bogert
 Cate Dyer
 Pat Fong Kushida
 Jim Gomez
 Alexander Gonzalez *^
 Philip I. Person****
 Lee Ritchey
 Jan Scully***
 Scott Yuill

2016

Christine & Michael Ault
 Justin Knighten****
 Susan McGinty**
 Tim Murphy
 Ann & Craig Perez
 Deborah Ross-Swain

2017

Kimo Ah Yun
 Kraig Clark
 Carol Garcia
 Gilbert Herdt
 Andrei Tokmakoff

Angelo A. Williams
Ryan M. Harrison ****

2018

Margot Shinnamon Bach
Ana Klein
Bill Mueller
Dr. Joseph Tuscano
Tracy Young****

2019

Saori Choulos
Jeff Dern
Dr. Maridith A. Curfman-Janssen
Patrick C. McClain
Jackie Morris-Henderson
Gary and Judy Quattrin***
Dr. Meagan O'Malley****

2020

Preet Didbal
Dr. Jamillah Moore
Dr. Jenni Murphy
R. Scott Owens
David Bach**
Alyssa Nakken****
Rhys Hoskins****



BY-LAWS

OF THE

ALUMNI ASSOCIATION

OF

CALIFORNIA STATE UNIVERSITY,

SACRAMENTO

Approved May 10, 2021

Previously amended and approved:

November 2007

June 2009

December 2012

October 2013

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June 2019

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**BY-LAWS OF THE
ALUMNI ASSOCIATION
CALIFORNIA STATE UNIVERSITY, SACRAMENTO**

ARTICLE I. NAME & LOGO USAGE

Section 1. Name

The name of this organization shall be the ALUMNI ASSOCIATION, CALIFORNIA STATE UNIVERSITY, SACRAMENTO d.b.a. Sacramento State Alumni Association; it is the successor for all purposes to the Association formerly known as "SACRAMENTO STATE COLLEGE ALUMNI ASSOCIATION".

Section 2. Logo

The Association is authorized to adopt an official Logo of the Sacramento State Alumni Association. Such logo shall be property of the Association. Reproduction of the Logo for any purpose must have express approval by the Executive Committee.

ARTICLE II. MISSION AND PURPOSE

Section 1. Mission

The mission of the SACRAMENTO STATE ALUMNI ASSOCIATION of California State University, Sacramento is to connect, engage and celebrate alumni, students and friends of Sacramento State while building lifelong relationships that support the future of our University.

Section 2. Powers and Non-Profit Status

The Association is authorized to do any and all things necessary, reasonable, or proper to accomplish the foregoing section. The Association is nonpolitical, nonsectarian, and nonprofit; therefore, there shall be no distribution of gains, profits, or dividends to its members.

Section 3. Non-Discrimination Clause

Membership or benefits of membership in the Association shall not be restricted on the basis of race, religion, national origin, gender, physical disability or sexual orientation.

ARTICLE III. PRINCIPAL OFFICE

Section 1.

The principal office for the transacting of business is hereby fixed and located at Sacramento, California, in the office of the Alumni Association, California State University, Sacramento.

ARTICLE IV. MEMBERSHIP

Section 1. Eligibility for Membership

- a. The following persons shall be eligible for regular active membership in this organization upon payment of the appropriate contributions as provided in Article V, of these By-Laws:
 - i. Any person who has completed twelve (12) units at California State University, Sacramento.
 - ii. Any married couple or domestic partnership in which one party is an alumnus shall be eligible for a household membership.
 - iii. Any person who became an active member before January 1951, is a charter member.
 - iv. The Board of Directors shall establish classifications of membership with the appropriate contribution necessary to qualify for membership recognition within each class.
 - v. Any person, business, or corporation interested in advancing the interests of the University may be considered for such special membership status other than regular active under such terms and conditions as the Board of Directors may establish.
- b. Any person who completed an undergraduate or graduate degree from California State University, Sacramento, shall be eligible to activate a general membership with no contribution. Upon payment of a contribution, they will also qualify for membership recognition at a level commiserate with the amount of the contribution.

Section 2. Honorary Life Members

Any person elected by the unanimous vote of all members of the Board of Directors of the Association may be an Honorary Life Member. These members shall be considered as active members for all purposes.

Section 3. Privileges of Membership

The privileges of voting and holding office and being a member of the Board of Directors in this Association shall be vested exclusively in those that have contributed to be active lifetime members of the Association. No one shall be eligible to serve as an Officer or a member of the Board of Directors while registered as an undergraduate student, save and except the President of the Associated Students, Inc., of California State University, Sacramento, as provided in Article VI, Section 2.

Section 4. Faculty and Staff Members

Any person who is or has been a member of the faculty or staff at California State University, Sacramento, and not otherwise qualifying for regular-active membership under Article IV, Section 1, shall be eligible as an associate member in any contributing member levels.

Section 5. Student Members.

Students of California State University, Sacramento, may join the Association as student members. Such student members become members of the Student Alumni Association (SAA) formerly known as the Student Alumni Council (SAC), a chapter of the Association.

ARTICLE V. CONTRIBUTIONS

Section 1. Annual Contributions

The annual contributions for membership in this Association shall be established by the Board of Directors and published on the Association's website and in other relevant materials.

Section 2. Fiscal Year

The fiscal year shall be determined by the Board of Directors.

Section 3. Payment of Contributions

The membership contributions are payable to the Alumni Association at the Alumni office at principal office of the Association.

ARTICLE VI. ORGANIZATION

Section 1. Officers

The Officers of the Association will be:

- a. President
- b. President-Elect
- c. Vice President of Membership Engagement
- d. Vice President of Fund Development
- e. Vice President of Finance
- f. Vice President of Administration
- g. Vice President of Chapter Engagement
- h. Vice President of Scholarship
- i. Nominating Chair
- j. GOLD Alumni Council Representative

Section 2. Board of Directors

- a. Powers. Subject to the limitations of these Bylaws, the Articles of Incorporation, and the laws of the State of California, the affairs of the Association shall be managed by, and all corporate powers of this Association shall be vested in and exercised by, a Board of Directors by a majority vote of a quorum thereof.
- b. Composition of the Board. The Board of Directors shall be comprised of a maximum of thirty (30) voting members. All members of the Board shall serve without compensation.
 - i. One Director shall be the President of California State University, Sacramento, or the President's designee;
 - ii. One Director shall be the Vice President for University Advancement or the Vice President's designee;
 - iii. One Director shall be the President of the Associated Students, Inc., of California State University, Sacramento;
 - iv. One Director shall be selected from nominations of faculty members provided by the California State University, Sacramento Academic Senate, and seated for a one-year term;
 - v. One Director shall be selected from nominations provided by the Retirees Association and seated for a one-year term;

- vi. One Director shall be selected from nominations provided by the University Staff Assembly and seated for a one-year term;
- vii. One Director shall be the Assistant Vice President of the Alumni Association;
- viii. One Director shall be the University Foundation Board Chair or the Chair's designee;
- ix. One Director shall be the Chair of the GOLD (Graduates of the Last Decade) Alumni Council;
- ix. A maximum of twenty-one (21) Directors shall be elected from the membership-at-large in the manner set out in Article X of these By-Laws.

Section 3. CSU Alumni Council Representative

The Association shall be represented on the California State University Alumni Council by the Assistant Vice President and the elected CSUAC Representative. The CSUAC Representative will be appointed by the President and confirmed by the Board along with the annual slate of officers. The CSUAC Representative may be a sitting Board Director or an Emeritus Board Director. The CSUAC Representative shall perform other duties as prescribed by the Board of Directors or the By-Laws.

Section 4. Executive Committee

- a. Members. The Executive Committee shall be composed of the Officers of the Association.
- b. Powers. The Executive Committee may exercise such powers, and conduct such business affairs of the Association, as the Board of Directors delegates to the Committee. Between regular meetings of the Board of Directors, the Executive Committee may act on behalf of the Board. Actions requiring approval of the Board shall be submitted to the Board at the next board meeting.

Section 5. Term of Office of Directors

Directors elected from the membership-at-large shall serve a term of three (3) years that shall begin on July 1 of the year of election and continue through June 30 of the third succeeding year. Directors may not serve more than two (2) consecutive three (3) year terms or a total of six consecutive years. Directors may apply to serve additional terms after at least a one (1) year absence. This rule would not apply if it would create a vacancy in the position of Immediate Past President; President; or President Elect. This will not apply to those who are appointed to fill out an unexpired term; they will serve only to the end of the term to which they are appointed.

Section 6. Staggering of Election Terms

The terms of Directors elected from the membership-at-large shall be staggered so that seven (7) Directors are elected in one year, seven (7) Directors in the second year, and seven (7) Directors are elected in the third succeeding year.

Section 7. Term of Office of Officers

The Officers shall serve for one year commencing on July 1 of the year in which they are elected to serve and continue through June 30 of the following year. Officers who are appointed or elected to fill a vacancy in an unexpired term shall serve until the end of the unexpired term.

Section 8. Continuation in Office by Directors and Officers

Directors and Officers shall continue in office through the end of their term or until their

successors are elected or appointed in accordance with these By-Laws. This section shall not apply where a Director or Officer leaves office, resigns, or is removed in accordance with other provisions of these By-Laws, or is otherwise unable to continue in office.

ARTICLE VII. AMENDMENTS

Section 1. Vote Required

The By-Laws may be amended by the vote of two-thirds of the filled positions of voting members of the Board of Directors, as determined in Article VIII, Section 1, at any regular, annual, or special meeting.

Section 2. Notice of Proposed Amendments

Written notice of any proposed amendments of the By-Laws must be mailed to every member of the Board of Directors at least ten days prior to any meeting at which proposed amendments are to be introduced for the consideration of the Board of Directors or members of the Association.

ARTICLE VIII. QUORUM

Section 1. Determination of Quorum

At the start of any regular or special meeting the Vice President of Administration serving as secretary for the Association shall determine the number of filled positions on the Board, not to exceed the number specified in Article VI, Section 2.

Section 2. Size of Quorum

A quorum shall consist of a simple majority of the filled positions on the Board.

ARTICLE IX. DUTIES OF OFFICERS AND BOARD OF DIRECTORS

Section 1. Assistant Vice President

The Assistant Vice President of the Alumni Relations shall serve as the Assistant Vice President of the Alumni Association. The Assistant Vice President shall act as liaison between the university administration and the Association, working with the board of directors and the alumni office staff. The Assistant Vice President shall be custodian of all books and records of the Association and shall cause minutes of the proceedings of all meetings to be taken and maintained. The Assistant Vice President shall be an ex-officio member of the board and of all committees, shall supervise all employees of the Association and shall be responsible for all communications of the Association.

Section 2. President

The President shall be the chief executive officer of the Association and shall, subject to the control of the Board of Directors, have general supervision, direction, and control of the business and affairs of the Association. The President shall preside over all meetings of the Board of Directors. The President shall appoint all committee chairpersons except as otherwise provided herein. Such appointments shall be submitted to the Board of Directors for approval. The President shall be a voting

member of the Executive Committee. The President shall be a non-voting ex-officio member of all other committees. The President shall have the general powers and duties of management usually vested in the office of president of any association and shall have such powers and duties as may be prescribed by the Board of Directors or by the By-Laws.

Section 3. President-Elect

The President-Elect shall perform all duties of the President in the President's absence, and when so acting shall have all the powers of, and be subject to all restrictions upon, the President. In the event the office of the President shall become vacant during the term of office, the President-Elect shall succeed to the office. The President-Elect shall also serve as the Nominating Chair and the liaison officer between the Association and its affiliate/alumni chapters to help maintain communication and activity. The President-Elect shall perform other duties as prescribed by the Board of Directors, or the By-Laws.

Section 4. Vice President of Chapter Engagement

The Vice President of Chapter Engagement shall be responsible for oversight of all chapters of the Association which are organized for the purpose of achieving the organization's mission by reaching out to its chief constituency, alumni, students, the community and the University. The Vice President of Chapter Engagement shall keep the Executive Committee apprised of these endeavors and shall work to ensure their success. The Vice President of Chapter Engagement shall perform other duties as prescribed by the Board of Directors, or the By-Laws.

Section 5. Vice President of Finance

The Vice President of Finance is the chief financial officer of the Association and shall be responsible for the financial affairs of the Association and oversight of the Finance Committee. At each business meeting of the Board of Directors, the Vice President of Finance shall report the financial condition of the Association. The Vice President of Finance shall review the annual budget for the Association, which is prepared by staff, and submit it to the Board of Directors for approval. The Vice President of Finance shall perform other duties as prescribed by the Board of Directors, or the By-Laws.

Section 6. Vice President of Administration

The Vice President of Administration shall establish quorum at each meeting of the Board, maintain a record of adopted policies and actions of the Association, and lead the By-Laws revision process as needed. The Immediate Past President shall serve as Vice President of Administration and be confirmed by the Board of Directors as part of the annual slate of officers. The Vice President of Administration shall ensure that written records and documents of the Association are maintained. The Vice President of Administration shall perform other duties as prescribed by the Board of Directors, or the By-Laws.

Section 7. Vice President of Membership Engagement

The Vice President of Membership Engagement shall be responsible for chairing the Membership Engagement Committee, which has oversight and responsibility for growing and maintaining the membership base of the Association. This includes all duties related to working with professional staff to bring forth strategies for recruitment, retention, member satisfaction and benefits; and working closely with other members of the Executive Committee, other Board members, campus entities, etc. to implement membership marketing and engagement efforts. The Vice President of Membership Engagement shall perform other duties as prescribed by the Board of Directors or the By-Laws.

Section 8. Vice President of Fund Development

The Vice President of Fund Development shall be responsible for chairing the Fund Development Committee, which has oversight and responsibility for growing and maintaining funding from non-membership sources for the Association. This includes all duties related to working closely with other members of the Executive Committee, other fund development entities of the University, and the Board at large to provide an ongoing program of seeking and cultivating existing and new non-membership sources of support for the Association. These sources of support include, but are not limited to, affinity programs, sponsorships, and the Alumni Center rental enterprise, potential donors for naming opportunities and new funding opportunities. The Vice President of Fund Development shall perform other duties as prescribed by the Board of Directors or the By-Laws.

Section 9. Vice President of Scholarship

The Vice President of Scholarship shall be responsible for chairing the Scholarship Committee, which oversees the Annual Alumni Scholarship program. This includes soliciting applications and nominations, selecting recipients for the Annual Alumni Scholarships, establishing criteria for selection, planning and executing revenue generating activities for increasing funds available for the scholarship. The Vice President of Scholarship shall perform other duties as prescribed by the Board of Directors or the By-Laws.

Section 10. Nominating Chair

The Nominating Chair shall be responsible for chairing the Nominating Committee, which oversees the selection of candidates to fill vacancies on the Board of Directors or any Officer position. The President-Elect shall serve as chair and be confirmed by the Board of Directors as part of the annual slate of officers. The Nominating Chair serves as an executive officer of the Association and is a member of the Executive Committee. The Nominating Chair shall perform other duties as prescribed by the Board of Directors or the By-Laws.

Section 10. GOLD Alumni Council Liaison

The Board of Directors shall be represented on the GOLD (Graduates of the Last Decade) Alumni Council by this position. The GOLD Alumni Council Liaison will be appointed by the President and confirmed by the Board as part of the annual slate of officers. The GOLD Alumni Council Liaison serves as an executive officer of the Association and as a member of the Executive Committee. The GOLD Alumni Council Liaison shall perform other duties as prescribed by the Board of Directors or the By-Laws.

ARTICLE X. NOMINATION AND ELECTION

Section 1. Nominating Committee

The Nominating Committee shall consist of at least four members, including the Immediate Past President or another past officer of the Association as chairperson, the President-Elect, and two or more members of the Association appointed by the chairperson with the approval of the president.

Section 2. Duties of Nomination Committee

It shall be the duty of the Nominating Committee to select from the regular active membership, candidates to fill the vacancies that are to occur on the Board of Directors or in any Officer position, due to expiration of the terms of office. The Committee is responsible for vetting potential Directors and submitting the slate of nominees to the Board for approval at the March meeting. The Committee is also

responsible for vetting candidates for officer positions and submitting the proposed slate of officers to the Board for approval at the May meeting.

Section 3. Filling Vacancies in Unexpired Terms

It shall further be the duty of the Nominating Committee to select from the regular active membership, candidates to fill vacancies that occur on the Board of Directors or in any Officer position, before the completion of the Director's or Officer's regular terms.

Section 4. Requirements for Office

- a. In order to be nominated for President or President-Elect, a person must have served on the Board of Directors at least one year. In order to be nominated for a Vice-President role, a person must have served on the Board of Directors at least six months.
- b. Ex officio officers shall not be eligible to hold the offices of President-Elect or President.

Section 5. Removal from Office

Any Officer or Board member may be removed by a two-thirds vote of the filled positions on the Board as defined in Article VI, Section 2.

ARTICLE XI. MEETINGS OF MEMBERS

Section 1. Time, Place and Notice

The annual meeting of the membership of the Association shall be held at a time and place selected by the Board of Directors and duly published to the membership at least ten days prior to the meeting.

ARTICLE XII. MEETINGS OF THE BOARD OF DIRECTORS

Section 1. Frequency of Meetings

The Board shall meet at least five (5) times per year to conduct business and hold one retreat per year at locations set by the Board. The Executive Committee shall meet between Board meetings as necessary, to conduct business on behalf of the Board. Any actions taken by the Executive Committee shall be subject to ratification by the full Board.

Section 2. Directors Absent from Meetings

The name of any Board member missing a total of three (3) Board of Directors meetings during the board year shall be referred to the Executive Committee for disposition as to continued board service.

ARTICLE XIII. COMMITTEES

Section 1. Standing Committees

The Standing Committees of the Association are:

- a. The Nominating Committee, as defined in Article X.
- b. The Executive Committee, as defined in Article VI.
- c. The Finance Committee, under the leadership of the Vice President of Finance, is responsible for reviewing the financial affairs of the Association and reporting the financial condition to the Board on at least a quarterly basis. This includes financial statements, budgets, and making recommendations to the Board on fiscal policy.

Section 2. Committees

Committees of the Association, with the exception of the Executive Committee and the Nominating Committee, may be added or deleted by action of the Board of Directors at any regular meeting of the Board. All Committees, except the Executive Committee and the Nominating Committee must be approved annually for continuation or inclusion no later than the first regular meeting of the Board of Directors of the fiscal year. The list of committees and committee members shall be presented to the Board for approval at the first regular meeting of the Board of the fiscal year.

ARTICLE XIV. THE ESTABLISHMENT AND OPERATION OF ALUMNI CHAPTERS

Section 1. Petitions by Alumni Groups

Alumni groups, whether proposing to become a chapter or an affiliate, may establish themselves as a network and then petition the Board of Directors to become a recognized as an Association chapter. Chapters may be (1) regional, (2) cultural, (3) industry based, (4) associated with an academic discipline, or (5) have some other special interest. Affiliates defined in Article XV of these By-Laws.

Section 2. Compliance with By-Laws

Alumni chapters and networks must comply with the Association's By-Laws, policies and procedures.

Section 3. Requirements for Petitions

An alumni network or group can become a chapter of the Association by fulfilling all of the requirements set forth by the Board of Directors of the Association. Said requirements include but are not limited to the following:

- a. An interested group must submit a petition, a completed a chapter agreement, and a drafted strategy plan to the Assistant Vice President of the Association.
 - i. The petition shall include a statement that the petitioning group agrees to:
 - a. Abide by the By-Laws of the Association;
 - b. Comply with the rules, regulations, policies and procedures that are set forth by the Board of Directors;

- c. Comply with campus policies and procedures;
 - d. Comply with the requirements of Article 15 and regulations of the CSU Trustees.
- b. When the Assistant Vice President finds that the petitioning group has successfully completed the requirements of the Board as set forth in this section, the Assistant Vice President shall submit the petition to the Board of Directors with a recommendation for approval or denial of the petition. If the Board of Directors approves the petition, the group shall be awarded a charter as a chapter of the Association.

Section 4. Responsibilities of the Chapter and the Association

Once chartered, an Alumni Chapter shall be an integral part of the Sacramento State Alumni Association and comply with:

- a. All the requirements of Article 15, established accounting/financial processes and the regulations of the CSU Trustees, as well as policies that may be adopted by the Association or University;
- b. By-Laws, policies and procedures established by the Association;
- c. Development of fundraising programs only with Association approval and in accordance with section 42397.3 of Article 15 and the Memorandum of Agreement between the Association and the University;
- d. Annually completed chapter agreement and strategy plan.

Section 5. Revocation of Chapter Charter for Cause

- a. Alumni chapters may have their charters revoked at any time for a violation of the by-laws and/or policies of the Association or any actions the Board of Directors of the Association deems not to be in the best interests of California State University, Sacramento.
- b. The Association will provide sixty (60) day written notice to the chapter of such revocation.
- c. The chapter may be granted a hearing by the Board on the subject of such revocation, if requested, within said 60-day period by the executive officer of such chapter. The hearing will be held within 30 days of the request.
- d. Upon revocation of the charter, any funds in the chapter's account will be distributed as follows: First, to the payment of all outstanding debts and liabilities of the chapter; second, to the Association for chapter development purposes.

Section 6. Administrative Suspension or Dissolution of Chapters

- a. A chapter shall be subject to suspension if there are six (6) consecutive months in which (1) there are no Officers; (2) no chapter business meetings or activities are held; or (3) membership falls below thirty (30) members.
- b. Chapter Officers, and chapter liaison staff if applicable, shall receive notice of an impending suspension from the Association and shall have forty-five (45) days in which to respond. Responses complete with a reactivation plan will be considered by the Board.
- c. If the chapter does not respond to the suspension notice within 45 days, the chapter's charter shall be formally suspended. Upon suspension, all current chapter members shall be notified and all

chapter funds shall be distributed as follows: First, to the payment of all outstanding debts and liabilities of the chapter; second, all remaining funds shall revert to the Association for Chapter Development purposes.

- d. International chapters require special handling and will be addressed on a case by case basis by the Board.

ARTICLE XV. ESTABLISHMENT AND OPERATION OF AFFILIATES

Section 1. Definition of Affiliates

Groups who are associated in some manner with Sacramento State, but whose membership consists primarily of persons who did not attend Sacramento State as undergraduates and did not earn an undergraduate degree at Sacramento State may become Affiliates of the Association. Such groups may include regional groups, fraternal associations, professional or occupational associations, or similar organizations. The Association encourages and gives advice and assistance to such groups who wish to become affiliated with the Association.

Section 2. Operations of an Affiliate

Such groups will establish a Memorandum of Understanding (MOU) with the Association and will fulfill the requirements set forth in the MOU as agreed upon by the Board of Directors of the Association. Once established, the Affiliate shall be part of the Association and comply with the by-laws of the Association, campus policies and procedures, and the requirements of Article 15, Alumni Associations, of the regulations of the Trustees of the CSU system. Affiliates may have their status revoked for violation of the MOU and in the absence of a reasonable attempt to correct the violation. The Affiliate Group will be given 60 days to address the violation before action to revoke their status is taken.

ARTICLE XVI. INDEMNIFICATION OF DIRECTORS, OFFICERS, AND OTHER AGENTS

Section 1. Rights of Indemnity

To the fullest extent permitted by law, the corporation shall indemnify its directors, officers, employees, and other persons described in Section 5238 (a) of the California Corporations Code, including persons formerly occupying any such position, against all expenses, judgments, fines, settlements and other amounts actually and reasonably incurred by them in connection with any "proceeding," as that term is used in that Section, and including an action by or in the right of the corporation, by reason of the fact that the person is or was a person described in that Section. "Expenses," as used in this bylaw, shall have the same meaning as in Section 5238 (a) of the California Corporations Code.

Section 2. Approval of Indemnity

On written request to the Board by any person seeking indemnification under Section 5238 (b) or Section 5238 (c) of the California Corporation Code, the Board shall promptly determine under Section 5238 (e) of the California Corporations Code whether the applicable standard of conduct set forth in Section 5238 (b) or Section 5238 (c) has been met and, if so, the Board shall authorize indemnification.

Section 3. Advancement of Expenses

To the fullest extent permitted by law and except as otherwise determined by the Board in a specific

instance, expenses incurred by a person seeking indemnification under these bylaws in defending any proceeding covered by those sections shall be advanced by the corporation before final disposition of the proceeding, on receipt by the corporation of an undertaking by or on behalf of that person that the advance will be repaid unless it is ultimately determined that the person is entitled to be indemnified by the corporation for those expenses.

Section 4. Insurance

The corporation shall have the right to purchase and maintain insurance to the full extent permitted by law on behalf of its officers, directors, employees, and other agents, against any liability asserted against or incurred by any officer, director, employee, or agent in such capacity or arising out of the officer's, director's, employee's or agent's status as such



U.S. TREASURY DEPARTMENT

SACRAMENTO STATE COLLEGE

INTERNAL REVENUE SERVICE

RE MAR 1 1965 CD

WASHINGTON, D.C. 20224

PUBLICATIONS OFFICE

IN REPLY REFER TO
T:R:EO:2
MMS

Sacramento State College Alumni
Association
6000 Jay Street
Sacramento 19, California

Gentlemen:

FEB 23 1965

94-6112267
Employer Identification #

Consideration has been given to your application for exemption from Federal income tax as an organization described in section 501(c)(3) of the Internal Revenue Code of 1954.

In a ruling dated October 22, 1963, we held that you were not entitled to exemption from Federal income tax as an organization described in section 501(c)(3) of the Code. The basis for the denial was that you were not organized and operated exclusively for one or more of the exempt purposes specified in section 501(c)(3). You were afforded the opportunity to protest our ruling. After the expiration of the thirty day period, the case was closed in this office since you did not reply and copies of the October 22, 1963 ruling were released to the District Director. Subsequently, you submitted a protest to our ruling and a brief and amendments to your Articles of Incorporation were received.

We have concluded, after an examination of the clarifying amendments to your Articles of Incorporation and of the information and other evidence included in the brief that you are organized exclusively for educational purposes within the purview of section 501(c)(3) of the Code. Accordingly, it is held that you are exempt from Federal income tax under the provisions of section 501(a) as an organization described in section 501(c)(3) of the Code. Our ruling of October 22, 1963, is hereby revoked.

You are not required to file Federal income tax returns so long as you retain an exempt status, unless you are subject to the tax on unrelated business income imposed by section 511 of the Code and are required to file Form 990-T for the purpose of reporting unrelated business taxable income. Any changes in your organization's character, purposes or method of operation should be reported immediately to your District Director for consideration of their effect upon your exempt status. You should also report any changes in your name or address.

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Sacramento State College Alumni
Association

You are required, however, to file an information return, Form 990-A, annually, with the District Director of Internal Revenue, San Francisco, California, so long as this exemption remains in effect. This form may be obtained from the District Director and is required to be filed on or before the fifteenth day of the fifth month following the close of your annual accounting period, which ends December 31.

Contributions made to you are deductible by donors as provided in section 170 of the Code. Bequests, legacies, devises, transfers or gifts to or for your use are deductible for Federal estate and gift tax purposes under the provisions of section 2055, 2106 and 2522 of the Code.

You are not liable for the taxes imposed under the Federal Insurance Contributions Act (social security taxes) unless you file a waiver of exemption certificate as provided in such act. You are not liable for the tax imposed under the Federal Unemployment Tax Act. Inquiries about the waiver of exemption certificate for social security taxes should be addressed to your District Director, as should any questions concerning excise, employment or other Federal taxes.

If distributions are made to individuals, case histories regarding the recipients should be kept showing names, addresses, purposes of awards, manner of selection, relationship if any to members, officers, trustees or donors of funds to you, in order that any and all distributions made to individuals can be substantiated upon request by the Internal Revenue Service. (Revenue Ruling 56-304, Cumulative Bulletin 1956-2, page 306.)

Every exempt organization is required to have an Employer Identification Number, regardless of whether it has any employees. If your organization does not have such a number, your District Director will take steps to see that one is issued to you at an early date.

The District Director, San Francisco, is being advised of this action.

Very truly yours,


Chief, Exempt Organizations Branch

**Article 15 of Subchapter 5 of Chapter 1 of Division 5 of Title 5 of the
California Code of Regulations**

Article 15. Alumni Associations

Section 42397. Purpose.

Campus alumni organizations aid the California State University in achieving its goals by providing leadership in fostering participation and support of campus priorities and representing alumni interests. As a public trust and the beneficiary of the support provided by alumni associations, the trustees are obligated to require that the funds raised by alumni associations be properly controlled and expended. Consequently, it is the intent of the trustees (1) to develop policies and procedures governing the recognition and management of alumni organizations, including the use of funds and institutional resources and, (2) to ensure cooperative and collaborative efforts between the alumni organizations and the campuses. To accomplish this, the campus president has the responsibility of granting and periodically reviewing recognition of a campus alumni association. These provisions govern the relationship between the alumni association and the campus it supports.

Note: Authority cited: Sections 89030 and 89031.1, Education Code. Reference: Sections 89030 and 89902, Education Code.

Section 42397.1. Recognition.

- (a) A campus president, by agreement between the campus and the organization, may recognize as the campus alumni association a single campuswide organization that has the following characteristics:
 - (1) is organized and operated solely for the benefit of the university and its alumni;
 - (2) has as its purpose providing service and support to its members, the alumni of the campus, and to the university;
 - (3) does not restrict membership or benefits of membership on the basis of race, religion, national origin, gender, physical disability or sexual orientation;
 - (4) recognizes the unique role of the campus president in setting campus priorities;
 - (5) is the umbrella organization for the constituency alumni groups of the campus; and
 - (6) irrevocably dedicates its assets for the benefit of a campus of the California State University. In the event of the association's dissolution, its assets shall be transferred to the campus or an auxiliary organization designated by the campus president for purposes consistent with the purposes of the association and the terms of the individual gifts that are part of the assets, and, if a corporation, in conformance with the California Nonprofit Corporation Law.
- (b) Each recognized alumni association shall enter into an agreement with the campus that shall include the following:
 - (1) the provisions of this article shall be incorporated by reference;
 - (2) the exchange of value between the campus and the alumni association shall be expressed and may include provision of facilities and other tangible as well as intangible exchanges;

- (3) a license agreement for use of the campus name and symbols;
- (4) authority and responsibility with regard to use of the campus alumni database; and
- (5) the term of the agreement.

In addition, the agreement may include other provisions unique to each campus and alumni association such as the following:

- (6) financial management and record keeping arrangements between the parties;
 - (7) provisions for the construction and operation of an on-campus alumni center;
 - (8) provisions for use of alumni association name and symbols; and
 - (9) such other provisions that may pertain to the relationship between the campus and the alumni association.
- (c) Compliance with this article and the agreement between the campus and the alumni association is a condition of continued recognition. A copy of this article and the agreement shall be given to all members of the campus alumni association's governing body and to any new member of the governing body when the new member takes office.
- (d) To obtain and maintain recognition, the campus alumni association shall submit the following to the campus president or designee on an annual basis or otherwise as specified by the campus president:
- (1) a current list of officers, members of the governing body, and the principal contact person for the organization;
 - (2) a statement of the organization's purpose and goals consistent with subsection (a) and copies of the current enabling documents of the organization (*i.e.*, bylaws, constitution, articles of incorporation, or other governing document);
 - (3) a current roster of names and addresses of donors and members, unless such records are otherwise maintained by the campus;
 - (4) a statement signed by the officers/representatives of the organization that the governing body has read and formally voted that it will comply with this article and the agreement;
 - (5) a copy of the organization's annual financial statements;
 - (6) for an organization with accounts at a financial institution, a list identifying all such accounts, including the institution's name and address, the organization's account numbers, and a statement signed by an appropriate officer or representative of the organization authorizing the campus to obtain upon request from the financial institution information, records, or photocopies of transactions relating to the accounts; and
 - (7) for an incorporated, tax-exempt organization, (A) a copy of the organization's state and federal tax-exempt status determination letter; (B) a copy of the organization's most recent Internal Revenue Service Form 990; and (C) a list of the types of activities, including fundraising and membership drives, the organization intends to undertake and how the organization intends to financially support these activities.

- (e) The following are among the privileges that may be granted by the campus president to a recognized campus alumni association:
 - (1) use of the name of the campus and symbols, including the name of its mascot or other identifying marks that would cause the public to assume it is dealing with the university or a university recognized group;
 - (2) use of the campus as approved by the campus president or designee in performance of an association's recognized activities; and
 - (3) use of a campus auxiliary organization's investment services, as approved by the campus president or designee.
- (f) Under the authority of the campus president, the recognized campus alumni association may be assigned the responsibility of ensuring that all geographical and special interest chapters of the campus alumni association, as well as other recognized constituency alumni groups, are in compliance with this article.
- (g) After July 1, 2003, use of the campus name and symbols, including mascot or other identifying mark, by an organization that has operated as a campus alumni association, is prohibited unless the organization has been recognized by the campus as the campus alumni association under the provisions of this article. A campus alumni association that meets the criteria of this article and has been recognized as the campus alumni association shall not have that recognition withdrawn by the campus president except for material noncompliance with this article, after having been given an opportunity to correct the noncompliance.

Note: Authority cited: Sections 89030 and 89031.1, Education Code. Reference: Sections 89030 and 89902, Education Code.

Section 42397.2. Organization.

- (a) A campus alumni association may be included as part of the university or an auxiliary organization or, if organizationally separate from the university or an auxiliary organization, shall obtain and maintain status as a tax-exempt organization under state and federal law.
- (b) The campus president or designee shall be an *ex officio* voting or non voting member of the association's governing body.
- (c) Campus presidents are responsible for determining that campus alumni associations are in compliance with this article and have authority to require campus alumni associations to provide written evidence of compliance.
- (d) Campus presidents may, after consultation with the campus alumni association, establish additional written campus policies governing campus alumni associations consistent with this article. Copies of these policies and any amendments thereto shall be forwarded promptly upon their issuance to the Chancellor.
- (e) A campus alumni association shall comply with campus policies pertaining to use of the campus name and symbols.

Note: Authority cited: Sections 89030 and 89031.1, Education Code. Reference: Sections 89030 and 89902, Education Code.

Section 42397.3. Fundraising.

- (a) Fundraising campaigns proposed by a campus alumni association shall be approved in advance in writing by the campus president or designee as provided in campus policy. Solicitations of membership dues do not require such advance approval and are not fundraising within the meaning of this article. All fundraising campaigns shall be coordinated through the campus development office. Campus alumni associations may accept gifts only if the associations comply with the financial policies of this article, including, for alumni associations separate from the state, maintaining state and federal tax-exempt status. Campus alumni associations shall acknowledge and thank donors who have made gifts in a manner consistent with campus development policies.
- (b) A campus alumni association shall advise donors that any restrictive terms and conditions attached to gifts for the campus are subject to campus approval.
- (c) All gifts for the benefit of a campus alumni association shall be reported by the association to the campus president or designee.

Note: Authority cited: Sections 89030 and 89031.1, Education Code. Reference: Sections 89030 and 89902, Education Code.

Section 42397.4. Financial Activities.

- (a) Financial Control: Financial activities of a campus alumni association shall be administered and reported to its governing body in accordance with prudent business practices, generally accepted accounting principles, and this article.
- (b) State Funds: State Funds shall not be transferred to a campus alumni association. Payments for commensurate value received are permitted, but gifts or unrestricted grants are not.
- (c) Submission of Budget and Report of Expenditures: The campus alumni association shall submit its budget to the campus president for review at least 30 days prior to the commencement of the fiscal year. Within 180 days of the close of each fiscal year, the campus alumni association shall submit to the campus president a detailed report comparing budgeted to actual expenditures by fund source. Upon request, a campus alumni association shall submit to the president, within 30 days of such request, interim financial information.
- (d) Bonding and Insurance: The governing body of a campus alumni association shall make an express determination of the appropriateness, necessity, and amounts of any bonds for officers and staff members. General liability and directors and officers liability insurance also shall be obtained in amounts determined annually by the governing body to be reasonable, appropriate, and necessary. The insurance may be provided by a campus auxiliary organization. Any general liability insurance obtained by or on behalf of a campus alumni association shall name the campus as an additional insured.
- (e) Funds for Support of University Departments: Restricted funds received or unrestricted funds, including investment payout, allocated for support of campus departments or programs, shall be transferred at least annually to the campus, unless otherwise provided by the campus president, and shall be administered in accordance with campus policies and expended from campus department or program accounts.
- (f) Bank Accounts: Only the following expenditures for campus alumni association activities may be made from bank accounts:

- (1) payments for goods, facilities, and services including salaries of staff, if the goods, facilities, and services are in connection with official activities of the campus alumni association;
 - (2) payments for audit, tax preparation, and legal fees;
 - (3) payments to donors and members to refund contributions and dues as permitted by law, or to return overpayments pursuant to a donor's or member's request;
 - (4) payments to other organizations of donations or other remittances made in error;
 - (5) transfers to the campus or a campus auxiliary organization;
 - (6) travel expenses reimbursement, scholarships, support of campus activities; and
 - (7) legally appropriate payments from its bank account to support ballot measures beneficial to the university and endorsed by the trustees.
- (g) Disbursements: All disbursements on behalf of a campus alumni association shall be approved by an officer or employee designated by the governing body. The governing body of the campus alumni association shall specify an amount beyond which checks must bear the signatures of two persons designated by the governing body.
- (h) Financial Statements: Financial statements and expenditures by a campus alumni association shall be in accordance with campus policies, with detailed budgets approved by the campus alumni association's governing body.
- (i) Payments to University Employees: A campus alumni association shall not (a) directly or indirectly employ, (b) supplement the salary of, or (c) provide any consulting fees, loans, or perquisites to campus employees outside of established personnel policies and practices of the California State University.
- (j) Payments to Directors and Officers: Except for reimbursement for expenses incurred on its behalf, a campus alumni association shall not pay any salaries, consulting fees, loans, or perquisites to a campus alumni association director, officer, or volunteer without the campus president's prior written approval.
- (k) Deposit of Gifts to the Campus: Campus funds or gifts payable to the California State University shall not be deposited with or transferred to a campus alumni association.
- (l) Solicitation Literature: When a fundraising campaign has been approved by the campus president, a campus alumni association's solicitation literature shall make it clear when gifts are to be made payable to the campus alumni association. Each campus alumni association shall develop a procedure to document when gifts intended for it have erroneously been made payable to the campus and, when such documentation is provided, the campus may issue an exchange check to a campus alumni association.
- (m) Gift Expenses: If charges against gifts are to be made for costs of administering a gift to the campus alumni association, the campus alumni association shall include in its literature a statement to that effect. The charges shall be approved by the campus president and the campus alumni association's governing body, and the nature of such charges shall be disclosed in the campus alumni association's audited financial statement.
- (n) Report to Registry of Charitable Trusts and Statement of Domestic Nonprofit Corporation: Complete copies of the campus alumni association's annual report to the State Registry of

Charitable Trusts and bi-annual Statement of Domestic Nonprofit Corporation shall be provided by the campus alumni association to the campus president, at the time the report or statement is filed.

- (o) **Political Activities:** No substantial part (as those terms are used in the Internal Revenue Code and regulations) of the activities of a campus alumni association shall attempt to influence legislation, or participate or intervene in any political campaign in support of or opposition to legislation. No part of those activities may be on behalf of any candidate for public office. However, advocacy on behalf of the campus is permitted if it is consistent with the legislative, budgetary, and electoral objectives of the university, pursued in coordination with the campus president, consistent with state law, the Internal Revenue Code and regulations, and in accordance with the articles and bylaws of the campus alumni association.
- (p) **Conflicts of Interest:** Business transactions involving the campus alumni association and the personal or business affairs of a director, officer, or staff member shall be approved in advance by the governing body. In addition, directors, officers, and staff members of a campus alumni association shall disqualify themselves from making, participating in making, or in any way attempting to use their official positions to influence a decision in which they have or would have a financial interest, as provided in Government Code Section 87100 and the definitions of the Political Reform Act and its implementing regulations, as if the director, officer, or staff member were a state employee. A financial interest exists if it is reasonably foreseeable that the decision will have a material financial effect on the director, officer, or staff member or his or her immediate family, or on any business entity in which a \$2,000 or more investment is held; any real property in which a \$2,000 or more interest is held; any source of income of \$500 or more received within the past 12 months; any donor of gifts aggregating \$250 or more received in the past 12 months; or any business in which a position of management is held.
- (q) **Services to Constituency Alumni Groups:** With the approval of the campus president or designee, a campus alumni association may provide to officially recognized constituency alumni groups the following, subject to the same conditions pertaining to the campus alumni association: cash management, disbursement, and accounting services; gift reporting; and, in appropriate cases, coverage under the campus alumni association's insurance policies, inclusion in the campus alumni association's financial statements, external audits and tax reporting, or use of the campus alumni association's tax identification number.

Note: Authority cited: Sections 89030 and 89031.1, Education Code. Reference: Sections 89030 and 89902, Education Code.

Section 42397.5. Audit.

- (a) A campus alumni association shall permit the Chancellor, the university auditor, the campus president, and the campus internal auditor or designee to inspect and audit its books and records as well as those of its financial institution(s) as relates to the campus alumni association's account(s). In addition, a campus alumni association shall permit the university auditor and the campus internal auditor to review directly all bank account records.
- (b) A campus alumni association with annual gross revenues in excess of \$1 million shall have an annual audit of its financial statements performed in accordance with generally accepted auditing standards and in accordance with any additional systemwide procedures prescribed by the Chancellor or designee, by a certified public accountant selected by the alumni association.
- (c) A campus alumni association with annual gross revenues in excess of \$500 thousand and less than \$1 million shall have an annual review of its financial statements performed by a

certified public accountant selected by the alumni association in accordance with standards for accounting and review services and in accordance with any additional systemwide procedures prescribed by the Chancellor or designee.

- (d) A campus alumni association with annual gross revenues less than \$500 thousand shall have its financial statements compiled by a certified public accountant selected by the alumni association in accordance with standards for accounting and review services and in accordance with any additional systemwide procedures prescribed by the Chancellor or designee.
- (e) A campus alumni association whose assets and records are in the custody of an auxiliary organization shall present its financial position through supplemental schedules attached to the audited financial statement of the auxiliary organization in sufficient detail to fully represent the financial position and activities of the alumni association. These schedules shall be subjected to the same procedures as the auxiliary's statements and in accordance with any additional systemwide procedures prescribed by the Chancellor or designee.
- (f) When completed, the campus alumni association's financial statements shall be furnished to the campus president or designee on the date designated by the campus president or designee.
- (g) A campus alumni association shall make its financial statements available upon request for public inspection within a reasonable period of time.

Note: Authority cited: Sections 89030 and 89031.1, Education Code. Reference: Sections 89030 and 89902, Education Code.

Section 42397.6. Organization of Constituency Alumni Groups.

- (a) A constituency alumni group organized after the effective date of this article shall be organized within and as part of the campus alumni association.
 - (1) A constituency alumni group representing a school, college, department, or other unit shall secure the endorsement of the school, college, department, or other unit. The administrative head of the represented unit or designee shall periodically review and provide advice concerning the planned activities of the constituency alumni group, and shall serve as an *ex officio* voting or nonvoting member of the governing body of the constituency alumni group, if any, or of any executive or similar committee empowered to act for the governing body, if any, of the constituency alumni group.
 - (2) A constituency alumni group, as part of the campus alumni association, shall comply with all applicable campus policies and campus alumni association policies.
- (b) A constituency alumni group separately organized prior to the effective date of this article shall be organized within and become a part of the campus alumni organization and shall comply with subdivision (a), unless the campus president enters into an agreement with the constituency alumni group which provides as follows:
 - (1) The separate constituency alumni group agrees to the following characteristics:
 - (a) is organized and operated solely for the benefit of the campus and the alumni of a school, college, department, or other campus administrative, academic, geographic, or other constituent unit;

- (b) has as its purpose providing service and support to its members, the alumni of a constituent unit, and to the university;
 - (c) does not restrict membership or benefits of membership on the basis of race, religion, national origin, gender, or sexual orientation;
 - (d) recognizes the unique role of the campus president or designee in setting campus or campus unit priorities; and irrevocably dedicates its assets for the benefit of the campus or appropriate unit of the campus. In the event of the group's dissolution, its assets shall be transferred to the campus alumni association, the campus, an appropriate unit of the campus, or an auxiliary organization designated by the campus for purposes consistent with the purposes of the group and the terms of any individual gifts that are part of its assets, and, if a corporation, in conformance with the California Nonprofit Corporation Laws.
 - (e) A constituency alumni group representing a school, college, department, or other unit shall secure the endorsement of the school, college, department, or other unit. The administrative head of the represented unit shall periodically review and provide advice concerning the planned activities of the constituency alumni group and shall serve as an *ex officio* voting or nonvoting member of the governing body of the constituency alumni group, if any, or of any executive or similar committee empowered to act for the governing body, if any, of the constituency alumni group.
- (2) The separate constituency alumni group agrees to obtain and maintain recognition, as a separate constituency alumni group by submitting the following to the campus president or designee on an annual basis or otherwise as specified by the campus president:
- (a) a current list of officers, members of the governing body, and the principal contact person for the group;
 - (b) a statement of the group's purpose and goals consistent with subsection (a) and copies of the current enabling documents of the group (*i.e.*, bylaws, constitution, articles of incorporation, or other governing document);
 - (c) a current roster of names and addresses of donors and members, unless such records are otherwise maintained by the campus;
 - (d) a statement signed by the officers/representatives of the group that the governing body has read and formally voted that it will comply with this article and the agreement;
 - (e) a copy of the group's annual financial statements;
 - (f) for a group with accounts at a financial institution, a list identifying all such accounts, including the institution's name and address, the group's account numbers, and a statement signed by an appropriate officer or representative of the group authorizing the campus to obtain upon request from the financial institution information, records, or photocopies of transactions relating to the accounts;
 - (g) for an incorporated, tax-exempt organization, (A) a copy of the organization's state and federal tax-exempt status determination letter; (B) a copy of the organization's most recent Internal Revenue Service Form 990; and (C) a list of the types of activities, including fundraising and membership drives, the organization intends to undertake and how the organization intends to financially support these activities.

- (3) The provisions of this article shall be incorporated by reference;
- (4) The exchange of value between the campus and the constituency alumni group shall be expressed and may include provision of facilities and other tangible as well as intangible exchanges;
- (5) A license agreement for use of the campus name and symbols; and
- (6) The term of the agreement.
- (7) Privileges granted including authorization to use the name of the campus or other institutional unit. Without authorization, no group may:
 - (a) represent itself as raising funds or otherwise providing support on behalf of or for the benefit of the campus, or any part of it, including its alumni;
 - (b) use the name of the campus or any of its facilities or programs either expressly or by implication in connection with its activities; or
 - (c) use campus facilities or resources in connection with its activities.
- (8) If a separate constituency alumni group does not comply with this article, the campus president or designee shall by written notice require the constituency alumni group to comply within 90 days or recognition as a constituency alumni group will be withdrawn.
 - (a) In the event the group fails to comply within this time period, the campus president or designee may withdraw the constituency alumni group's recognition. In appropriate circumstances, the campus president may extend the period for compliance when action to remedy noncompliance is in progress.
 - (b) Upon withdrawal of recognition, the assets of the constituency alumni group shall be transferred to the campus alumni association, the campus, or the designated campus auxiliary organization for purposes consistent with the purposes of the group and the terms of any individual gifts that are part of the assets.
- (9) Use of the campus or unit name and symbols, including mascot or other identifying mark by a separate constituency alumni group after July 1, 2003, is prohibited unless the group has entered into an agreement and has been recognized by the campus under the provisions of this article.

Note: Authority cited: Sections 89030 and 89031.1, Education Code. Reference: Sections 89030 and 89902, Education Code.

Section 42397.7. Fundraising by Constituency Alumni Groups.

Fundraising activities of constituency alumni groups shall be governed by the fundraising provisions of this article applicable to campus alumni associations.

Note: Authority cited: Sections 89030 and 89031.1, Education Code. Reference: Sections 89030 and 89902, Education Code.

Section 42397.8. Financial Activities of Constituency Alumni Groups.

Financial activities of constituency alumni groups shall be governed by the financial activities provisions of this article applicable to campus alumni associations.

Note: Authority cited: Sections 89030 and 89031.1, Education Code. Reference: Sections 89030 and 89902, Education Code.

Section 42397.9. Audit of Constituency Alumni Groups.

The audit requirements of constituency alumni groups shall be governed by the audit provisions of this article applicable to campus alumni associations.

Note: Authority cited: Sections 89030 and 89031.1, Education Code. Reference: Sections 89030 and 89902, Education Code.

Section 42397.10. Waiver.

For good cause and to address circumstances unique to a campus, a campus president may request that the Chancellor waive certain provisions of this article for a particular group or groups on that campus. Such waiver shall be in writing and shall specify the reasons for the waiver. Any waiver shall be subject to such terms and conditions as deemed advisable by the Chancellor.

Note: Authority cited: Sections 89030 and 89031.1, Education Code. Reference: Sections 89030 and 89902, Education Code.

Section 42397.11. CSU Alumni Council and Systemwide Constituency Alumni Groups.

- (a) The Chancellor may recognize a CSU Alumni Council having systemwide jurisdiction and possessing rights to represent the CSU alumni organizations before the Trustees. The Council shall be governed by the provisions of this article applicable to campus alumni associations with the system and the Chancellor replacing the campus and the campus president in those provisions. Systemwide constituency alumni groups may be recognized and regulated by the Chancellor as provided in the provisions of this article relating to campus constituency alumni groups.
- (b) Systemwide constituency alumni groups shall relate to the CSU Alumni Council as provided in the provisions of this article addressing campus constituency alumni groups and their relationship to the campus alumni associations. The provisions of the campus constituency alumni groups shall apply to systemwide constituency alumni groups with the Chancellor or designee assuming the rights and responsibilities of the campus president or designee.

Note: Authority cited: Sections 89030 and 89031.1, Education Code. Reference: Sections 89030 and 89902, Education Code.

**Memorandum of Agreement Between
California State University, Sacramento and
Sacramento State Alumni Association**

This Memorandum of Agreement (MOA) is entered into by and between California State University, Sacramento (The University) and Sacramento State Alumni Association (The Association), in accordance with the provisions of Article 15 (commencing with Section 42397) of Subchapter 5, Chapter 1, Division 5 of Title 5 of the California Code of Regulations (hereafter referred to as Article 15). This MOA together with Article 15 and any addendums in writing (which are incorporated herein by reference) define the relationship between the University and the Association.

WHEREAS, the University recognizes and acknowledges that the Association represents the largest of all university-affiliated constituencies, the most important University constituency of those whose lives have been directly influenced by the University; and

WHEREAS, the Association affirms that its primary mission is to advance the welfare and interests of the University and its alumni and declares such in its bylaws; and

WHEREAS, the University respects and endorses the Association's mission and recognizes the importance of the Association in advancing the University's mission; and

WHEREAS, the University recognizes that the Office of Alumni Relations is an integral part of the University's Division of University Advancement; and

WHEREAS, the Association and the University desire to memorialize their understanding of their relationship;

NOW, THEREFORE, the University and the Association acknowledge and agree as follows:

1. Representing Parties

The University is a campus of the California State University, established in statute under the stewardship of the Trustees of the California State University, which is the State of California acting in a higher education capacity. The president of the University possesses authority to sign this MOA by delegation from the Trustees of California State University.

The Association is a nonprofit corporation organized under the laws of the State of California, possessing both state and federal tax-exempt status. The officer of the Association executing this MOA possesses authority to do so from the Association's board of directors.

The Division of University Advancement is a unit of the University through which alumni activities are coordinated, including the reporting of Association activities. The vice president of University Advancement possesses the authority to execute this MOA.

The Office of Alumni Relations is a department of University Advancement. The Assistant Vice President of Alumni Relations possesses the authority to execute this MOA.

2. Recognition as the University's Single Campus-wide Alumni Organization

In consideration of the Association's agreement to enter into this MOA, the University recognizes the Association as the University's only campus-wide alumni organization.

Notwithstanding the provisions of section 42397.6, subdivision (b) of Article 15, the University agrees that it will not enter into agreements with nor recognize any other or separate constituency alumni groups. The only constituency alumni groups that may represent themselves as alumni groups of the University are chapters and affiliates chartered by the Association in accordance with the by-laws of the Association.

For purposes of this MOA, the term "constituency alumni groups" shall be defined as agreed in writing from time to time by the Vice President for University Advancement on behalf of the University and the President on behalf of the Association. Any written agreement shall be considered incorporated by reference into this MOA.

Use of the term "Alumni Association" or "Alumni Chapter" or similar terminology is restricted to the Sacramento State Alumni Association. No other campus organization may use the University's name in relation to the phrase "Alumni Association" nor may any organization use the University nor connect "Alumni Association/Organization/Society" or similar without the approval of the Association.

3. Benefits and Privileges Granted by the University to the Association.

The University grants a license to the Association to use the campus name and symbols consistent with established University policy and practice.

The Association may create and utilize a unique symbol or logo to identify the Association as the University's recognized alumni association.

The Association is authorized to use the University's facilities, equipment, and personnel in accordance with established University policy and practice.

The Association is authorized to use the University's database of alumni, students, and supporters of the University in accordance with established University policy and practice.

The Association shall continue to be authorized to own and operate autonomously an alumni center on the University campus. As service providers, rental fees may be assessed to cover operations and staffing related to the facility and its events.

The University recognizes that the Office of Alumni Relations exists to carry out programs and opportunities to serve the University and its Alumni Association. The University releases the Assistant Vice President—and all staff in the Office of Alumni Relations—to conduct business on behalf of the Association.

4. Agreements by the Association.

The Association shall comply with all policies of the Board of Trustees and the University including the provisions of Article 15, which by this reference are made part of this MOA.

The Association shall operate solely for the benefit of the University and its alumni. It is recognized and agreed that benefits to the University may include direct and indirect benefits to the University's current students, such as:

- Funds dedicated to scholarships for incoming freshmen, continuing undergraduates and graduate students;
- Facilitating opportunities for students to network with alumni in their academic or professional field of choice.

The Association shall pursue as its purpose providing service and support to its members, the alumni of the campus and to the University.

The Association recognizes the unique role of the University President in setting campus priorities. The Association shall operate so as to be in harmony with the University's goals and the University's methods of achieving its goals. Through its Assistant Vice President, the Association shall inform the Vice President for University Advancement of its planned activities so they may be coordinated with University events, policy positions, and efforts.

The Association shall comply with the financial management and record keeping requirements of Article 15 and with established University policy and practice.

The Association has the sole authority to enter into agreements with affinity partners for goods or services relevant to alumni, future alumni, parents and friends and has the responsibility to manage such programs in accordance with California Education Code Section 89090. Royalties from these programs will be deposited into Association accounts and used to serve the best interest of the University.

The Association acknowledges and respects hiring procedures as established by the University, the campus and the State of California.

The Association shall comply with the requirements of section 42397.3 of Article 15 regarding fund raising campaigns. For purposes of this MOA, the term "fund raising campaigns" shall be defined as agreed in writing from time to time by the Vice President for University Advancement on behalf of the University and the President of the board of directors on behalf of the Association. The written agreement shall be considered to be incorporated by reference into this MOA.

5. Exchange of Value

The University shall benefit from the Association in the following ways:

The Association shall build community by organizing and executing a comprehensive program of events, programs, and activities designed to appeal to a broad spectrum of alumni with the purpose and intent of not only maintaining and enhancing alumni interest in their University, but also increasing the value of their association with their alma mater.

It shall organize and execute alumni honor and recognition programs, pursuing appropriate publicity for the accomplishments of those honored to enhance the reputation and image of the University.

It shall operate and maintain an Alumni Center on campus for the benefit of creating a welcoming campus and providing event space for academic, alumni, student, and community events.

It shall pursue an outreach program in the operation of its alumni center designed to expose more segments of the community to the campus.

It shall fundraise for and provide scholarships to undergraduate and graduate students of the University.

It shall work to acquire and retain members of the Association and shall provide a comprehensive program of services and benefits to its members.

It shall maintain contact with its membership through frequent online or printed news and information about alumni, the Association, and the University.

It shall engage University representatives in the leadership of the Association as articulated in the Association bylaws, by inviting the following ex-officio voting members to serve on the Association Board:

- The President of the University or their designee;
- The Vice President of University Advancement;
- The Assistant Vice President of Alumni Relations/Alumni Association;
- Academic Senate representative;
- USA Staff representative;
- ASI President;

Retirees Association representative;
University Foundation Board representative.

Under the authority of the University President, it shall ensure that all constituency alumni groups are in compliance with Article 15 and the policies of the University.

The Association shall benefit from the University in the following ways:

The Association may use the University's name and symbols, including the name of the University mascot or other identifying marks that would cause the public to assume it is dealing with the University or a University recognized group. Such use may include, but is not limited to, use of the University name as part of the Association's name and use of the University's name, logo, symbols, seal, and other identifying marks in its communications and other publications.

The Association may represent itself as the single campus wide alumni association of the University.

The Association may use University resources, including, but not limited to, any campus auxiliary investment services, as approved by the University President.

The University shall communicate with the Association keeping it aware of University goals and directions.

6. Term of MOA

This MOA shall commence upon execution by both parties and shall continue for a period of three years. Unless previously extended in writing by both parties, the MOA shall expire on June 30, 2023.

7. Construction of MOA

This MOA shall be interpreted in harmony with Article 15. Should any provision of this MOA be or be interpreted to be in conflict with Article 15, Article 15 shall supersede and govern.

8. Copy to Governing Board Member

A copy of this MOA together with Article 15 shall be given to all members of Association's governing board of directors and to any new member when the new member takes office.

9. Non-Compliance

Should it appear to the University that the Association is in material non-compliance with any provision of Article 15 or this MOA, it shall notify the Association in writing of such

non-compliance and provide the Association an opportunity to meet with the University President or designee to discuss the non-compliance and a reasonable time to correct the non-compliance. Should the non-compliance remain uncorrected beyond the time specified, the University may place on probation, suspend, or terminate its recognition of Association as the University's alumni organization.

By signing below, the University and the Association manifest their agreement to all of the provisions of this Memorandum of Agreement.


THE UNIVERSITY

By: **Robert Nelsen**

Dr. Robert S. Nelsen, President

Date: **07/27/20**


THE ASSOCIATION

By: 

Ron T. Brown (Jul 27, 2020 11:32 PDT)
Ron Brown, President 2020-21

Date: **07/27/20**

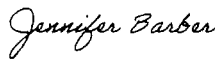
UNIVERSITY ADVANCEMENT

By: 

Lisa Cardoza, Vice President

Date: **07/26/20**

THE OFFICE OF ALUMNI RELATIONS

By: 

Jennifer Barber, Assistant Vice President

Date: **07/23/20**

Addendum No. 1 to MOA

**Between California State University, Sacramento and
Sacramento State Alumni Association**

"Fundraising Campaigns"

(A) For purposes of section 42397.3 of Article 15, the term "fundraising campaigns" means and includes:

- (1) A campaign, as that term is customarily understood, organized and conducted to solicit donations in cash or kind for a specific capital project or to reach a specific monetary goal with an established beginning date and/or ending date or goal; and
- (2) The solicitation of monetary support for the construction, retirement of debt for construction, maintenance or improvement of the alumni center; and
- (3) Fundraising conducted by a chapter of the Association in conjunction with and for the benefit of a college, department, school or other academic units; and
- (4) Solicitation of donations from members of the Association for scholarships.

(B) The term "fundraising campaigns" does not include:


- (1) Solicitation of donations by the Assistant Vice President from assigned prospects;
- (2) Solicitation of alumni programming funds by the Association or its constituency groups in conjunction with Annual Giving;
- (3) The scholarship solicitation mailing conducted on our behalf by the Annual Giving office each fall;
- (3) Solicitation of sponsorships for special or annual events of the Association, such as the Distinguished Alumni Awards Banquet, homecoming events and activities, pre-game parties or similar events, provided that prospective sponsors are coordinated with the Vice President for University Advancement; and
- (4) Pursuing agreements with commercial vendors of the type generally associated with Alumni Associations, such as affinity credit cards, insurance programs, rental car discounts, and advertising or sponsorship of membership publications.

(C) Notwithstanding subdivision (B), the Association agrees that the Assistant Vice President will inform the Vice President for University Advancement of any planned solicitations for any purpose.

(E) Further, the Association agrees that it will consider the University's established fundraising schedule whenever it plans to solicit funds, including programming donations which have replaced membership dues.


(F) Once approved in writing as required by Article 15, a fundraising campaign may continue to completion without further approvals.

THE UNIVERSITY

By: 
Lisa Cardoza, Vice President

Date: 07/26/20

THE ASSOCIATION

By: 
Ron T. Brown (Jul 27, 2020 11:32 PDT)
Ron Brown, President 2020-21

Date: 07/27/20

Addendum No. 2 to MOA

**Between California State University, Sacramento and
Sacramento State Alumni Association**

"Constituency Alumni Groups"

(A) For purposes of Article 15 the term "constituency alumni group" means and includes only a chapter, network, or affiliate group of the Sacramento State Alumni Association which has been chartered in accordance with the by-laws of the Sacramento State Alumni Association.


(B) No organization may identify itself as an alumni organization affiliated with California State University, Sacramento, or use the term "alumni" in its name, literature or in any manner which includes a reference to California State University, Sacramento, unless it is a chapter, network, or affiliate of the California State University, Sacramento, Alumni Association.


(C) The term "constituency alumni group" does not include booster or support groups for specific activities, teams, departments, schools, or colleges, such as "Friends of the Sacramento State Library" or "Hornet Club," provided the group or organization does not use the term "alumni" in its name or literature.

(D) California State University, Sacramento, through its President, agrees to enforce the terms and restrictions of this addendum.

THE UNIVERSITY

THE ASSOCIATION

By: 
Lisa Cardoza, Vice President

By: 
Ron T. Brown (Jul 27, 2020 11:32 PDT)
Ron Brown, President 2020-21

Date: 07/26/20

Date: 07/27/20

Signature: Robert Nelsen
Robert Nelsen (Jul 27, 2020 11:52 PDT)

Email: nelsen@csus.edu



Sacramento State Alumni Association Board Member's Responsibilities/Commitment Form

As a board member, you have assumed certain responsibilities and agree to make certain commitments. This form outlines these expectations and responsibilities. Please review the statements and sign below.

- I will seek to be fully informed about the University and its role in the state and in higher education, and of the Alumni Association's mission, programs, policies and services.
- I will prepare for and regularly participate in board and committee meetings. As an active board member, I will ask questions, deliberate, and then support policies and decisions established. I will serve on at least one committee and play a leadership role and/or undertake special assignments.
- I will represent the Association and the University with pride at community and campus events, organizations, and with private individuals. I will attend at least one campus event per semester.
- I will make an annual donation at the Alumni Circle level (\$500+) or greater, payable over the course of each fiscal year.
- I will partner with the board, assistant vice president, and development officers in annual Alumni fundraising activities using personal influence with others, individuals, corporations, and foundations.
- I am willing to use my sphere of influence to contribute to the further development of the Board and committees. I commit to identifying potential members and will assist in the recruitment of nominees to serve in the future.



Sacramento State Alumni Association Board Member Job Description

Job Title:	Member, Board of Directors
General Duties:	To determine policies and procedures for the conduct of the business and affairs of the Alumni Association, California State University, Sacramento (Association); to assist in raising funds to finance the Association and its programs through membership development and monetary support of Association events; to serve as an ambassador for the Association and its programs to the public and the university community; and to fulfill a fiduciary duty in monitoring the performance of Association.
Term of Office:	Three years commencing on July 1 unless selected to fill an unexpired term. Directors may be eligible to serve up to two consecutive three-year terms. (<i>SSAA Bylaws, Article VI, Section 4</i>)
Responsible to:	Association President and Board Colleagues
Roles and Responsibilities of the Full Board	<ol style="list-style-type: none">1. <u>Strategic Planning</u>. Establish the goals, strategies and objectives to enable the Association to fulfill its mission2. <u>Policy Administration</u>. Establish policies for administering the programs and activities which are consistent with the mission and goals of the Association.3. <u>Resource Development</u>. Actively participate in membership and fund development activities to secure funds for current expenses, and support activities to fund current and long term obligations for the Sacramento State Harper Alumni Center.4. <u>Finance</u>. Ensure that the financial affairs of the Association are conducted on a responsible basis in accordance with established policies and in recognition of the Board's fiduciary responsibility with respect to dues, donations and scholarship funds.

5. Community and Campus Relations. Understand the mission and goals of the Association and serve as an ambassador in building campus and community partnerships and support.
6. Personnel. Participate in recruitment of Board members. Delegate to the Assistant Vice President responsibility to employ Association staff to supplement that provided by the University.

**Duties of each
Board Member:**

1. Attend bi-monthly Board Meetings – 5:30-8:00 p.m. at the Alumni Center (5 meetings and 1 business day retreat per year)
 - Plan your schedule to attend regularly, be on time and stay until business is concluded.
 - Be prepared to discuss agenda items.
 - Contribute knowledge and expertise by expressing your point of view.
 - Consider other points of view, make constructive suggestions and help the Board make decisions that benefit the Association and its members.
2. Serve as an active member and attend meetings of at least one standing committee.
3. Be a financial supporter of the Association by making an annual gift of at the Alumni Circle level (\$500+) or greater each fiscal year.
4. Participate in Association events and programs. Attend at least two major events each year, one each semester (e.g. Scholarship Reception, Homecoming, Distinguished Alumni Awards).
5. Represent the Association and the University with pride at community and campus events, and with organizations and/or private individuals.
6. Be informed about the Association, its mission, programs, policies and services to alumni and students.
7. Assist in membership recruitment and retention.



SACRAMENTO STATE ALUMNI ASSOCIATION

Board Annual Give & Get Policy

Each member of the Board of Directors of the Sacramento State Alumni Association assumes certain responsibilities and agrees to certain commitments. These expectation and responsibilities are outlined in the “Board Member’s Responsibility/Commitment Form.”

The Board’s Annual Give & Get Policy deals specifically with the role of each Board member to “give” financially to the Alumni Association and use their spear of influence to assist in efforts to “get” funds for the association and the university.

Specifically, each board member is to provide an annual “give” of \$500. In addition, all members of the Board of Directors are expected to partner with the board, executive director, and development officers in annual Alumni fund-raising activities using personal influence with others, individuals, corporations and foundations.

“Give” Defined

In adopting this policy, recognition is given to the fact that financial support can take many forms. Therefore, the “give” requirement may be met in a number of ways, including:

- Cash contributions, including business contributions
- In-kind donation of goods
- Sponsorship of Association sponsored events
- Contributions to scholarship funds
- Contributions to capital campaigns
- Other measures as approved by the Executive Committee

“Get” Defined

In addition to the above “give” provisions, Board members shall be responsible for assisting the Association and University in the obtaining of contributions of cash, goods, or services. This includes, but is not limited to, securing contributions to the University, the sale of tickets and sponsorships, securing contributions to scholarships, and securing contributions to capital campaigns.

Reporting

The Executive Director of the Association is responsible for maintaining records to substantiate the fulfillment of the Annual Give & Get Policy. Members should advise the Executive Director of their contributions and solicited contributions as they occur. The Executive Director shall produce an annual report at the end of each fiscal year containing a summary of each Board Member’s annual give and get amounts.

Ex-Officio Directors

There are nine ex-officio Director positions on the Board. Each of these positions is directly appointed by an entity other than the Alumni Association. In addition, each of these positions play a critical role in meeting one of our Key Priorities to have a strong campus connection.

The “Give” portion of this policy shall be voluntary for ex-officio Directors. However, each ex-officio Director shall play an active role and abide by the “get” portion of this policy.



SACRAMENTO STATE ALUMNI ASSOCIATION

Conflict of Interest Policy

Members of the board of directors (board members) of the Sacramento State Alumni Association (hereinafter referred to as "SSAA") shall conduct themselves with integrity and honesty and act in the best interests of the SSAA. Disclosure by a board member of a potential or actual conflict of interest is required by the standard of good faith and for both the benefit of the SSAA and the protection of each individual.

This Conflict of Interest policy has been created for the protection of the SSAA's integrity and its 501(c)(3) status, and for the protection of the officers and Board members. We, the undersigned officers, individually, and during our terms of office, shall abide by the following Conflict of Interest policy:

- Board members and/or their families shall not use their relation to the SSAA for financial, professional, business, employment, personal, and/or political gain.
- A conflict of interest exists when both of the following conditions are true:
 - A board member has to participate in the deliberation or decision of any issue of the SSAA.
 - That same board member and/or his or her extended family has financial, professional, business, employment, personal, and/or political interests outside the SSAA that could predispose or bias the board member to a particular view, goal, or decision.
- Board members shall declare to the officers of the SSAA conflicts of interest (stating the nature of the conflict and pertinent information as appropriate) between their duties of the SSAA and their extended families' financial, professional, business, employment, personal, and/or political interests.
- When a conflict of interest is declared, the board member shall not use his or her personal influence of position to affect the outcome of any related vote and shall leave the room during deliberations and the vote.
- The minutes of the meeting shall reflect that a conflict of interest was declared.
- Board members shall not:
 - Use the SSAA's name, influence, or resources for their benefit or gain when running for any public elected office or while serving as an elected official.
 - Directly or indirectly use their current SSAA position, the SSAA name, or the SSAA organization for or against any specific candidate for elected public office. Doing so is contrary to federal tax laws and the bylaws, guidelines and policies of the SSAA.

This policy has been reviewed and accepted by the SSAA executive committee on an interim basis until such time as it can be fully incorporated into the Bylaws.

Approved on the 8th day of November, 2010.
Executive Committee, Board of Directors, Sacramento State Alumni Association



SACRAMENTO STATE ALUMNI ASSOCIATION

Whistleblower Policy

If any Sacramento State Alumni Association (hereinafter referred to as "SSAA") member reasonably believes that some policy, practice, or activity of the SSAA or its Board is in violation of law, a written complaint must be filed by that SSAA member with the SSAA Executive Director and/or the SSAA Board President.

It is the intent of the SSAA to adhere to all laws and regulations that apply to the organization and the underlying purpose of this policy is to support the organization's goal of legal compliance. The support of all board members is necessary to achieving compliance with various laws and regulations. An SSAA member is protected from retaliation only if the SSAA member brings the alleged unlawful activity, policy, or practice to the attention of the SSAA Executive Director and/or the SSAA Board President and provides them with a reasonable opportunity to investigate and correct the alleged unlawful activity. The protection described below is only available to SSAA members that comply with this requirement.

The SSAA Board will not retaliate against any SSAA member who in good faith, has made a protest or raised a complaint against some practice of the SSAA, or of another individual or entity with whom the SSAA has a business relationship, on the basis of a reasonable belief that the practice is in violation of law, or a clear mandate of public policy.

The SSAA Board will not retaliate against any SSAA members who disclose or threaten to disclose to University leadership or a public body, any activity, policy, or practice of the SSAA that the SSAA member reasonably believes is in violation of a law, or a rule, or regulation mandated pursuant to law or is in violation of a clear mandate of public policy concerning the health, safety, welfare, or protection of the environment.

This policy has been reviewed and accepted by the SSAA executive committee on an interim basis until such time as it can be fully incorporated into the Bylaws.

Approved on the 8th day of November, 2010.
Executive Committee, Board of Directors, Sacramento State Alumni Association

Sacramento State Alumni Association (SSAA)

Fixed Asset Policy

This policy was approved by the Sacramento State Alumni Association Board of Directors

on March 29, 2021

Definition:

A capital purchase comprises furniture, fixtures, equipment, software, building improvements, etc. that meet two criteria:

1. A useful life of more than one year; and
2. Cost of more than \$2,500.

The SSAA Board of Directors has established \$2,500 as the threshold amount for capitalization. This amount should reflect the aggregate cost when a large quantity of furniture and equipment items are purchased. SSAA will expense the full acquisition cost of tangible property below this threshold in the year of purchase.

Recordkeeping:

SSAA accounting staff shall maintain a list of fixed assets showing the date of the acquisition, its cost, and a schedule for depreciation of the asset. SSAA shall keep on file documentation for each purchase. Annual depreciation expense will be included in SSAA's (Alumni Center) annual operating budget.

For each purchase, the accounting and business officer shall evaluate whether the acquisition will have an impact on insurance coverage, determine if present coverage valuations are adequate, and obtain additional coverage if necessary.

Depreciation is computed by the straight-line method over the estimated useful lives of the assets, generally 3-20 years. Special circumstances shall be reviewed with the Finance Committee.

The Executive Director/AVP annually reviews the inventory of fixed assets, updating records for disposals or impairment.

Sacramento State Alumni Association (SSAA)

Spending Policy

*This policy was approved by the Sacramento State Alumni Association Board of Directors
on May 10, 2021.*

Definition:

The SSAA spending policy allows staff of the SSAA to conduct regular business based on an approved annual budget and provides the process for addressing expenses not covered by the annual budget, including the process for use of investment funds.

Expenditure Approvals:

1. Annual Budget: SSAA's annual budget which is approved by the Board of Directors covers expected expenditures for the operation of the Sacramento State Alumni Association and the Harper Alumni Center during the year indicated. Those areas covered by the approved annual budget are considered approved for expenditure.
2. Significant Unexpected Needs: This covers needs that arise and are greater than the 'Repair and Maintenance' funds approved as part of the annual budget.
 - a. Process: The executive director/AVP presents a proposal that includes cost estimates, rationale, and scope of work, including the proposed source of funds, to the Finance Committee.
 - b. Finance Committee reviews and makes recommendation to the Executive Committee.
 - c. Per SSAA Bylaws, the Executive Committee can approve or refer the request to the Board of Directors for approval, if time permits.
3. Use of Investment Funds and Earnings:
 - a. SSAA Investment Account: An annual draw from the account earnings will be approved through the budget process and deposited into the SSAA operating account for use in programming efforts. The fund may also be utilized by proposal to the Board of Directors in support of a program or initiative that supports the mission of SSAA.
 - b. Harper Alumni Center Investment Account: Fund should only be utilized by proposal to the SSAA Board to support a project directly related to maintaining the facility or enhancing the usability of the facility. Earnings will be retained and reinvested.

Sacramento State Alumni Association

**INVESTMENT
POLICY
STATEMENT**

Amended and Approved:

March 10, 2014

Reviewed and Confirmed: April 2021

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SUMMARY
INVESTMENT POLICY STATEMENT

Sacramento State Alumni Association

<u>Client's Name:</u>	Sacramento State Alumni Association
<u>Portfolio Account Detail:</u>	Sacramento State Alumni Association Custodian Account # _____
<u>Investment Objective:</u>	Generate a return in excess of the blended portfolio benchmark over a complete market cycle
<u>Withdrawal Requirement:</u>	No planned withdrawals at this time.
<u>Time Horizon:</u>	Overall portfolio allocated with a long-term time-horizon in mind.
<u>Risk Tolerance:</u>	Moderate
<u>Target Return:</u>	Over the long-term, exceed the blended portfolio benchmark, net of fees with similar risk.
<u>Target Allocation:</u>	Balanced Strategy
<u>Evaluation Benchmark:</u>	The passive indices in similar weights to the target asset allocation.

INVESTMENT POLICY STATEMENT

Sacramento State Alumni Association

This policy statement outlines the assumptions and understandings under which Sand Hill Global Advisors, LLC. (the “Advisor” or “SHGA”) is to manage the capital account of Sacramento State Alumni Association (SSAA). The content herein has been composed based upon meetings with the Board of Directors and staff in which discussions covered SSAA’s goals, attitudes, expectations, risk tolerance, desires for liquidity, and present and future cash flow requirements.

It is agreed that the Advisor will meet with the SSAA Finance Committee on an as-needed basis to report on the status of the portfolio and to receive and provide information that will aid in the management of the portfolio. This investment policy statement supersedes any existing SSAA investment policy statement and will be reviewed at least annually as to its appropriateness given any significant changes in SSAA’s needs or in light of significant shifts in the economy or the investment markets. Day-to-day contact with SSAA will be made via the telephone and e-mail.

I. ACCOUNT CIRCUMSTANCES

The investments in this capital account represent a major asset Sacramento State Alumni Association, and as such, are intended to be managed in a manner that will promote their preservation and growth in excess of inflation over the long-term.

II. INVESTMENT OBJECTIVES

SSAA seeks to achieve growth of the portfolio at a moderate rate in excess of inflation. Preservation of capital is an important consideration; therefore, portfolio volatility should be held similar to that of the evaluation benchmark as a whole.

1. Portfolio Return Objectives -

- **Total Portfolio Return:** Achieve a time-weighted, real rate of return of 3%, after fees and program costs. This return will be sought using a diversified style of investment management, providing an average annual return that will be measured over a complete market cycle which is defined as five years.
- **Blended Benchmark Return:** Over rolling five-year cycles, to achieve a return that exceeds the Blended Benchmark, net of fees with similar risk.

2. **Portfolio Risk Tolerance**- The risk to the portfolio must be moderate, since the portfolio provides a source of funds that allows SSAA to perpetuate its mission.
3. **Withdrawal Requirements**- No planned withdrawals. The SSAA Board must approve any withdrawals. SSAA staff will execute approved action with Sand Hill Global Advisors.
4. **Time Horizon**- Overall portfolio will be allocated with a long-term time-horizon in mind.
5. **Tax Considerations** - None, since this organization is tax exempt.
6. **Illiquidity** -The overall portfolio should maintain daily liquidity.

III. POLICY & ASSET ALLOCATION

1. **Diversification** -Given the objective for moderate risk with growth, the portfolio will be managed as a diversified portfolio. We believe that diversification of assets is sound investment policy and that allocation of assets across various sectors as well as types of securities will minimize risk while improving performance. Accordingly, Sand Hill Global Advisors will at no time invest more than 15% of the portfolio with a single active fund family. Additionally, Sand Hill Global Advisors shall at no time invest more than 10% (at cost) with a single passive or active fund.

Investment Vehicles - The portfolio's investments will be allocated over various asset classes, either directly or through pooled or commingled investment accounts (mutual funds and index funds), that might include domestic and foreign equities, bonds, real estate, alternative investments, and cash or cash equivalents. With each asset class, Sand Hill Global Advisors will weigh factors including expense, market efficiency, transparency of information, and diversification to determine whether direct investments or commingled investments are in SSAA's best interests.

2. Asset Allocation:

	<u>Bottom Range</u>	<u>Target</u>	<u>Top Range</u>
TOTAL EQUITY	40%	52%	65%
TOTAL FIXED INCOME	20%	30%	40%
REAL ASSETS	0%	8%	15%
ABSOLUTE RETURN	0%	8%	15%
CASH/CASH EQUIVALENTS	0%	2%	15%

- Generally, the allocation will be within the ranges shown above; however, SHGA is permitted to have a more defensive position that may result from significant cash inflows. The ultimate implementation will be achieved over a transitional period of time involving staggered commitments. Additionally, SHGA will seek the approval of the SSAA Finance Committee whenever deviating the targeted strategy in excess of 10 points of risk, as defined by the combined weight of equities and real assets.
- 3. **Rebalancing:** The portfolio will be reviewed regularly by SHGA and rebalanced whenever the weighting of a major asset class deviates or a tactical opportunity presents itself.

IV. INVESTMENT GUIDELINES

Sand Hill Global Advisors, LLC. will utilize an appropriate combination of individual securities in a direct account and specialized third party, commingled fund or mutual fund alternatives to implement the asset allocation. Third-party offerings will be used to enhance the portfolio's diversification in certain asset classes that require specialized expertise or where liquidity may be limited. In each case, the potential for added value, institutional share class fees and cost effectiveness will be a major consideration. Such categories will include passive strategies such as index funds or exchange-traded funds (ETFs), and active strategies such as international, emerging markets or REIT mutual funds.

1. Individual Equity Securities in the Direct Account:

- Each directly owned security position, at the time of purchase, will normally represent about 3% to 5% at cost of the direct investment account equity portion of the large cap equities. In no case will an individual security, at the time of purchase, represent more than 10% of the total cost of the direct account portfolio. Over time, individual securities will not exceed more than 10% of the total market value of the direct account portfolio and specific sectors/industries will not represent any more than 25% of the direct portfolio market value.
- The majority of any direct equity position in the portfolio will meet the Advisor's primary quality guidelines. These will be securities of U.S. companies or multinational companies. Individual securities are judged on the basis of several factors including debt, cash flow, market capitalization, and asset growth. In addition, several non-quantitative characteristics are considered such as management strength, dominance of market position, and product acceptance. It is important that the quality of the portfolio should be viewed as a whole. As part of the allocation process, there may be occasions when smaller companies may be included because of the opportunities they offer without altering the risk profile of the portfolio.

2. Individual Fixed Income Securities in Direct Accounts:

- With the exception of U. S. Government securities and Federal Government Agency securities, no more than 5% at cost of the portfolio may be invested in the securities of a single issuer.

- Corporate issuers will be U. S. or multinational corporations.
- Up to 5% of the total account may be invested in below investment grade securities, commonly referred to as “high yield debt”, but only through adequately diversified investment vehicles.
- From time to time, the Committee may adopt specific working guidelines specifying minimum ownership levels in Treasury securities.

3. Commingled Funds, Mutual Funds and Index Funds:

- The fund selection process will incorporate criteria such as investment style and process, experience of the investment team, organizational stability and performance analysis such as long-term, risk-adjusted returns, manager tenure, relative performance in up and down markets, consistency of management style, and relative expense ratios. Special care will be taken in the selection of the appropriate type of security or class of shares to minimize the expense ratio and transaction costs. When appropriate, negotiations will occur with custodians for the waiver of loads, minimums, and transaction fees.

4. Real Estate:

- The real estate portion may be comprised of private & publicly held real estate investments.

5. Alternative Investments:

- Alternative investments will be broadly defined, but not limited to, as investments in absolute return funds, commodities and gold, real return strategies, venture capital, and other. These categories are to be implemented only through diversified investment vehicles. In the case of absolute return private partnerships, the diversification should be achieved through the use of a “fund of funds”.

6. Cash/Cash Equivalents:

- Cash equivalent positions will be instruments with ratings of A-2, P-2 or higher. U.S. Treasury Bills, Eurodollar Certificates of Deposit, time deposits, money market funds, and repurchase agreements are acceptable instruments.

V. BROKERAGE AND PROXY POLICY

- All transactions effected for SSAA will be “subject to the best price and execution.” Securities and cash will be held in custody at Fidelity Investments.
- Proxy voting has been delegated to SHGA. SHGA has retained Broadridge to vote proxies in the best interest of the shareholders.

VI. CONTROLS AND MONITORING

The SSAA Finance Committee will monitor the total portfolio performance as follows:

1. **Quarterly Reviews** – The SSAA Finance Committee will review the investment performance of SHGA and the individual managers (retained by SHGA) in the portfolio with respect to the risk and return objectives established for SSAA. The review may include topics such as the overall business management, organizational changes and other relevant factors.
2. **Watch list** – In the event that any individual manager is significantly under performing over the long-term, SHGA will maintain a higher level of oversight and may put the firm on a watch list.

Prepared By:

Reviewed and Accepted By:

Sara Craven
Senior Wealth Manager

Jennifer Barber, SSAA
Executive Director

Date: _____

Date: _____

Bruce Hohenhaus, SSAA Board
Vice President, Finance

Date: _____

APPENDIX

1. Benchmark Composition

The Blended Benchmark will be used for the total portfolio review and to review SHGA. Individual asset classes will be reviewed using the indices most appropriate and assigned to each manager or investment style.

The Blended Benchmark is composed as follows:

<u>Asset Class</u>	<u>Index</u>	<u>Weight</u>
Equity		
Domestic Large Capitalization	S&P500 Index	30%
Domestic Small Capitalization	Russell 2000 Index	9%
Foreign	MSCI All-Cap World Index excl. USA	13%
Fixed Income	Barclays Aggregate Index	30%
Real Estate	NAREIT Index	4%
Absolute/Real Return Strategy	Barclays 1-3 Year Aggregate Index	8%
Commodities/Natural Resources	Dow Jones UBS Commodity Index	4%
Cash/Cash Equivalents	U.S. T-Bill 30 day Index	2%

APPENDIX

2. Glossary

Market Indicators	11
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EQUITY MARKET INDICATORS

The market indicators included in this report are regarded as measures of equity or fixed-income performance results. The returns shown reflect both income and capital appreciation.

Russell 2000 Index is composed of the 2000 smallest stocks in the Russell 3000 Index, representing approximately 11% of the U.S. equity market capitalization.

Standard & Poor's 500 Index is designed to measure performance of the broad domestic economy through changes in the aggregate market value of 500 stocks representing all major industries. The index is capitalization-weighted, with each stock weighted by its proportion of the total market value of all 500 issues. Thus, larger companies have a greater effect on the index.

FIXED-INCOME MARKET INDICATORS

Barclays Capital Aggregate Bond Index is a combination of the Mortgage Backed Securities Index and the intermediate and long-term components of the Government/Credit Bond Index.

INTERNATIONAL EQUITY MARKET INDICATORS

Morgan Stanley Capital International (MSCI) All Cap World Index (ACWI)Ex-US Index is composed of approximately 6,000 equity securities representing the stock exchanges of Europe, Australia, New Zealand, the Far East and Emerging Market nations capturing 99% of the global investable market outside of the US. The index captures large, mid and small-cap companies. The index is capitalization-weighted and is expressed in terms of U.S. dollars.

OTHER INDICES

National Association of Real Estate Investment Trusts (NAREIT)Index is the only REIT index to include all REITs currently trading on the New York Stock Exchange, the NASDAQ National Market System and the American Stock Exchange. It is also the first index to include monthly historical statistics from 1972. It is often used as a publicly traded approximation for the illiquid private real estate market.

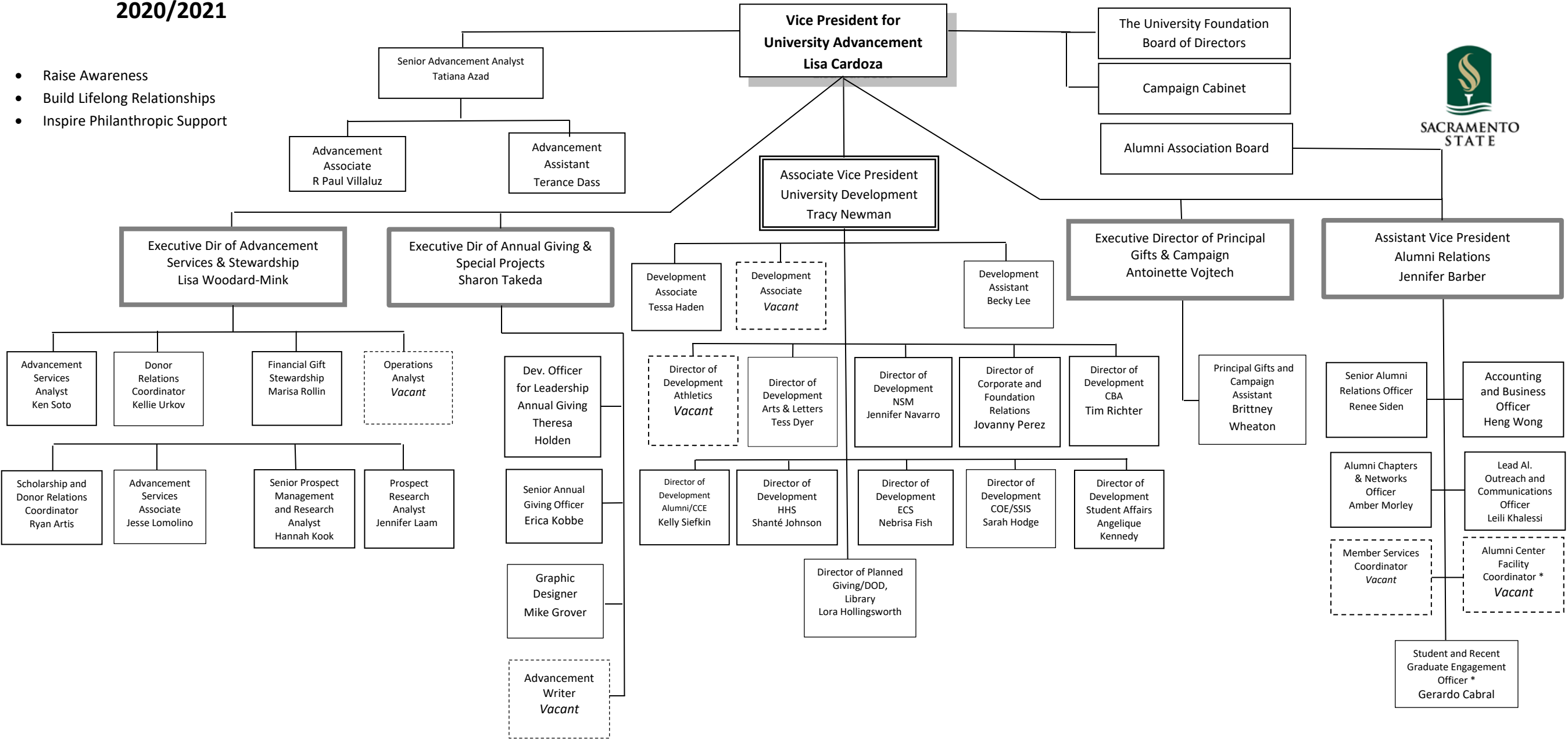
Barclays 1-3 Yr Aggregate Bond Index is a combination of the Mortgage Backed Securities Index and the shorter duration components of the Government/Credit Bond Index.

Dow Jones UBS Commodity Index is designed to be a highly liquid and diversified benchmark for the commodity futures market. Commodities as an asset class have historically demonstrated returns that are negatively correlated with returns of stocks and bonds and that are positively correlated with inflation measures.

U.S. T-Bill 30 day Index is the benchmark used to measure cash. It is also considered to be the “risk-free rate” for purposed of performance measurement.

University Advancement
2020/2021

- Raise Awareness
- Build Lifelong Relationships
- Inspire Philanthropic Support



*Funded from resources other than state general funds
June, 2021



**Sacramento State Alumni Association
Staff Roster 2021-22**

Barber, Jennifer

Assistant Vice President of
Alumni Relations
(w) 278-3634 (f) 278-7464
E-mail: jbarber@csus.edu

Cabral, Gerardo

Student and Recent Graduate
Engagement Officer
(w) 278-4354 (f) 278-7464
E-mail: gerardo.cabral@csus.edu

Khalessi, Leili

Lead Alumni and Communications
Outreach Officer
(w) 278-3862 (f) 278-7464
E-mail: leili.khalessi@csus.edu

McCauley, Travis

Coordinator, Alumni Center
(w) 278-7809 (f) 278-7464
E-mail: alumni@csus.edu

Morley, Amber

Alumni Chapters and Networks Officer
(w) 278-3861 (f) 278-7464
E-mail: alumni.chapters@csus.edu

Siden, Renee

Senior Alumni Relations Officer
(w) 278-4723 (f) 278-7464
E-mail: renee.siden@csus.edu

Siefkin, Kelly

Director of Development,
Alumni Association
(w) 278-5096 (f) 278-7464
E-mail: siefkin@csus.edu

Wong, Heng

Accounting and Business Officer
(w) 278-7718 (f) 278-7464
E-mail: heng.wong@csus.edu

Vacant

Member Services Coordinator
(w) 278-3797 (f) 278-7464
E-mail:

Main Office Contact information:

Sacramento State Alumni Association
6000 J Street, MS 6024
Sacramento, CA 95819

(916) 278-6295 (main phone)
alumni@csus.edu (general email)
SacStateAlumni.com (main website)



**Sacramento State Alumni Association
2021-22 Board of Director Roster**

Anguay, Lora '13 (Business Administration)

Committee(s): Membership Engagement
Preferred Address: 156 Adrienne Court
Roseville, CA 95747
Preferred Phone: (916) 320-7430
Preferred Email: lora.anguay@smud.org
Job Title: Director, Distribution Operations
Employer: SMUD
Advance ID: 407936
Term: 2022 (2019)

Shinnamon Bach, Margot '72 (English)

Committee(s): Scholarship
Preferred Address: 63 Fallwind Cir
Sacramento, CA 95831
Preferred Phone: (916) 427-4647
Preferred Email: mizbunnycakes@gmail.com
Job Title: Retired
Employer:
Advance ID: 3301
Term: 2021 (2017)
Spouse Name: David Bach

Barber, Jennifer

Committee(s): Executive, Nominating, Finance
Preferred Address: CAMPUS ZIP 6024
Leslie & Anita Harper Alumni Center
Preferred Phone: (916) 278-3634
Preferred Email: jbarber@csus.edu
Job Title: Assistant Vice President
Employer: Office of Alumni Relations and the
Sacramento State Alumni Association
Advance ID: 362583
Term: N/A
Spouse Name: Kelly Barber

Bardo, Melissa '16 (Biological Sciences)

Committee(s): Membership Engagement
Preferred Address: 3633 Keswick Way
Sacramento, CA 95826
Preferred Phone: (831) 801-4370
Preferred Email: melissa.bardo122@gmail.com
Job Title: Legislative Analyst
Employer: California Student Aid Commission
Advance ID: 418069
Term: 2023 (2020)

Billeci, Karen '83 (English)

Committee(s): Executive, Chair - Fund Development
Preferred Address: 2672 Torrey Pines Drive
Brentwood, CA 94513
Preferred Phone: (925) 206-9127
Preferred Email: karen.billeci@yahoo.com
Job Title: VP, Regional Marketing Officer
Employer: Zenith Insurance Company
Advance ID: 23701
Term: 2023 (2016)

Borg, Catherine '92 (Communication Studies)

Committee(s): Fund Development
Preferred Address: 1537 41st Street
Sacramento, CA 95819
Preferred Phone: (916) 799-4301
Preferred Email: sacborgs@gmail.com
Job Title: Legislative Advisor, Public Affairs
Employer: Southern California Edison (SCE)
Advance ID: 136740
Term: 2024 (2021)



**Sacramento State Alumni Association
2021-22 Board of Director Roster**

Borland, Walter '74 (Business Administration)

Committee(s): Executive, Chair – Nominating, Chapter Engagement

Preferred Address: 2114 Roaring Camp Drive
Gold River, CA 95670

Preferred Phone: (916) 955-6267

Preferred Email: w.borland@sbcglobal.net

Job Title: Mortgage Loan Officer

Employer: Mason-McDuffie

Advance ID: 36354

Term: 2023 (2017)

Spouse Name: Liz Borland '82 (Nursing)

Brown, Ron '86 (Construction Management)

Committee(s): Executive

Preferred Address: 1465 Entp Blvd Ste 100
West Sacramento, CA 95691

Preferred Phone: (916) 373-9300

Preferred Email: rbrown@brown-construction.com

Job Title: President/CEO

Employer: Brown Construction, Inc.

Advance ID: 42570

Term: 2021 (2015)

Spouse Name: Mary Brown

Cardoza, Lisa

Committee(s): N/A

Preferred Address: CAMPUS ZIP 6026
University Advancement

Preferred Phone: (916) 278-7043

Preferred Email: lisa.cardoza@csus.edu

Job Title: Vice President for University Advancement

Employer: Sacramento State, University Advancement

Advance ID: 434794

Term: Indefinite

Chan, Ryan '16 (Business Administration)

Committee(s): Membership Engagement

Preferred Address: 3100 Zinfandel Drive, Ste. 650
Rancho Cordova, CA 95670

Preferred Phone: (916) 698-8187

Preferred Email: rchan@fivestarbank.com

Job Title: Assistant VP & SBA Production Supervisor

Employer: Five Star Bank

Advance ID: 437805

Term: 2022 (2020)

Delmundo, Rebecca '02 (Business Administration/Mktg.)

Committee(s): Membership Engagement

Preferred Address: 9405 Riversbend Court
Elk Grove, CA 95624

Preferred Phone:

Preferred Email: Rebecca.Delmundo@safecu.org

Job Title: Assistant VP of Community Relations

Employer: SAFE Credit Union

Advance ID: 323965

Term: 2024 (2021)

Dorsey, Patrick '16 (Government), MPPA '19 (Public Policy)

Committee(s): Fund Development

Preferred Address: 32731 Pointe Sutton, Apt. B
Dana Point, CA 92629

Preferred Phone: (909) 499-1972

Preferred Email: Patrick@lucaspúblicaffairs.com

Job Title: Senior Account Executive

Employer: Lucas Public Affairs

Advance ID: 434552

Term: 2023 (2020)



**Sacramento State Alumni Association
2021-22 Board of Director Roster**

Dugan, Robert '89 (Business Administration)

Committee(s): Chapter Engagement

Preferred Address: 1701 Monte Bell Court, Roseville, CA 95661

Preferred Phone: (916) 425-3232

Preferred Email: rdugan@calcima.org

Job Title: President/CEO

Employer: California Construction and Industrial Materials Association (CalCIMA)

Advance ID: 126559

Term: 2021 (2018)

Spouse Name: Beth Dugan

Elizalde, Samantha

Committee(s): N/A

Preferred Address: 1818 X Street, Apt. 112
Sacramento, CA 95818

Preferred Phone: (916) 278-4048

Preferred Email: asipresident@csus.edu

Job Title: President of University Affairs

Employer: Associated Students, Inc.

Advance ID: 474507

Term: 2022 (2022)

Gentry, Dina '06 (Communication Studies)

Committee(s): Chapter Engagement

Preferred Address: 2869 Cascade Trl
Cool, CA 95614

Preferred Phone: (530) 295-2411

Preferred Email: dgentry@edcoe.org

Job Title: Communications Director

Employer: El Dorado County Office of Education (EDCOE)

Advance ID: 351830

Term: 2024 (2021)

Green, Rabbil '06 (Public Relations)

Committee(s): Executive, Chair – Membership
Engagement

Preferred Address: 2670 Highland Drive
West Sacramento, CA 95691

Preferred Phone: (707) 450-6609

Preferred Email: rabbilg@gmail.com

Job Title: Learning and Development Specialist

Employer: SMUD

Advance ID: 355574

Term: 2022 (2019)

Haden, Tessa '15 (Health Science)

Committee(s): Membership

Preferred Address: CAMPUS ZIP 6030
University Advancement

Preferred Phone: (916) 278-6989

Preferred Email: tessahaden@csus.edu

Job Title: Development Associate

Employer: Sacramento State, University Advancement

Advance ID: 426885

Term: 2021 (2019)

Hamilton, Tracy '93 (Mathematics)

Committee(s):

Preferred Address: CAMPUS ZIP 6051
College of NSM

Preferred Phone: (916) 278-6435

Preferred Email: hamilton@csus.edu

Job Title: Professor

Employer: Sacramento State, University Advancement

Advance ID: 140440

Term: 2022 (2021)



**Sacramento State Alumni Association
2021-22 Board of Director Roster**

**Harris-Mathews, Dr. Colette '87
(Communications Studies), MA '01
(Communications Studies)**

Committee(s): Executive

Preferred Address: 7064 Wilshire Circle
Sacramento, CA 95822-4240

Preferred Phone:

Preferred Email: drclhm@gmail.com

Job Title: Consultant

Employer: Self-Employed

Advance ID: 68388

Term: 2023 (2017)

Spouse Name: Roy Mathews '93 (Social Science)

Hastings, Lance '87 (Economics)

Committee(s): Executive, Chair - Finance

Preferred Address: 12860 Rimfire Drive
Wilton, CA 95693

Preferred Phone: (916) 527-4334

Preferred Email: LWH4045@yahoo.com

Job Title: President/CEO

Employer: California Manufacturers & Technology
Association

Advance ID: 69314

Term: 2022 (2019)

Spouse Name: Mary Hastings '87 (Communication
Studies)

Johnson, Chadwick '05 (Criminal Justice)

Committee(s): Membership Engagement

Preferred Address: 4295 Steccato Drive
Rancho Cordova, CA 95742

Preferred Phone: (916) 501-9067

Preferred Email: chad@mindfulinjurylaw.com

Job Title: Founder and Owner

Employer: Mindful Injury Law

Advance ID: 343007

Term: 2024 (2021)

Kistler, Dr. Melissa '85 (Finance)

Committee(s): Executive, Chair – Scholarship, Finance

Preferred Address: 2045 Outrigger Drive
El Dorado Hills, CA 95762

Preferred Phone: (818) 825-9254

Preferred Email: mkistler@edcoe.org

Job Title: Director

Employer: El Dorado County Office of Education

Advance ID: 37189

Term: 2022 (2019)

Lavelle, Devin MPPA '11

Committee(s): Executive, Chair - Chapter Engagement

Preferred Address: 41 Fallwind Circle
Sacramento, CA 95831

Preferred Phone: (916) 995-0927

Preferred Email: devinlavelle@gmail.com

Job Title: Senior Researcher

Employer: California Research Bureau

Advance ID: 393720

Term: 2023 (2017)

Spouse Name: Fiona Lavelle

Nelsen, Dr. Robert S.

Committee(s): N/A

Preferred Address: President's Office
6000 J Street, MS 6022, Sacramento, CA 95819

Preferred Phone: (916) 278-7737

Preferred Email: nelsen@csus.edu

Job Title: President

Employer: Sacramento State

Advance ID: 428454

Term: Indefinite (2015)

Spouse Name: Jody Nelsen



**Sacramento State Alumni Association
2021-22 Board of Director Roster**

Ohaegbu, Nkiruka EMBA '14 (Business Administration)

Committee(s): Finance

Preferred Address: 65 Cedro Circle
Sacramento, CA 95833

Preferred Phone: (248) 797-0544

Preferred Email: ncohaegbu@yahoo.com

Job Title: Public Affairs Representative

Employer: PG&E

Advance ID: 417148

Term: 2024 (2021)

Sabeniano, Mariana '06 (Government)

Committee(s): Scholarship, Finance, Fund, Nominating

Preferred Address: 1550 Golden Cypress Way
Sacramento, CA 95834

Preferred Phone: (530) 400-1182

Preferred Email: mcoronams@gmail.com

Job Title: Chief of Staff

Employer: California State Assembly

Advance ID: 346385

Term: 2023 (2020)

Spouse Name: Ranier Sabeniano

Shestek, Tim '91 (Government)

Committee(s): Membership Engagement

Preferred Address: 1180 Souza Way
Folsom, CA 95630

Preferred Phone: (916) 983-6705

Preferred Email: Tim_Shestek@americanchemistry.com

Job Title: Senior Director of State Affairs

Employer: American Chemistry Council

Advance ID: 131267

Term: 2022 (2020)

Tooker, Nancy (Emeritus Faculty)

Committee(s): Scholarship

Preferred Address: 3399 Barberry Ln
Sacramento, CA 95864

Preferred Phone: (916) 971-3488

Preferred Email: ntooker@me.com

Job Title: Dean Emeritus

Employer: College of Arts & Letters

Advance ID: 87306

Term: 2021 (2009)

Spouse Name: Chris Tooker



**Sacramento State Alumni Association
Leadership Slate
2021-22**

Officers:

President	Colette Harris-Mathews
President-Elect	Wally Borland
VP Administration (Immed. Past President)	Ron Brown
VP Chapters Engagement	Devin Lavelle
VP Finance	Lance Hastings
VP Fund Development	Karen Billeci
VP of Membership Engagement	Rabbil Green
VP Scholarship	Melissa Kistler
VP Nominating (President-Elect)	Wally Borland

Representatives:

CSU Alumni Council Representative	Mariana Sabeniano
University Foundation Board Representative	Ron Brown
GOLD Alumni Council Liaison	Pending



SACRAMENTO STATE ALUMNI ASSOCIATION ALUMNI ASSOCIATION COMMITTEES

1. Chapter Engagement Committee

Chair: Devin Lavelle

Staff: Amber Morley

The Chapter Engagement Committee works to build strong chapters and engage alumni in a meaningful way with the campus community, evaluates existing programs and creates new programs that will help grow and maintain the Alumni Association membership base.

2. Membership Engagement Committee

Chair: Rabbil Green

Staff: Jennifer Barber

The Membership Engagement Committee works to build a strong membership base and the programming to engage members of the Alumni Association. In an effort to continue growing membership, retention and recent graduate (GOLD) engagement will be key focal points. The Committee also is responsible for oversight of membership marketing efforts and to provide prospect leads to the Fund Development Committee.

3. Scholarship Committee

Chair: Melissa Kistler

Staff: Renee Siden

The Scholarship Committee is responsible for overseeing the annual Alumni Scholarship program. The Committee will review plans for seeking applications, establish selection criteria, evaluate applicants and select recipients for the available scholarships. The Committee also is responsible for increasing the funds available for scholarships. ** Open to Association members at large.

4. Finance Committee

Chair: Lance Hastings

Staff: Heng Wong

The Finance Committee is responsible for reviewing the financial affairs of the Association and reporting the financial condition of the Association to the Board on at least a quarterly basis. This includes analyzing each month's financial statements, monitoring budget progress, reviewing the annual proposed budget, monitoring financial policies, and making recommendations to the Board on fiscal policy. ** Open to Association members at large.

5. Nominating Committee

Chair: Wally Borland

Staff: Jennifer Barber

The Nominating Committee is responsible for selecting from the regular active membership, candidates to fill the vacancies that are to occur on the Board of Directors or in any Officer position, due to expiration of the terms of office. The Nominating Committee will submit to the Board a list of nominees for approval by a simple majority vote. The Committee shall consist of at least four (4) members, including the immediate past president, the president-elect and two or more members of the Association appointed by the chairperson with the approval of the president. ** Open to Association members at large.

6. **Fund Development Committee**

Chair: Karen Billeci

Staff: Leili Khalessi

The Fund Development Committee works to ensure funding for Alumni Association activities from non-membership sources such as affinity programs, sponsorships and the Alumni Center rental enterprise. The Committee will evaluate existing programs, new program proposals, identify prospect, make introductions for staff and make recommendations that to maintain stable funding for the Association. Committee members may participate in direct sponsorship solicitation, if desired and appropriate.



2021-22 Committee Assignments

<p><u>Executive</u> Colette Harris-Mathews, President Wally Borland, Pres.-elect/Chair Nominating Jennifer Barber, Asst. Vice President/Staff Ron Brown, VP Administration Devin Lavelle, VP Chapter Engagement Lance Hastings, VP Finance Karen Billeci, VP Fund Development Rabbil Green, VP Membership Engagement Melissa Kistler, VP Scholarship</p>	<p><u>Membership Engagement</u> Rabbil Green, VP and Chair Jennifer Barber, Staff Liaison Lora Anguay Melissa Bardo Rebecca Delmundo Tess Dyer* Chadwick Johnson Jeff Owen Tim Shestek Tessa Haden</p>
<p><u>Nominating</u> Wally Borland, Chair Jennifer Barber, Staff Liaison Bruce Hohenhaus* Sharon Krause* Mike Rizzo* Rhonda Staley-Brooks* Mariana Sabeniano</p>	<p><u>Finance</u> Lance Hastings, VP and Chair Heng Wong, Staff Liaison Ryan Chan Larry Gilmore* Melissa Kistler Ivan Lampty* Nkiruka Ohaegbu Mariana Sabeniano</p>
<p><u>Scholarship</u> Melissa Kistler, VP and Chair Renee Siden, Staff Liaison John Abbott* Margot Bach Jody Bussey* (reader) Michelle Cordova* De-Laine Cyrenne Khalil Ferguson* Yarcenia Garcia* Pam Herman* Chris Higdon* Sharon Krause* Brenda Narayan* Mariana Sabeniano Renee Parker* Monica Pope* Mike Robson* Bryan Glover* Nancy Tooker Nadir Hajiyani*</p>	<p><u>Chapter Engagement</u> Devin Lavelle, VP and Chair Amber Morley, Staff Liaison Wally Borland Joan Carnago* Robert Dugan Dina Gentry Thomas Gilbert* Alyson Matsuo Tim Sbranti* Sam Starks* Merrill Roseberry* David Murillo*</p>
<p>Ex-officio on all committees: <i>Colette Harris-Mathews, ex-officio</i> <i>Wally Borland, ex-officio</i> <i>Jennifer Barber, ex-officio</i></p> <p>NOTE: Per SSAA By-laws, committee members may be added at any point by appointment of the President. * SSAA Member-at-large</p>	<p><u>Fund Development</u> Karen Billeci, VP and Chair Leili Khalessi, Staff Liaison Catherine Borg Jody Bussey* Matt Cologna* Patrick Dorsey Mariana Sabeniano Kelly Siefkin*</p>



2021-2022 Alumni Association Important Dates (Updated 8/27/2021)

SSAA Board Meetings:

- Monday, August 30, 5:30-7:30 p.m.
- **RETREAT:** Friday, October 1, 8:30 a.m. – 1:30 p.m.
- Monday, December 6, 5:30-8:00 p.m.
- Monday, February 7, 5:30 – 8:00 p.m.
- Monday, March 21, 5:30 - 8:00 p.m.
- Monday, May 9, 5:30 -8:00 p.m.

Events:

More to come as we navigate safe gatherings.

September:

- Wednesday, Sept. 8—**Career Buzz @ 5:30 p.m.** – virtual event
- Saturday, Sept. 11—Football vs. N. Iowa – in-person event
- Thursday, Sept. 16—**NSM Alumni Network Game Night @ 6:30 p.m.**– virtual event
- Thursday, Sept. 23—**ECS Chapter Career Conversation @ 5:00 p.m.** – virtual event

October:

- Wednesday, Oct. 6—**Career Buzz @ 5:30 p.m.** – virtual event
- Saturday, Oct. 9—Football vs. S. Utah – in-person event
- Sunday, Oct. 10—**Latinx Alumni Chapter Hiking @ 8:00 a.m.** – in-person event
- Thursday, Oct. 14—**Distinguished Alumni Awards (DAA) @ 5:30 p.m.** – hybrid event
- Tuesday, Oct. 19—**Comms Chapter Trivia Night @ 6:00 p.m.** – virtual event
- Wednesday, Oct. 20—**VAPA Chapter 'Rocky Horror Show' event** – format TBD
- Thursday, Oct. 21—**The Anatomy of Football (NSM Network) @6:30 p.m.** – virtual event
- Thursday, Oct. 21—**HPPA What's Possible @ 12:00 p.m. or 6:00 p.m.** – format TBD
- Friday, Oct. 22—Dance Marathon (STUDENTS ONLY) – in-person
- Saturday, Oct. 23—**Homecoming Festival @ 3:00 p.m.** Lot 8 – in-person event
- Sunday, Oct. 24—**Placer Chapter TopGolf (Roseville)** – in-person event

NOTE: Please check our Events page on the SSAA website often for future event details/updates and whether events will be virtual or in-person.

<https://www.csus.edu/experience/alumni-association/events-calendar.html>

SACRAMENTO STATE ALUMNI ASSOCIATION

Approved Budget

July 2021 through June 2022

	Approved		Approved		Approved		% change	Notes:
	Jul 19 - Jun 20	Jul 20 - Jun 21	Jul 21 - Jun 22	Jul 21 - Jun 22	Jul 21 - Jun 22			
Ordinary Income/Expense								
Income								
2230 · MEMBERSHIP CONTRIBUTIONS								
2231 · ALUMNI PROGRAMMING CONTRIBUTIONS	\$	112,600	\$	50,000	\$	60,000	20%	Based on FY 20-21 giving and expected solicitations
2233 · INVESTMENT FUND CONTRIBUTION	\$	36,000	\$	-	\$	-	0%	Topic to address before FY 22-23
Total 2230 · MEMBERSHIP INCOME	\$	148,600	\$	50,000	\$	60,000	20%	
2238 · PROGRAM RECEIPTS	\$	27,500	\$	10,000	\$	20,000	100%	Grad Packs and program/event revenues
2243 · NON DUES REVENUE	\$	110,000	\$	110,000	\$	110,000	0%	Liberty Mutual Affinity Partnership revenue
2244 · GIFTS/GRANTS	\$	1,200	\$	1,200	\$	-	-100%	Unknown if Board dinner hosts will return
2248 · SPONSORSHIP	\$	33,000	\$	10,000	\$	25,000	150%	\$25K cash; plus any in-kind
2250 · DIVIDEND EARNINGS	\$	18,000	\$	20,000	\$	27,000	35%	2% of market value as of 4/30/21
2255 · INTEREST INCOME (checking)	\$	1,200	\$	250	\$	250	0%	
22XX · REALIZED GAIN/LOSS INVESTMENT	\$	0	\$	2,500	\$	100	-96%	Actual will be based on market performance
2268 · UNREALIZED GAIN/LOSS INVESTMENT	\$	19,100	\$	2,000	\$	100	-95%	Actual will be based on market performance
Total Income	\$	358,600	\$	205,950	\$	242,450	18%	
Gross Profit	\$	358,600	\$	205,950	\$	242,450	18%	
Expense								
4100 · GENERAL OPERATIONS								
4105 · Credit Card/Bank Fees	\$	8,000	\$	6,000	\$	5,000	-17%	Less due to no membership dues
4107 · Insurance	\$	4,200	\$	3,750	\$	3,900	4%	Based on 2020-21 rates
4112 · Supplies	\$	5,500	\$	5,500	\$	2,500	-55%	Most moved to University budget
4114 · Telephone	\$	2,500	\$	-	\$	-	0%	Moved to University budget
4125 · Salaries	\$	80,000	\$	75,000	\$	70,000	-7%	FWS students moved to University budget
4126 · Benefits	\$	20,000	\$	20,000	\$	19,000	-5%	Based on 2020-21 actuals
4128 · Equipment Expense	\$	3,000	\$	1,000	\$	1,000	0%	Most moved to University budget
4130 · Repairs & Maint.	\$	250	\$	250	\$	250	0%	
4131 · Miscellaneous Ops	\$	400	\$	400	\$	400	0%	
4132 · Committee Meetings	\$	50	\$	500	\$	50	-90%	All will remain virtual for 2021-22
Total 4100 · GENERAL OPERATIONS	\$	123,900	\$	112,400	\$	102,100	-9%	
4160 · PROGRAM EXPENSES								
4162 · Facilities Fee	\$	1,500	\$	1,500	\$	1,500	0%	Expecting return to some in-person programs
4163 · Floral/Decorations	\$	4,400	\$	2,000	\$	2,500	25%	Expecting return to some in-person programs
4164 · Food Service	\$	35,000	\$	20,000	\$	22,500	13%	Expecting return to some in-person programs
4165 · Professional Services	\$	7,500	\$	7,500	\$	10,000	33%	Increased with video/hybrid needs
4166 · Signage	\$	4,100	\$	3,000	\$	3,000	0%	
4167 · Reimbursable Purchases	\$	1,800	\$	1,800	\$	1,800	0%	Varies based on the years events
4168 · Chapter Programs	\$	28,000	\$	13,550	\$	-	-100%	Covering from 'Chapter Undesignated' fund for FY22
Total 4160 · PROGRAM EXPENSES	\$	82,300	\$	49,350	\$	41,300	-16%	
4170 · MARKETING PROMOTIONS								
4171 · Member/Grad Fest Premium Items	\$	18,500	\$	18,500	\$	18,500	0%	
4172 · Merchandise/Promo/Giveaways	\$	10,000	\$	5,000	\$	7,500	50%	Assuming return to some in-person programs.
Total 4170 · MARKETING PROMOTIONS	\$	28,500	\$	23,500	\$	26,000	11%	
4180 · PROFESSIONAL CONF./AFFILIATIONS								
4183 · Professional Development	\$	1,500	\$	1,500	\$	1,500	0%	
Total 4180 · PROFESSIONAL CONF./AFFILIATIONS	\$	1,500	\$	1,500	\$	1,500	0%	
4190 · EXTERNAL COMMUNICATIONS								
4191 · Mail House Services	\$	4,000	\$	2,000	\$	2,000	0%	Reduced with reduction in membership campaigns
4192 · Printing	\$	25,000	\$	17,000	\$	15,000	-12%	
4193 · Postage	\$	22,500	\$	16,500	\$	15,000	-9%	
4194 · Interactive Website	\$	45,000	\$	10,000	\$	45,000	350%	iModules was covered by UFSS for FY 20-21
4198 · Advertising	\$	1,000	\$	500	\$	500	0%	
4199 · Photocopier	\$	1,750	\$	-	\$	-	0%	Moved to University budget
Total 4190 · EXTERNAL COMMUNICATIONS	\$	99,250	\$	46,000	\$	77,500	68%	
4200 · TRAVEL								
4201 · Travel - Meetings & Events	\$	7,900	\$	4,000	\$	5,000	25%	Expecting return to some in-person programs
4203 · Travel - Professional Develop	\$	2,000	\$	-	\$	-	0%	Moved to University budget
4204 · Travel - Business Meals	\$	1,400	\$	1,400	\$	1,400	0%	
Total 4200 · TRAVEL	\$	11,300	\$	5,400	\$	6,400	19%	
4230 · HONORS/STEWARDSHIP								
4231 · Awards	\$	1,200	\$	1,200	\$	1,200	0%	
4232 · Stewardship	\$	1,500	\$	1,500	\$	1,500	0%	
4233 · Sponsorships/Grants	\$	1,500	\$	500	\$	1,500	200%	
Total 4230 · HONORS/STEWARDSHIP	\$	4,200	\$	3,200	\$	4,200	31%	
4250 · OTHER EXPENSES								
4252 · Investment Fee	\$	5,000	\$	5,459	\$	5,000	-8%	Varies based on market
4254 · Tax/Audit Fees	\$	1,950	\$	1,950	\$	1,950	0%	

	Approved	Approved	Approved		
	Jul 19 - Jun 20	Jul 20 - Jun 21	Jul 21 - Jun 22	% change	Notes:
4255 · Miscellaneous (discretionary)	\$ 500	\$ 500	\$ 500	0%	
Total 4250 · OTHER EXPENSES	\$ 7,450	\$ 7,909	\$ 7,450	-6%	
Total Expense	\$ 358,400	\$ 249,259	\$ 266,450		
Net Other Income	\$ 200	\$ (43,309)	\$ (24,000)	-45%	
Net Income	\$ 200	\$ (43,309)	\$ (24,000)	-45%	

**Sacramento State Alumni Association
Harper Alumni Center
FY 2021-22 Budget**

	Approved		Approved		Approved		
	Jul 19 - Jun 20	Jul 20 - Jun 21	Jul 21 - Jun 22	% change	Notes:		
Ordinary Income/Expense					Assumes rental operations will happen at least 6 months.		
Income							
Catering Income	\$ 5,800	\$ 1,000	\$ 1,000	0%	Will let existing Preferred caterers continue with no add'l fee.		
Dance Floor/Equipment Rental	\$ 20,000	\$ 10,000	\$ 10,000	0%	Estimating half of normal usage		
Interest/Dividend Income	\$ 250	\$ 3,000	\$ 3,000	0%	Based on prior year.		
Miscellaneous Income	\$ 150	\$ 150	\$ 150	0%			
Rental Income	\$ 149,000	\$ 96,713	\$ 96,713	0%	Rent and half of normal rentals		
Security Deposit Forfeited	\$ 500	\$ 500	\$ 500	0%			
Realized Gains/Losses	\$ 0	\$ 900	\$ 100	-89%			
Unrealized Gains/Losses	\$ 1,500	\$ 200	\$ 100	-50%			
Total Income	\$ 177,200	\$ 112,463	\$ 111,563	-37%			
Gross Profit	\$ 177,200	\$ 112,463	\$ 111,563				
Expense							
Advertising/Promo Materials	\$ 4,000	\$ 1,500	\$ 1,500	0%	Unable to spend until we can book		
Bank (Credit Card) Fees	\$ 2,500	\$ 1,500	\$ 1,500	0%	Reduced due to fewer bookings		
Contract Services	\$ 11,000	\$ 10,000	\$ 10,000	0%	Misc. such as pest, garbage, etc.		
Decorations	\$ 250	\$ -	\$ -	0%			
Equipment	\$ 1,000	\$ 250	\$ 250	0%			
Equipment/Linen Rental-Client	\$ 2,000	\$ 500	\$ 500	0%	Expenses passed on to clients		
Insurance	\$ 2,450	\$ 2,300	\$ 2,300	0%			
Investment Fee	\$ 500	\$ 250	\$ 250	0%	Based on prior year.		
Janitorial	\$ 15,000	\$ 12,000	\$ 10,000	-17%	Reduced services while closed		
Landscaping	\$ 9,600	\$ 9,600	\$ 9,600	0%			
Miscellaneous	\$ 500	\$ 500	\$ 500	0%			
Postage	\$ 400	\$ 200	\$ 200	0%			
Repair & Maintenance	\$ 22,000	\$ 22,000	\$ 24,000	9%			
Salaries	\$ 72,400	\$ 52,400	\$ 65,000	24%	1 FTE and 3 students; reduced*		
Benefits	\$ 18,000	\$ 6,000	\$ 12,000	100%	1 FTE and 3-5 students		
Supplies	\$ 1,500	\$ 1,500	\$ 1,500	0%			
Tax Preparation	\$ 1,800	\$ 1,925	\$ 1,925	0%	Tracking to actual cost		

**Sacramento State Alumni Association
Harper Alumni Center
FY 2021-22 Budget**

Travel	\$	200	\$	200	\$	200	0%	<i>mileage reimbursement</i>
Utilities	\$	22,000	\$	16,000	\$	12,000	-25%	<i>gas/electricity/sewage; reduced usage</i>
Total Expense	\$	187,100	\$	138,625	\$	153,225		
Income before Depreciation	\$	(9,900)	\$	(26,162)	\$	(41,662)		
Depreciation	\$	80,000	\$	89,481	\$	89,481	0%	
Net Ordinary Income	\$	(89,900)	\$	(115,643)	\$	(131,143)		

NOTE: We will not hit projected revenues in FY 2020-21 due to COVID forced shuttering of our facility. It is unclear when we will be able to engage in event rentals again, so I am estimating zero rental income from July 1 - December 31, 2021.



Sacramento State Alumni Association
Membership Structure Proposal to
Board of Directors



Proposal to the SSAA Board of Directors | *October 14, 2019*

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Summary

The mission of the Sacramento State Alumni Association (SSAA) is to connect, engage and celebrate alumni, students and friends of Sacramento State while building lifelong relationships that support the future of our University. Our desire to reshape our SSAA membership program is based on the following objectives to 1) grow our base of meaningfully engaged alumni, 2) eliminate the perceived barriers to involvement that our paying membership model presents, 3) increase our population of alumni donors, and to 4) enhance the donor pipeline for Sacramento State.

Historically, SSAA has operated under a dues-paying membership model (alumni pay dues to become members). While the number of Sacramento State alumni paying membership dues has generally increased over the last decade, it has not kept pace with the growth of our alumni population. This indicates a greater opportunity to engage all alumni with SSAA and the University.

To that end, SSAA is reinventing its membership model. Initially approved by the SSAA Board in March 2019 to:

- 1) add an all-inclusive “free” membership level that engages all alumni as members;
- 2) simplify and reduce the number of membership levels/options;
- 3) shift from a dues paying membership model to a gift model;
- 4) offer meaningful engagement opportunities, benefits, and recognition at all levels; and
- 5) leverage University Advancement division resources to expand our reach.

With additional leadership transition and increased focus on building a culture of philanthropy, we would like to propose another option for consideration – elimination of any type of membership giving levels, implementation of an inclusive or “free” membership for all alumni and friends of Sacramento State, and encouragement of philanthropic giving.

Background

Mission

The Sacramento State Alumni Association connects, engages and celebrates alumni, students and friends of Sacramento State **while building lifelong relationships that support the future of our University.**

This mission statement came out of a year-long strategic planning exercise undertaken by the SSAA Board of Directors in 2014-15. This was the tail end of a growth period for membership and came at a time when there were not resources within the University to invest deeper in alumni engagement. As a result, expanding engagement was tied directly to increasing the number of dues-paying alumni. Fast forward to 2019, Sacramento State is in the middle of a Comprehensive Campaign and there is an appetite to increase the focus on engagement and a willingness to make an investment to do so.

SSAA 2015-2020 Strategic Plan Goals:

1. Meaningfully engage alumni and students
2. Engage Graduates of the Last Decade (GOLD)
3. Strengthen membership
4. Strengthen communications and visibility
5. Maximize long-term financial stability

Values

- Connected—to be connected to the key stakeholders of Sacramento State and each other while helping to facilitate connections for alumni and students through a diverse array of programs.

- Leadership—to showcase the vision and goals of the Association and the University while taking a leadership role within the community.
- Community—to be visible and engaged within our campus, local, regional, statewide and global community.
- Pride—to embrace traditions and promote Hornet pride.
- Relationships—to play an integral role in building lifelong relationships with a diverse population of Sacramento State alumni and friends. To truly be their ‘Hornet Connection for Life.’

Structure

Alumni associations in public higher education typically fit in one of three categories in terms of their organization and relationship to the university: dependent, interdependent, or independent. SSAA is structured as an interdependent entity, serving as both the Office of Alumni Relations, department of Sacramento State, and SSAA as a 501(c)3 non-profit corporation. Through our Memorandum of agreement (MOA) with the University, we function as one entity to engage Sac State alumni based on shared funding responsibility with the University.

SSAA History

In 1949, Sacramento State College President Guy A. West suggested that it might be time to consider preparing some kind of alumni organization. A group of graduates drafted bylaws and adopted them on July 20, 1950, then incorporated as a 501(c)3 non-profit corporation, the Sacramento State Alumni Association (SSAA), with a membership dues structure. The primary role of this new organization was to enhance the excellence of the College and provide a bridge between the College and the community it serves. The SSAA now serves more than 250,000 alumni.

Historically, SSAA has operated upon a dues paying membership model (alumni pay dues to become members). While the number of alumni paying membership dues has generally increased over the last decade, it has not kept pace with the growth of our alumni population which is growing on average 3%+ per year. Over the last five years, the total number of alumni members has averaged just 2% growth. Today we stand at just 2.9% of our alumni population as dues paying members compared to 3.3% in 2014-15. This suggests a greater opportunity for engaging all alumni with SSAA (**see**

Appendix: Table 1: Annual Membership Totals).

Case for Alumni Engagement

Some things are a part of you forever. Those who embark on an educational journey with Sacramento State find a place and a Hornet family they can call their own – not just for their time on campus, but for the rest of their lives. Our future growth depends on the success of our past, and we need engaged alumni to continue our legacy.

Alumni are at the heart of Sacramento State, serving as a critical bond between the University’s academic core and the world in which we prepare our students to become leaders. Alumni are a key part of the University’s brand experience, serving as ambassadors within their communities of influence, as advocates, and as mentors to current students. This impacts the way people think, feel, and act towards our University and the communities we serve. Investing in this relationship with our alumni is more important than ever. By refocusing our membership structure, we are renewing our commitment to all of our graduates—developing new ways to support them in their careers and well-being throughout their lifetime—and in return we will see our alumni sharing our story, philanthropically supporting our students and programs, and utilizing their talents and experience to engage with current students.

Alumni engagement at Sacramento State is anchored in the following interrelated programmatic areas:

Supporting Student Success

The relationship with our alumni begins when a student starts their educational journey at Sacramento State. Through the Student Alumni Association (SAA) we will provide career exploration opportunities, mentoring, speaker panels, scholarships and more. Today's students are our future alumni and it is crucial that we use the time our students are on campus to introduce them to what it means to be an engaged alum. Research indicates that students who are involved during their time on campus will stay involved as alumni.

Recent Graduate Engagement

To shorten the time horizon to alumni engagement and to capitalize on the investment in student programming, it's imperative that we also invest in our recent graduates. This allows us to develop programming and volunteer opportunities aimed at their unique needs, leverage their personal and professional life experiences, and appropriately target messages.

Chapters and Affinity Groups

Building alumni connections and programs that are based on the activities, affiliations, and interests of our graduates, will attract and maintain involvement. We are placing increased attention on strengthening these groups and tying them together to the mission of the Alumni Association and the University, which will pay dividends in increased alumni engagement.

Volunteer Engagement

Volunteers extend the reach of the Alumni Association and the University. They carry institutional messages, serve as brand ambassadors, and increase Hornet pride. We will improve and enhance the experience of alumni volunteers, develop strategies and processes for stewardship, provide training, and recognize the efforts of our alumni volunteers.

Alumni Programming

With nearly 60% of our alumni staying in the Sacramento region, we will focus on quality programming opportunities to keep our local alumni connected. We will also look to provide opportunities to regional concentrations of alumni (SF Bay Area, Southern California, Washington DC, New York, etc.). We will leverage our faculty and outstanding alumni to deliver some of the programming content. We will evaluate current programming and structure future programming to best suit the needs and interests of an increasingly broad and diverse base of alumni.

Next phase of alumni engagement

Continuing to evolve our alumni programming is critical. Since 1950, the Sacramento State Alumni Association has served and supported the University, our more than 250,000 alumni, students, loyal friends, and the Sacramento community that serves as our home. We care deeply about all of our alumni, and recognize that the University's future and its ability to enrich lives and improve communities depends upon the development of meaningful, lifelong relationships. Alumni support is essential to achieving our shared aspirations that come as a result of having engaged alumni. The Alumni Association recognizes the importance of these relationships, and we are committed to providing meaningful opportunities for alumni to connect.

Proposal

Create an inclusive membership

Historically, SSAA has operated upon a dues paying membership model (alumni pay dues to become members). The new proposed membership model will create an inclusive “free” membership that alumni and friends can activate at any time. This “free” membership is designed to engage all alumni as members of the Sacramento State Alumni Association.

Alumni Association membership has proven to be one of the key methods of identifying those alumni interested in a continued relationship with the University. Now, we will look to those who activate their “free” membership as providing that same indication they are interested in being engaged. Through communications and stewardship, they are also more likely to be more to become donors to Sacramento State.

Interest in the Association is a strong signal of affinity for Sacramento State and a desire to be involved in the life of the institution. While there are many reasons people choose to get involved—networking, philanthropy, benefits—expanding our membership to all alumni, regardless of financial capacity, allows them to affirm their interest in Sacramento State as they activate their membership.

On an administrative level, we will have more complete contact and business information for alumni who ‘activate’ versus those that do not. This information improves data integrity and is a large source of phone numbers and business information for alumni. Availability of this data significantly impacts campus programs, such as Annual Giving and Development.

Eliminate all paid membership recognition levels

In welcoming all alumni to join the Alumni Association with no expectation of payment, the previously approved model created a point of confusion to then have giving levels with different types of benefits. Should the SSAA Board of Directors approve the implementation of an inclusive “free” membership structure, all other paid membership types will be eliminated, including life membership.

The potential point of concern is with our 3,500 existing life members. We will develop a communications strategy specific to this group of committed alumni and consider memorializing their lifetime status in some honorific way. The goal will be to reassure them that we still value their commitment, that we will provide some level of programming specific to them, and that their investment continues to make a difference every day.

Financial Implications

With any programming change that has direct revenue implications, there are going to be concerns. Making the shift to eliminate all membership contributions will require us to become more reliant on other revenue streams. It is unknown how long it will take for these alternate sources to sustain programmatic activity at the previous level. The previous revenues generated by membership dues provided approximately \$130,000 in general alumni programming funds; \$22,000 in chapter programming funds; and \$25,000 to invest in future programming.

To address the unknown, we have been working with Vice President of University Advancement, Lisa Cardoza, and the Executive Director of Annual Giving, Sharon Takeda.

In addition to removing any perceived barriers to participation, the primary impact of eliminating membership dues is that we will create an additional pipeline of Sacramento State donors. Knowing this, there is broad support from the University and President Nelsen to augment our programming needs in the years it takes to move from simply replacing funds to generating enough to be enhancing programs. Our working estimate is four (4) years but we are also aware that when our colleagues at the Fresno State Alumni Association undertook this same transition, it took them six (6) years to reach that tipping point from replacement to enhancement funding.

Initial funding proposals:

- Gap funds for 2019-20:
 - This is likely going to be the year with the largest gap in funding due timing of this transition. If approved, we will not deploy our fall membership solicitation to avoid the negative PR of then announcing membership is “free” in January.
 - We would like to request funds to execute a one-time survey of a segment of lapsed/former members, in Sacramento and the Bay Area, inviting them to share how they want to be engaged. This would help inform our future engagement strategy.
 - We would like to request funds for a one-time mailing to all lifetime members assuring them that our change in structure does not negate or devalue their investment as a life member.
 - We would like to request funds for a postcard mailing in January to a large segment of alumni without email addresses, letting them know about the change and inviting them to ‘activate’ their “free” membership.
- Confirmed sources of future revenue:
 - Solicitations executed by the Annual Giving Office specifically to support alumni programming; funds would deposit into our Foundation Account and be transferred monthly to SSAA to fund operations.
 - Major gift solicitations executed by our Director of Development to support alumni programming through individual asks and by growing corporate sponsorship support.
 - Implementation of an Alumni Circle donor recognition level with Annual Giving to help cultivate, steward and grow our donor base.

- Funding sources being explored:
 - Planned Giving – asking donors to commit funds in their estate plan to support alumni programming (to be realized in the future);
 - Committed portion of the campus gift fee to support alumni programming;
 - Identification of a major donor that is willing to underwrite our first 4-6 years of this new structure (\$250,000-600,000);
 - Carry-forward from University Advancement’s state budget from last year (one-time funding).

Implementation

Timeline – Launch 1/1/20

Having been an organization based on dues paying membership since our founding in 1950, there are many layers to implementing dramatic change. Some of these have already been taken including bylaw revisions and refocusing our alumni chapter model. As our current MOA with the University and President Nelsen reaches its renewal date (6/30/20), we will make sure to incorporate appropriate changes in that governing document as well.

Initial Communications

Over the next two months, staff will be focused on developing action plans in a number of areas and drafting communications with specific audiences and their needs in mind. High level, it will look something like this:

- October: Planning and developing FAQs, talking points and working to incorporate philanthropic messaging.
- November: Planning continues; November *Sac State Connections* e-newsletter deploys highlighting alumni programming.
- December: Plans completed, stage set for implementation in January; December *Sac State Connections* e-newsletter deploys highlighting alumni programming; letter goes out to SSAA life members notifying them of the change, noting the continuation of special life member programming, and emphasizing the importance of their investment.
- January – LAUNCH:
 - Week 1: follow-up email to life members; SSAA website updated to reflect changes
 - Week 2: ‘Happy New Year’ email to all alumni announcing our “resolution” to be more inclusive and inviting all alumni to activate their ‘free’ membership
 - Week 3:
 - President’s Town Hall Address (1/16/20) – new all-inclusive model announced to the campus;
 - email to all alumni from President Nelsen welcoming them to the Alumni Association and encouraging them to ‘activate’ their free membership;
 - Postcard to select alumni without email; lapsed and current SSAA membership; sharing news and referring online;
 - Story and social media posts in collaboration with UComm.
 - Week 4: Email from SSAA President, Amanda Merz, sharing upcoming events and programs; encouraging all to get involved.
- February to June – continue messaging, programming and inviting alumni to activate.

Solicitation Plans

While the heart of this new direction is the elimination of the Alumni Association collecting membership contributions, the Annual Giving Office will be fundraising to support alumni programming. To accomplish this, we will work in collaboration with the Annual Giving Office to create and execute a consistent annual appeal cycle. For the period of Jan. 1-June 30, 2020, we are planning:

- February 2020 solicitation to include:
 - Direct mail appeal to Alumni Association members and those that are 1-3 years lapsed; exclude Grad Pack only members;
 - Email appeal #1 – same audience as the direct mail appeal PLUS the Grad Pack Members and 3-6 years lapsed members;
 - Email appeal #2 – same audience
- Give Sac State Day – April 24
 - Opportunity to make the case for alumni programming support via email and social media.

For future years, we expect solicitations to consist of a mix of direct mail, email, phone, web and social media with 3-4 large appeals per year. For example:

- August/September – fall alumni programming solicitation
- October – Alumni Scholarship Fund appeal (raises \$13-20K/year)
- February – spring alumni programming solicitation
- April – Give Sac State Day appeals

Role of the SSAA Board of Directors

This membership shift represents a leap of faith for both the Sacramento State Alumni Association and the University, a leap towards increased engagement and fundraising as well as increased support. In the early years of this new model, we will be focused on replacing the programmatic funds but as the success of Annual Giving and our Director of Development grows, the opportunity will shift to enhancing and growing our programs. We expect this shift could take up to four years but we have the commitment of President Nelsen to ensure we will have the gap funding needed to continue engaging alumni. This is where our volunteer leadership has to in turn show their support and faith in this new direction. This means several things, it is expected that:

- 100% of the Board will make an annual donation to support alumni programming.
- Board Directors will encourage fellow alumni that are friends and colleagues to activate their “free” membership.
- Board Directors will invite their friends and colleagues to attend events and become engaged alumni.
- Board Directors will help identify gift prospects and corporate sponsors to aid our Director of Development in raising more funds for alumni programming.
- Board Directors will be ambassadors for and participants in our Give Sac State Day (April).

Evaluation

SSAA's evaluation process will involve gathering data about "free" membership activation and giving rates to alumni programming, then analyzing it to determine whether the new structure is achieving the anticipated results. This will allow for message and solicitation modification along the way. This will be done in conjunction with Annual Giving and shared with the SSAA Board of Directors.

Next Steps

- Seek approval from the SSAA Board of Directors for revised Membership Structure – 10/14/19
- Finalize revenue projections and gap funding with VP Cardoza for Finance Committee and Board review – 12/9/19
- Work with Annual Giving to develop spring 2020 solicitations and the 'Alumni Circle.'
- Prepare communications (language for website, phone scripts, forms, and letters) for launch January 2020
- Submit paperwork for a University Foundation account; establish regular transfer cycle to SSAA – prior to January 2020
- Work with SSAA Director of Development to grow sponsorship and fill her portfolio with alumni programming major gift prospects.
- Update the MOA with the University and President Nelsen for signature at a SSAA Board meeting prior to June 30, 2020
- Evaluate first six months and finalize plans for FY 2020-21.

Appendix I

Table 1: Annual Membership Totals

Sacramento State Alumni Association Membership Totals (as of June 30 each year)

Fiscal Year End	Annual Members	% of total	% change	Life Members	% of total	% change	Total Members	% change
2002-2003	2440	53%	--	2161	47%	--	4601	--
2003-2004	2363	52%	-3.2%	2169	48%	0.4%	4532	-1.5%
2004-2005	2278	50%	-3.6%	2254	50%	3.9%	4532	0.0%
2005-2006	2108	48%	-7.5%	2256	52%	0.1%	4364	-3.7%
2006-2007	2125	48%	0.8%	2268	52%	0.5%	4393	0.7%
2007-2008	2367	51%	11.4%	2309	49%	1.8%	4676	6.4%
2008-2009	2239	49%	-5.4%	2335	51%	1.1%	4574	-2.2%
2009-2010	2682	52%	19.8%	2438	48%	4.4%	5120	11.9%
2010-2011	3033	54%	13.1%	2571	46%	5.5%	5604	9.5%
2011-2012	3408	56%	12.4%	2686	44%	4.5%	6094	8.7%
2012-2013	4209	60%	23.5%	2772	40%	3.2%	6981	14.6%
2013-2014	4189	59%	-0.5%	2862	41%	3.2%	7051	1.0%
2014-2015	4282	59%	2.2%	3001	41%	4.9%	7283	3.3%
2015-2016	3998	56%	-6.6%	3115	44%	3.8%	7113	-2.3%
2016-2017	3747	54%	-6.3%	3227	46%	3.6%	6974	-2.0%
2017-2018	3862	53%	3.1%	3401	47%	5.4%	7263	4.1%

Table 2: Historical Financial Data 2007–2018

	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Membership Dues	\$ 95,825.00	\$ 75,465.10	\$ 99,660.28	\$ 116,749.51	\$ 129,242.50	\$ 129,520.00	\$ 134,703.33	\$ 144,407.50	\$ 136,098.85	\$ 121,920.11	\$ 121,241.00
Life (to program fund)	\$ 10,125.00	\$ 7,850.00	\$ 20,180.00	\$ 29,484.50	\$ 27,712.50	\$ 28,357.50	\$ 25,712.50	\$ 30,232.50	\$ 25,020.88	\$ 25,425.25	\$ 34,056.00
Chapters	\$ 1,060.00	\$ 2,494.80	\$ 3,000.00	\$ 23,305.00	\$ 24,515.00	\$ 26,820.00	\$ 22,855.00	\$ 27,065.00	\$ 24,095.00	\$ 24,175.00	\$ 20,900.00
	\$ 107,010.00	\$ 85,809.90	\$ 122,840.28	\$ 169,539.01	\$ 181,470.00	\$ 184,697.50	\$ 183,270.83	\$ 201,705.00	\$ 185,214.73	\$ 171,520.36	\$ 176,197.00
Program Investment Acc	\$ 64,678.84	\$ 112,030.34	\$ 131,654.18	\$ 162,008.76	\$ 364,029.67	\$ 467,651.59	\$ 582,786.00	\$ 712,667.76	\$ 837,908.27	\$ 1,029,967.83	\$ 1,199,405.00
(50% of life dues +)											

Table 3. Benefits – access to still be addressed

Campus partners
Alumni Center – 10% discount on space rentals
CCE – up to a 15% discount on non-credit courses
Hornet Bookstore – 10% discount
Library – access privileges
The WELL – membership eligibility

Table 4. Benefits available to all alumni

Campus partners
Alumni Grove – reservation privileges
Aquatic Center – 15% discount on equipment rentals, lessons, and activities
Athletics – discount on tickets
Peak Adventures – affiliate pricing and 10% discount on equipment rental
Theatre & Dance – student price on all performances
Off-campus partners
Andrea Weiss Career Counseling and Development – 20% discount
Balfour
California Moving Systems – 10% off
Casque Wines – 20% off
Farm Fresh to You – \$10 discount on first box
Forever Resorts – 10% discount
Spare Time Health Club – no initiation fee
Hotels – discounts at participating hotels
iCanvas.com – 60% discount
Legal services provided by Rebecca A. Gardner, HMS Law Group LLP – 15% discount
Liberty Mutual – group discount
Online shopping discounts
Rental car discounts
Sacramento Business Journal – discount on subscription
Shear Comfort Ltd. – 5% discount
Wild at Work – discount tickets

Appendix II

Research: Environmental Scan

Over the last decade, there has been significant discussion of membership dues and its correlation to philanthropic giving. There is data that illustrates that dues paying members make better donors; there is data that showcases that the manpower involved in maintaining a membership program takes away from true alumni engagement and focuses only on the transaction; and there is data that illustrates the confusion of alumni between membership dues and annual giving solicitations. Here at Sacramento State, we are focused on growing the number of meaningfully engaged alumni. By reimagining our membership model, our goal is to remove perceived barriers to involvement that our current model presents.

These considerations and more have led many alumni associations across the country to re-evaluate their dues paying membership programs, if they had one. As we have delved deeper into looking at what is right for the alumni of Sacramento State, we spent some time looking at best practices and found that most schools that have changed their membership model now fall into one of three categories:

- Category 1: Reformatted their existing membership dues program
- Category 2: Reinvented membership dues with a universal “everyone’s a member” level
- Category 3: Dropped membership dues entirely and added an annual giving model

Category 1: Reformatted their existing membership dues program

Reformat existing membership dues program to determine the “gift” portion of the membership and highlight the gift/tax deductibility of dues. Minimal change to existing operations. Would need to work with Advancement Services to process “gift” portion. Schools in this category include:

UCSF Alumni Association

Model where all alumni are members regardless of paying dues; dues are clearly defined and stated as charitable contributions. Like page layout.

Wisconsin Alumni Association

Stanford Alumni Association

University of Minnesota Alumni Association

Good – defines deductible amount.

Ex-Students’ Association, University of Texas

80% of membership dues are tax-deductible.

University of Nebraska Alumni Association

Good description of what is deductible.

Category 2: Reinvented membership dues with a universal “everyone’s a member” level

Reinvented membership dues with a general “everyone’s a member” level and options to give and join at a higher level of membership. Some schools retained existing membership levels and just added the “general” level; some schools overhauled and simplified the membership levels. Key communication for each focused on “everyone’s a member” and “we’re building a more inclusive Association” messages. Would require

bylaws update; gift processing; benefits restructuring; chapter funding restructure; etc. Schools in this category include:

UCLA Alumni Association

In, 2017 moved to an “everyone’s a member” model. They also started their own “annual fund” encouraging alumni to give at the “Blue (\$100+/year)” or “Gold (\$1,000 one-time gift)” level; they still reference it as “joining” and the whole website is about “membership.” Previous life members can make a one-time \$600 donation to become a “Gold Member.”

Chico State Alumni Association

Changed to “all-inclusive model” but continue to have a “Sustaining Wildcat Membership (\$100+/year)” and a “Wildcat for Life Membership (\$500 one-time payment).” These are both paid directly to the Alumni Association.

The Ohio State Alumni Association

Adding “all inclusive” membership level.

UNLV

All alumni are members; then there are annual and lifetime VIP membership levels.

University of Illinois

Pioneered elimination of membership dues; seems to be a dues based model again.

Category 3: Dropped membership dues entirely and added an annual giving model

Dropped membership dues entirely and added an annual giving model housed in the Alumni Association. Key communication for each focused on “we’re building a more inclusive Association” by dropping membership dues message but “we still want you to support scholarships and vital alumni programs.” Some of the schools retained a life membership level. Would require bylaws update; gift processing; benefits restructuring; chapter funding restructure; etc. Schools in this category include:

SDSU

Dropped annual dues in 2014; kept lifetime dues.

Fresno State Alumni Association

Dropped dues and started their own annual giving program. Gifts go directly to FSAA. They have their own donor recognition levels, etc.

Michigan State University

Dropped membership dues in 2016; shifted entirely to Annual Giving.

University of Iowa

Dropped membership dues in 2017-18.

Created a new Advancement model merging AA and Foundation.

Pitt Alumni Association

Dropped membership dues in 2016; you can still be a life member.

FIU Alumni Association

Dropped dues in favor of a giving model; converted all past membership payments to donations; offer a “Forever Panther” level equivalent to a life membership.

UC Santa Barbara

Recently dropped their membership program and started essentially an “annual fund” called “Gaucho for Life.”

Resources

- Alumni Association Funding Models (whitepaper)
<http://napagroup.com/2010/11/15/alumni-association-funding-models-summary-findings-from-20-universities/>
- Alumni Association Funding Models Research
<http://www.napagroup.com/pdf/Alumni%20Association%20Funding%20Survey.pdf>
- CASE article - Dues or No-Dues
http://www.case.org/Publications_and_Products/2014/April_2014/Dues_or_No_Dues.html
- IRS Publication 526 which governs 501 (c)3 Membership Dues and deductibility
<https://www.irs.gov/pub/irs-pdf/p526.pdf>
- Tax status language
http://clubs.alumni.umich.edu/clubleaders/tax_issues
- Trends in Alumni Relations (whitepaper)
<http://napagroup.com/2018/01/02/trends-in-alumni-relations/>
- TurboTax Advice
<https://ttlc.intuit.com/questions/3638583-can-i-claim-college-alumni-membership-fees>

Sacramento State Enrollment Overview - Fall 2020

Term	Year	Career	Class Level	Cohort	College	Department	Major	Full/Part Time	Residency	Enroll Status	
Fall	2020	All	All	All	All	All	All	All	All	All	
STUDENT HEADCOUNT		STUDENT FTES		AVG UNIT LOAD		AVG TERM GPA		AVG SAC STATE GPA		AVG CUMULATIVE GPA	
31,451		27,546.57		12.98		2.962		3.043		3.064	

COLLEGE			DEPARTMENT			MAJOR		
Health and Human Services	22%	6,906	Business Administration	12%	3,741	Health Science BS	5%	1,456
Social Sciences and Interdiscipl.	19%	5,848	Psychology	6%	1,918	Psychology BA	4%	1,303
Engineering and Computer Sci.	15%	4,707	Criminal Justice	6%	1,866	Biology (Pre-Major)	3%	1,039
Arts and Letters	13%	4,132	Biological Sciences	5%	1,678	Criminal Justice BS	3%	1,027
Business Administration	12%	3,741	Computer Science	5%	1,652	COMS (General) BA	3%	986
Natural Science and Math	9%	2,734	Communication Studies	5%	1,649	Computer Science (Pre)	3%	875
Education	8%	2,483	Health & Human Services	5%	1,456	Mechanical Engineering BS	3%	839
Special Programs	3%	905	Undergraduate Studies in Educ	5%	1,449	Undeclared	3%	819
			Kinesiology	4%	1,236	Expressed Interest CRJ	3%	809

Enrollment Statistics

ENROLLMENT STATUS		CLASS LEVEL		UNIT LOAD	
Continuing	71% <div></div> 22,241	Freshmen	16% <div></div> 4,906	<=6	9% <div></div> 2,798
First Time	15% <div></div> 4,675	Sophomore	12% <div></div> 3,833	7-11	12% <div></div> 3,834
Transfer	14% <div></div> 4,258	Junior	30% <div></div> 9,316	12	19% <div></div> 6,090
Returning Transfer	0% <div></div> 129	Senior	34% <div></div> 10,645	13-14	17% <div></div> 5,388
Returning	0% <div></div> 87	Masters	7% <div></div> 2,068	15+	42% <div></div> 13,346
Transitory	0% <div></div> 66	Doctoral	0% <div></div> 120		
		Teaching Credential	1% <div></div> 373		
		Other	1% <div></div> 195		
CAREER		FULL/PART TIME		RESIDENCY	
Undergraduate	91% <div></div> 28,700	Full Time	81% <div></div> 25,449	Resident	97% <div></div> 30,631
Graduate	9% <div></div> 2,756	Part Time	19% <div></div> 6,007	Non-Resident	3% <div></div> 825

Key Stats

PELL ELIGIBLE		FIRST GENERATION		UNDERREPRESENTED MINORITIES	
Yes	42% <div><div></div></div> 13,116	Yes	31% <div><div></div></div> 9,871	Yes	42% <div><div></div></div> 13,273
No	58% <div><div></div></div> 18,340	No	69% <div><div></div></div> 21,585	No	58% <div><div></div></div> 18,183

Demographics

IPEDS RACE		RACE SPECIFIED		AGE	
Hispanic/Latino (any race)	35% <div></div> 11,004	HISPANIC			
White	26% <div></div> 8,045	Mexican	9% <div></div> 2,936	ASIAN	
Asian	19% <div></div> 5,976	Salvadoran	0% <div></div> 106	Filipino	2% <div></div> 611
Black	6% <div></div> 1,918	Spanish	0% <div></div> 96	Asian Indian	1% <div></div> 291
Two or More Races	6% <div></div> 1,845	Other Latino, Hispanic	0% <div></div> 70	Hmong	1% <div></div> 283
Unknown	4% <div></div> 1,180	Guatemalan	0% <div></div> 63	Chinese	1% <div></div> 257
Non Resident Alien	4% <div></div> 1,137	Puerto Rican	0% <div></div> 46	Vietnamese	1% <div></div> 249
Pacific Islander	1% <div></div> 278	AMERICAN INDIAN		Japanese	0% <div></div> 108
American Indian	0% <div></div> 73	Other American Indian Tri..	0% <div></div> 153	PACIFIC ISLANDER	
VETERAN STATUS		Latin American Indian	0% <div></div> 38	Fijian	0% <div></div> 66
Veteran	1% <div></div> 465	Miwok	0% <div></div> 13	Hawaiian	0% <div></div> 33
Dependant	6% <div></div> 1,772	Pomo	0% <div></div> 4	Guamanian	0% <div></div> 30
Non-Veteran	93% <div></div> 29,219	Ohlone	0% <div></div> 4	Other Pacific Isla..	0% <div></div> 24
		Chumash	0% <div></div> 4	Samoan	0% <div></div> 15
		WHITE		Tongan	0% <div></div> 10
		European	10% <div></div> 3,179	AFRICAN AMERICAN	
		Other White	1% <div></div> 307	African American	2% <div></div> 532
		Middle Easterner	1% <div></div> 215	Black	1% <div></div> 353
		North African	0% <div></div> 16	Other Black	0% <div></div> 55
		No Response	88% <div></div> 27,739	Haitian	0% <div></div> 4
				No Response	97% <div></div> 30,512
				AGE	
				Under 18	2% <div></div> 583
				18-20	34% <div></div> 10,707
				21-22	24% <div></div> 7,612
				23-24	15% <div></div> 4,688
				25-29	15% <div></div> 4,718
				30-49	9% <div></div> 2,899
				50-64	1% <div></div> 238
				65 and Over	0% <div></div> 11
				GENDER	
				Female	57% <div></div> 17,988
				Male	43% <div></div> 13,456
				Nonbinary	0% <div></div> 12

Geography

CALIFORNIA COUNTIES

97%
30,661

County	Percentage	Cases
Sacramento	44%	13,771
San Joaquin	7%	2,208
Placer	6%	1,871
Solano	5%	1,497
Yolo	4%	1,199
Contra Costa	4%	1,183
Los Angeles	3%	816
Alameda	2%	658
El Dorado	2%	599

US STATES (Excluding CA)

1%
190

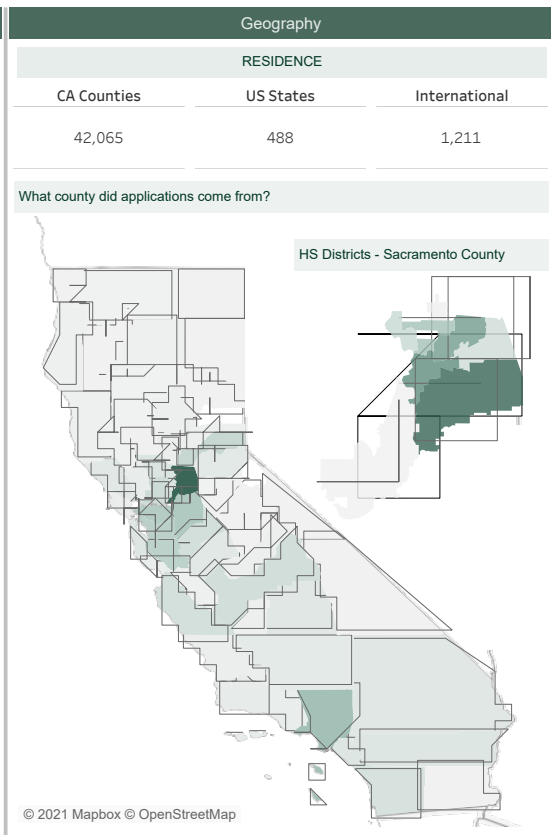
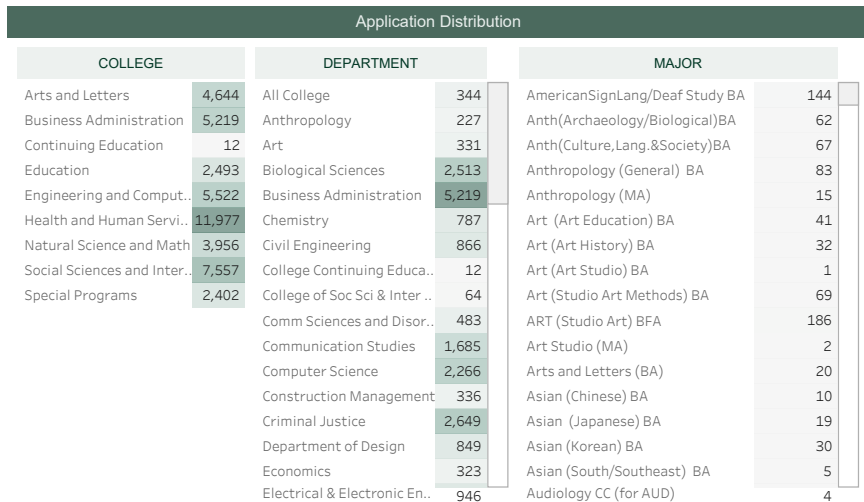
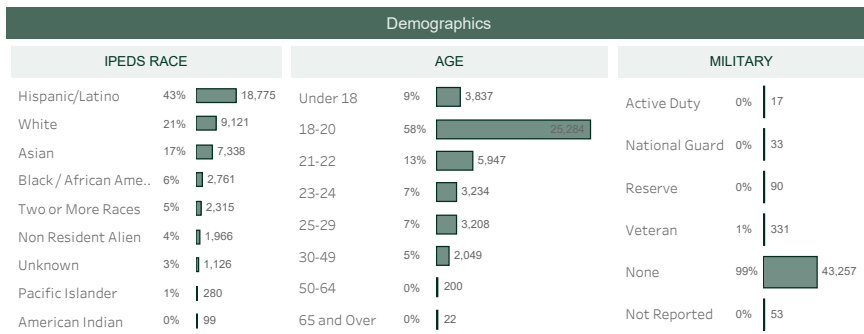
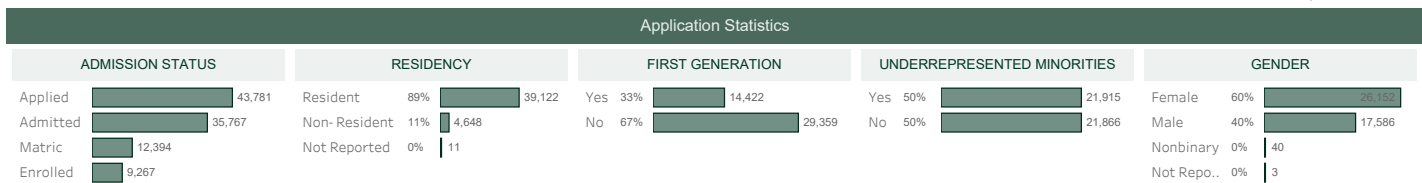
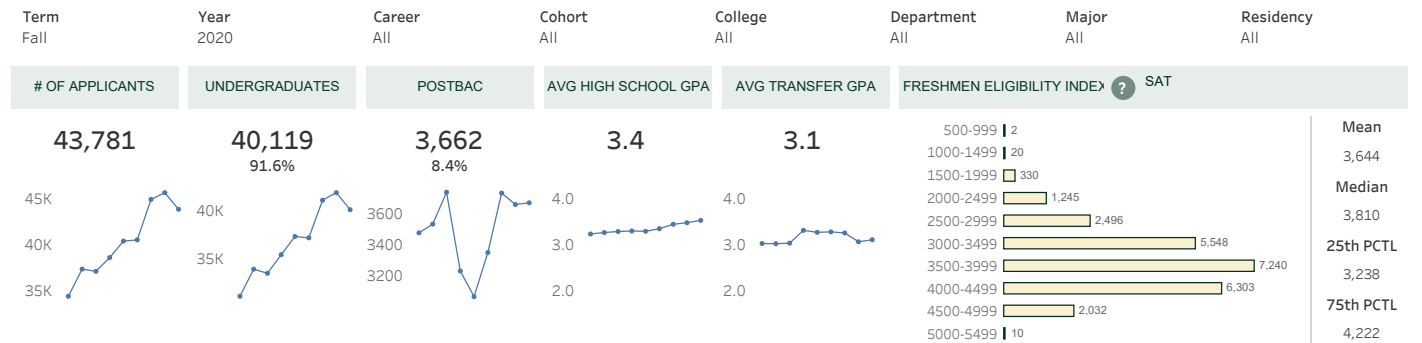
State	Percentage	Cases
Washington	0%	41
Hawaii	0%	26
Arizona	0%	25
Colorado	0%	14
Nevada	0%	12
Oregon	0%	8
Illinois	0%	6
Minnesota	0%	6
Texas	0%	6

COUNTRIES (Excluding US)

2%
550

Country	Percentage	Cases
India	40%	221
Saudi Arabia	8%	46
Peoples Rep of China	8%	46
Viet Nam	7%	36
Korea (the Republic of)	3%	17
Canada	2%	13
Nigeria	2%	10
Myanmar	2%	9
Japan	1%	8

Sacramento State Admissions Overview - Fall Semester 2020



Sacramento State Student Retention - First-Time Freshmen

Looking at students that started in Fall 2016 and when they graduated.

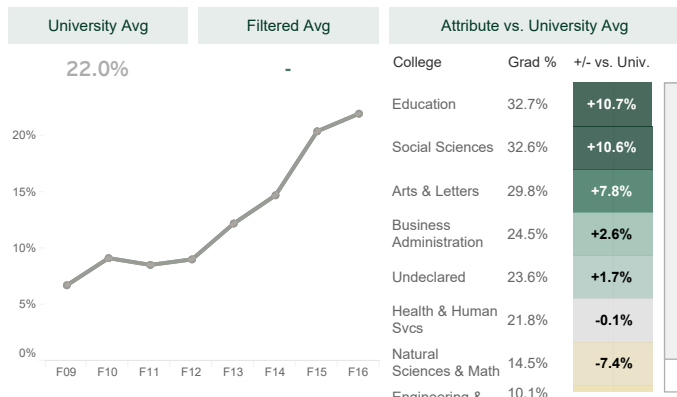
Attribute: College | First-Time Freshmen or Transfer: First-Time Freshmen | College: All | Department: All | Major: All | Pell Eligible @ Entry: All | First Generation @ Entry: All | Gender: All | IPEDS Race: All

GRADUATION RATES - First-Time Freshmen

?

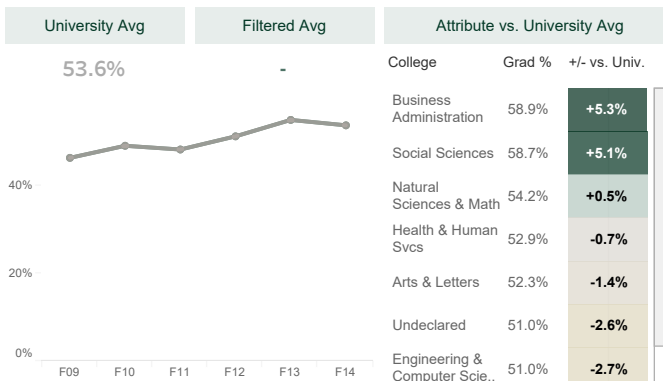
4-Year Graduation, Cohort Performance:
University Avg vs. Filtered Avg

Select Cohort
Fall 2016



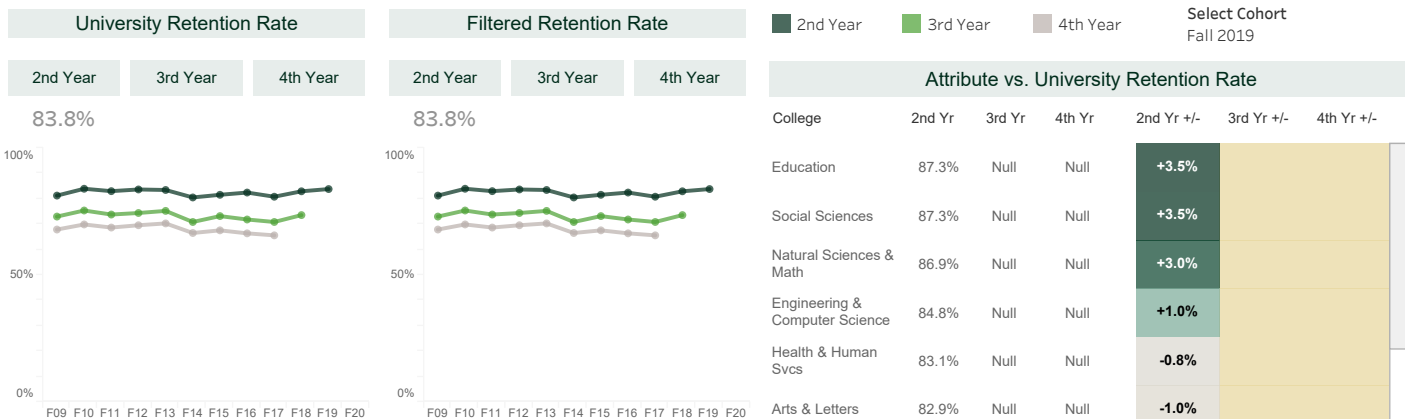
6-Year Graduation, Cohort Performance:
University Avg vs. Filtered Avg

Select Cohort
Fall 2014



RETENTION RATES - First-Time Freshmen

?



Sacramento State Student Retention - Transfer Students

Looking at students that started in Fall 2016 and when they graduated.

Attribute
College

First-Time Freshmen or Transfer
Transfers

College
All

Department
All

Major
All

Pell Eligible @ Entry
All

First Generation @ Entry
All

Gender
All

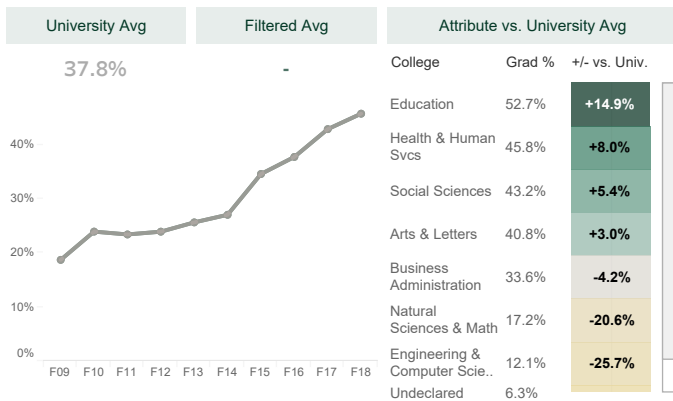
IPEDS Race
All

GRADUATION RATES - Transfers

?

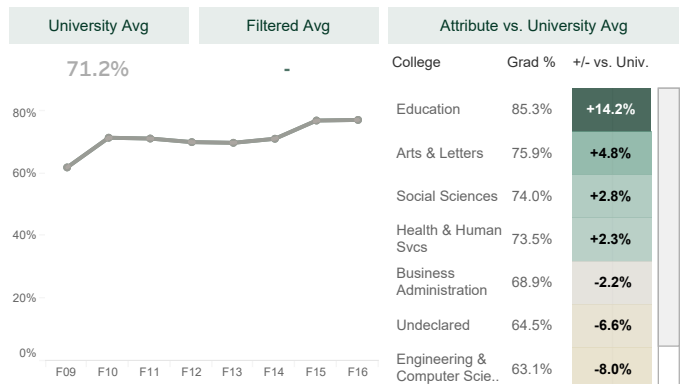
2-Year Graduation, Cohort Performance:
University Avg vs. Filtered Avg

Select Cohort
Fall 2016



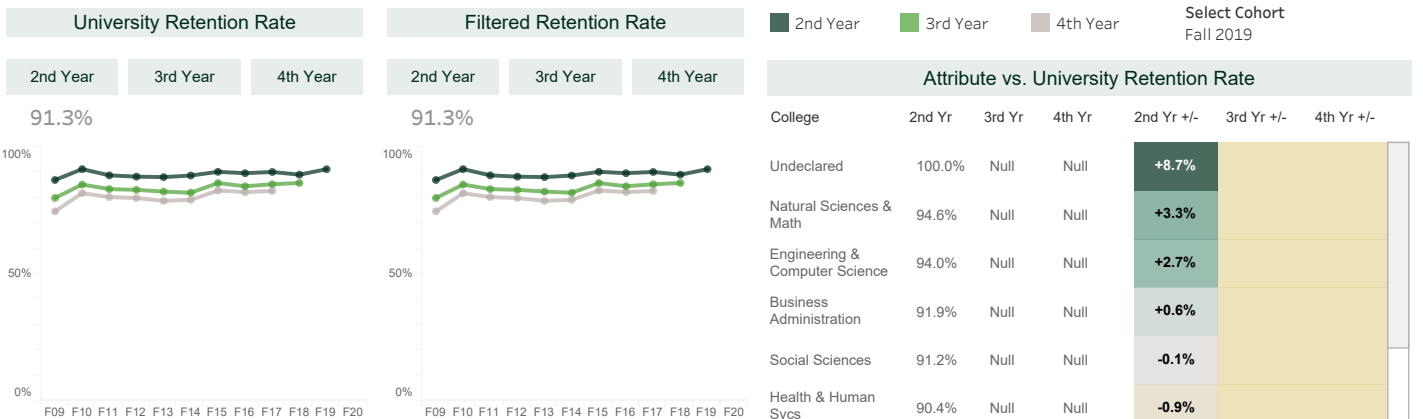
4-Year Graduation, Cohort Performance:
University Avg vs. Filtered Avg

Select Cohort
Fall 2014



RETENTION RATES - Transfers

?



Sacramento State Degrees Awarded - Academic Year 2019-2020

Degree Type
All

Academic Year
2019-2020

College
All

Department
All

Major
All

