

## **The University Foundation at Sacramento State**

### **ADOPTED MISSION STATEMENT**

#### **Mission Statement:**

“The University Foundation promotes philanthropy to provide a level of excellence at the University beyond what is possible through state funds.

The members of the board of directors of The University Foundation accomplish this mission by helping to raise private resources that advance the mission and priorities of the University and serving as ambassadors for philanthropy in the University community. The board provides stewardship in the prudent investment of resources, ensuring the integrity of The Foundation through accountability and transparency in its dealings.”

# The University Foundation at Sacramento State

## Board Member Responsibilities and Expectations

### Mission Statement

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### Role of a Board Member

The primary role of a volunteer board member is to assist The University Foundation’s mission in providing philanthropic support for needs that are in concert with the strategic goals of Sacramento State. Board members fulfill this role as a representative by promoting the Foundation’s mission in the community, being actively involved in the life of the University, and monitoring the prudent investment of the Foundation’s assets.

### General Obligations of a Board Member

Board members are expected to commit to the following:

- General Board membership is a three year term. Members may be appointed to serve a shorter term as a result of current board appointments or as a student representative.
- Board members are expected to attend quarterly board meetings and an annual retreat. Board members unable to attend three of four meetings a year may be excused from the Board at the discretion of the President.
- Board members are expected to serve on a standing committee or sub-committee. Appointment to a committee will be made at the recommendation of the Chairman and the concurrence of the Board member.
- Board members are expected to assist with donor cultivation. This may involve identifying donor prospects, attending cultivation meetings with prospects and University Development staff, and assisting with donor stewardship. A board member generally will not be expected to make an “ask” for gift unless appropriate. Board members are expected to be involved with the development of two “asks” annually.
- University Foundation Board members are advocates of the University, and the Foundation. Board members should have active involvement with campus deans, faculty and staff, and

University Advancement development officers to learn about campus programs and how to promote the university's philanthropic needs in the community.

- Board members are expected to attend various university and community functions as a representative of the Foundation and Sacramento State. This may include campus events such as dinners or lunches with the campus community, student or alumni recognition events, and commencement. Occasionally board members will be asked to attend banquets or receptions sponsored by community organizations or local government.
- Board members are expected to assist the Board Development Committee in the identification of future board prospects.
- Philanthropic support for Sacramento State is an integral part of Board responsibility. Therefore, 100% participation is expected. Each Board member is expected to make a significant annual contribution to the University or The University Foundation. Gifts may be directed toward Foundation initiatives, endowments, scholarships, or other approved campus programs and activities.

**Commitment:**

*As a member of the Board of Directors of The University Foundation at Sacramento State, I hereby agree to the responsibilities and expectations as outlined above.*

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Term of Service: \_\_\_\_\_

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### LOOKING AFTER YOUR INVESTMENT

A gift to Sacramento State is an expression of support for the University. But it is also a statement that donors trust the University to treat their contributions with care.

Looking after that investment is the role of The University Foundation at Sacramento State.

#### History and vision

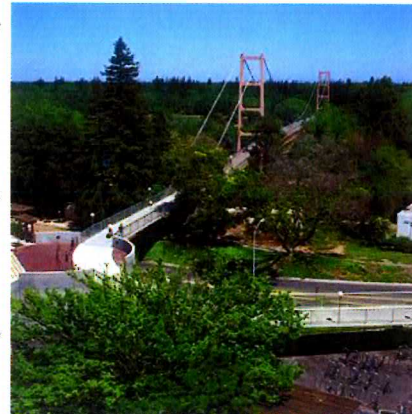
For more than 20 years, The University Foundation at Sacramento State has served as the University's primary philanthropic auxiliary, actively supporting the University's mission of teaching, learning and service by acquiring and managing financial and other resources for the University.

As of July 1, 2006, the California State University, Sacramento Trust Foundation has been renamed The University Foundation at Sacramento State. The University Foundation at Sacramento State has served as the University's primary philanthropic foundation, and the new name better reflects this important role.

The University Foundation was established in 1986 as the CSUS Trust Foundation to acquire and manage financial and other resources for the University. Its founding was a key step toward strengthening the fund-raising program at Sacramento State. It oversees gift funds to Sacramento State, which are held in non-state accounts, audited annually and invested prudently. It is a tax-exempt, 501(c)(3) organization and a recognized auxiliary of Sacramento State.

The University has raised millions of dollars in private support, funds that are vital to enhancing the quality of education for current and future Sacramento State students. The Foundation provides a unique and invaluable service to the campus by prudently investing endowment funds with the goal of generating a reliable income stream while assuring long-term growth. As a 501(c)(3) organization, The University Foundation has greater flexibility in investments than the University, which as a political subdivision of the State of California may not invest in securities.

Donors may give gifts to The University Foundation at Sacramento State for specific campus purposes and obtain tax benefits in accordance with State of California and United States federal laws. All funds managed by the University Foundation at Sacramento State are used for the benefit of the University, honoring any restrictions placed on them by the donor. Gift funds are held in non-state accounts, audited annually and invested prudently.



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### GOVERNANCE

The University Foundation's volunteer board of directors exemplifies the broad regional support the University enjoys. Members of the board represent a cross-section of alumni, faculty, students and members of the community, who offer guidance in their specific areas of expertise to broaden fund-raising opportunities for the University.

The board relies on four committees--Executive, Investment, Audit and Nominating--to carry out its goals. They share a common goal of maximizing private support for the campus. The Board is responsible for managing and investing gift funds to ensure that they can fulfill their designated purpose.

Board members are valued assets in and of themselves. They are among the University's most fervent advocates because they believe in the mission of the University and the life-changing opportunities Sacramento State offers to students.

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### FUND MANAGEMENT AND INVESTMENT

The Foundation receives and manages gifts in support of Sacramento State. Gift types include endowments, current use gifts and planned gifts. Donors can give gifts of cash, securities or real estate, which can be used to fund either an endowment or a current use account.

#### Current use gifts

Current use or expendable gifts cover a broad range of uses and are given with the expectation that they will be used in the near future. They also include the "annual funds" that provide discretionary support for departments and colleges on campus. Gifts can be restricted--where the donor specifies how the gift will be used--or unrestricted, where the beneficiary makes the determination.

#### Endowments

Funds designated for endowments provide ongoing support. Endowments are made with the expectation that only the earnings on the principal will be used to meet the donor's philanthropic intent and that the funds will be invested to provide an income stream in perpetuity. Building the University's endowment will help secure continuous funding for students and faculty, enrich academic and campus programs, and encourage strategic planning.

#### Planned gifts

The University Foundation also oversees planned gifts for those donors who wish to include the University in their estate plans.

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