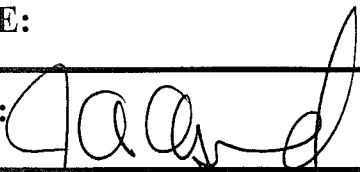




POLICY NO. 108.4

ISSUE DATE: October 16, 1997 REVISION DATE:	POLICY: Office of Development
REFERENCE:	
APPROVED: 	

It is the policy of The California Maritime Academy to carry out all activities of Development or University Advancement under the leadership and direction of the Office of the President. This policy has been established to ensure that all development or advancement activities are carried out with the full knowledge, approval, and leadership of the President.

The Office of **Development or University Advancement** is charged with the following mission:

* To create opportunities for recognition, understanding, and support of The California Maritime Academy (CMA) by promoting the visibility, stature, and mission of CMA on campus and with local, regional, national, and international communities, governmental organizations, elected officials, alumni, civic and philanthropic organizations, cultural institutions, professional associations, other campuses of The California State University and the broader university community, potential students, business and industry, media, CMA friends, the general public, and CMA faculty, staff, and students.

* Through the leadership of the President, to assist the campus, its various departments, faculty, staff, and students, to identify, cultivate, and successfully attract recognition, investment, and support from non-governmental and governmental sources.

To accomplish this mission the major **goal** of the Office of Development or University Advancement is to establish, organize, and maintain a comprehensive resource development strategy that incorporates all areas of the advancement function, including appropriate marketing of CMA and its mission. It is the objective of the Office of Development or University Advancement to provide management and coordination of this activity.

Major Activities of the Office of Development or University Advancement include the following.

Campus Strategic Planning and the preparation of a Campus Annual Plan.

This activity includes the establishment and plan for realizing the campus' fundraising goals, with emphasis on unrestricted gifts, endowment(s), and cash giving.

Leadership/Coordination in the areas of Governmental and Legislative Relations.

Leadership/Coordination in the areas of Public Affairs, including Media Relations,

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- Communications, Publications, and Special Events.
- Preparation and Submission of Development/Donor Reports, such as the Voluntary Support and Special Revenues Report to the Chancellor and Council for Aid to Education.
- Participation in the Implementation, Leadership, and Expansion of the CMA Scholarship Program.
- Supervision of a Successful Alumni Affairs Program at CMA.
- Liaison with the Board of Directors and staff of the CMA Foundation, including Service on the California Maritime Academy Foundation, Inc., Board of Advisors.
- Liaison with the National Officers, Board of Directors, and staff of the CMA Alumni Association.
- Cultivation and Support of Advancement Leadership among CMA Faculty
- Leadership/Coordination in the Cultivation and Solicitation of Major Gifts, Including the Use of Information Technology and Data Systems to record Donor History and Donor Recognition and Reward, and manage Prospect Research, Cultivation, and Approach.
- Coordination and Support of Successful Applications to Foundations and Corporations, including Identification of New Funding Sources, Approach to Program Staff, Preparation of Written Materials including Proposals and Letters of Intent, Grants Tracking, and Foundation and Corporate Donor Acknowledgment.
- Coordination of Activities with regard to Planned Giving, including Familiarity with Financial, Estate, and Tax Planning and Techniques in Charitable Giving, and Administration and Operation of a Planned Giving Program.
- Identification of and outreach to Traditional and New Sources of Support, including Individual and Major Donors, Parents, Alumni, Friends, Community, Service, and Professional Associations, Foundations, Corporations, and Government.
- Creation, Identification, and Cultivation of Opportunities for Resource Sharing and Charitable Giving
- Support of CSU Board of Trustees' Public Affairs and Advancement Activities, including Initiatives such as the Year of the Alumni (1996) and Ambassadors for Higher Education (1997).
- Participation in the CSU University Advancement Academy, securing resources and support from the University Advancement Fund and participating in collaborative resource-sharing in The California State University.
- Participation/ Leadership with other Chief Advancement Officers in support of the Vice Chancellor for University Advancement and the Chancellor of The California State University.
- Representation of CMA in appropriate local, regional, and national community, service, cultural and professional associations and

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Participation/Leadership in appropriate professional associations, such as the Council for the Advancement and Support of Education, the National Society of Fund-Raising Executives, the National Council on Planned Giving, and the Council for Aid to Education.