



POLICY NO. 108.4

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

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.

Coordination and Supervision of Administration and Leadership of 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,

participating in collaborative resource-sharing in The California State University.

Participation in Leadership with Chancellor and the Chief of Staff 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.