



100 Campus Center ~~~ Seaside, CA ~~~ 93955-8001

Memorandum

TO: Foundation Board of Directors
CC: Barbara Zappas, Foundation CEO

FROM: Nancy Ayala
DATE: September 1, 2023

SUBJECT: Agenda and Read-Ahead Materials

Enclosed are the agenda and read-ahead materials for the Foundation Board of Directors meeting on Friday, September 8, 2023. The meeting will begin at 9 a.m. at the Alumni and Visitors Center on campus. Meeting instructions were emailed.

Please note that a photo of the Board will be taken promptly at 9 a.m. The photographer will be available to take headshots of board members starting at 8:30 a.m. If you're interested, please let me know.

If you have any questions or concerns before the Board meeting, please contact me at nayala@csumb.edu.



100 Campus Center ~~~ Seaside, CA ~~~ 93955-8001

Board of Directors Meeting

Friday, September 8, 2023 9:00 a.m. – 11:00 a.m.
Alumni and Visitor's Center – Lobby

Light Breakfast will be served.

Photo of the Board will be taken at 9:00 a.m.

AGENDA

- | | | |
|-------------|--|-------------|
| I. | Call to Order | B. Saxon |
| 5 min. | <i>(Self introduction of all board members)</i> | |
| II. | Governance | B. Saxon |
| 5 min. | A. Nominating Committee Report | |
| | <i>(Action: Discussion and motion to elect the directors as presented)</i> | |
| | B. Appointment of Standing Committee Members | B. Saxon |
| | <i>(Action: Discussion and motion to elect the directors as presented)</i> | |
| III. | Approval of Minutes | |
| 2 min. | Approval of June 9, 2023 meeting minutes | B. Saxon |
| | <i>(Action: Discussion and motion to approve the minutes)</i> | |
| IV. | Public Comment | B. Saxon |
| V. | Reports | |
| 20 min. | A. President's Report | V. Quiñones |
| 15 min. | B. Provost's Report | A. Lawson |
| 15 min. | C. CFO's Report | G. Nelson |
| 20 min. | D. Foundation CEO's Report | B. Zappas |
| | • Campaign Consultant CCS Update | |
| 5 min. | E. Investment Committee Report | G. Lehman |
| 5 min. | F. Chair's Comments | B. Saxon |
| VI. | Presentation | |
| 10 min. | Campus Marketing and Branding Update | A. Bryant |

Note: In accordance with Education Code §89921 and Foundation Bylaws Article VII §5, this agenda provides notice of the business to be transacted (i.e., topics for Board discussion). Action may be taken on any item on the agenda. The italicized notations above are for guidance purposes only and the Board may take action on any item listed on the agenda, whether action is specifically prescribed.

VII. Open Communications/Announcements

B. Saxon

The next Foundation Board meeting will be on December 8, 2023.

VIII. Closed Session

In accordance with Education Code § 89923

IX. Adjournment

B. Saxon



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Memorandum

TO: Foundation Board of Directors
CC: Barbara Zappas, Foundation of CEO
FROM: Nancy Ayala
DATE: August 30, 2023

SUBJECT: Nominating Committee Report – Director Nominations

The Nominating Committee has recommended the appointment of the following Directors for the term specified:

Rachel Molatore (Community Member)	1 year (through June 2024)
Jill Hosmer (Faculty Member)	2 years (through 2025)

At the meeting on Friday, September 8, 2023, the Board will be asked to vote on the nominations and appointments. Foundation staff recommends the approval of these nominations and appointments.

If you have any questions or concerns before the Board meeting, please contact me at nayala@csumb.edu.

Rachel Molatore | Director of Communications, Taylor Farms

Rachel Molatore has been a part of the agricultural industry for 16 years and with the Taylor Farms team for 12 years now. During her time at Taylor Farms she has held various sales and business development roles and now leads corporate communications. She has worked closely with customer partners to build comprehensive supply chain solutions and driven growth for the Retail Division. Her passion lies in helping Americans eat more great-tasting, healthy fresh foods!

Rachel earned a B.A. in Agricultural Business Management from Cal Poly San Luis Obispo. She appreciates the continued knowledge, experiences, and relationships she has established along the way in the fresh produce industry. Rachel has extreme gratitude for the industry, her teammates, her faith and family. Rachel and her husband, John, have two children - Dominic and Jane.



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Memorandum

TO: Foundation Board of Directors
CC: Barbara Zappas, Foundation CEO
FROM: Nancy Ayala
DATE: September 1, 2023

SUBJECT: 2023/24 Appointments to Standing Committees, Foundation Board

The proposed appointment recommendation for the Auxiliary's Audit Committee for a one-year term is as follows:

Michal-Anne Miller (University) Audit Committee Chair

The proposed appointment recommendation for the Auxiliary's Investment Committee for a one-year term is as follows:

Michal-Anne Miller Investment Committee (University)

At the meeting on Friday, September 8, 2023, the Board will be asked to vote on the appointments of standing committees. Foundation staff recommends approving the appointments as presented.

If you have any questions or concerns before the Board meeting, please contact me at nayala@csumb.edu.



Board of Directors Meeting

Friday, June 9, 2023 9:01 a.m. – 10:48 a.m.
Virtual meeting via Zoom

Draft, Minutes

<u>Board Members Present</u>		<u>Members Absent</u>
Bettye J. Saxon, Ed.D., Chair	Vanya Quiñones, President	Anna M. Caballero, Director
Barbara Zappas, CEO	Maria Bellumori, Director	Gordon Eubanks, Director
Michael McMillan, Director	John Jimenez, Director	Mac Clemmens, Director
Jonathan Merrill, Director	Glen Nelson Director	Debbie Juran, Secretary
		Bud Colligan, Director
		Ted Balestreri, II, Director
		Gregory Gonzalez, Director
		Betsey Pearson, Director
		Steven Packer, M.D., Director
<u>Guests</u>		<u>Staff Present</u>
Susan Lansbury	Ian Oglesby	Nancy Ayala, Gov. & Compl. Mgr.
Adrian Villalpando		
<u>Presenters:</u>		
Sherry Baggett, Auxiliary Controller		
Glen Nelson, Vice President of Admin and Finance		
Katherine Kantardjieff, Vice President for Academic Affairs		
CCS Fundraising: Fundraising Consulting Firm		

Annual Meeting

- I. Call to Order:** A quorum being established, Chair Bettye Saxon called the meeting to order at 9:01 a.m.
- II. Governance:**
 - A. Nominating Committee Report: Moved by Director Michael McMillan and seconded to elect the Directors as presented. With no further discussion, the motion carried.
 - B. Election of Board Officers: Moved by Director Glen Nelson and seconded to adopt the slate of Officers as presented. With no further discussion, the motion carried.
 - C. Appointment of Standing Committee Members: Moved by Director McMillian and seconded to adopt the standing committee appointments as presented. With no further discussion, the motion carried.
- III. Adjournment:** With no objections, the annual meeting adjourned at 9:04 a.m.

Regular Meeting

- I. Call to Order:** A quorum being established, Chair Saxon called the meeting to order at 9:04 a.m.
- II. Approval of Minutes:** Moved by Director McMillan and seconded to approve the March 10, 2023 meeting minutes as presented. With no further discussion, the motion carried.
- III. Public Comment:** There were no requests made for public comment.

IV. Business

- A. 23/24 Budget Request: Controller Sherry Baggett presented the 2023/24 Budget Request, noting that the Foundation does not generate operating revenue beyond interest income. The higher expenses on the budget are staff costs to manage the Foundation's books and operations, investment consultant fees used to manage the endowment, and unrelated business income taxes resulting from investments in private equity funds invested in real estate. That real estate is encumbered by debt, and that triggers a tax. Other significant expenses are auditing fees and liability insurance. Legal and professional fees were increased due to an anticipated estate gift. The Corporation will subsidize the Foundation by \$341,879. Moved by Director McMillian and seconded to approve the 23/24 budget. With no further discussion, the motion carried.
- B. Endowment Investment Policy Amendment: Foundation CEO Barbara Zappas presented the Endowment Investment Policy revisions, noting the Investment Committee recommends revising the Endowment Investment Policy to introduce the Foundation's sustainability goals in §6 Investment Guidelines. The goal is to hold fossil fuel-related managers at 5% or less in the portfolio. This is the second read. The Board first reviewed the policy changes at the March meeting. Moved by Director Glen Nelson and seconded to approve the policy revisions as presented. With no further discussion, the motion carried.

V. Reports

- A. President's Report: President Vanya Quiñones provided an update on University activities. President Quiñones announced new leadership roles on campus and Provost Katherine Kantardjieff's retirement. Several departments on campus were restructured, including the Title IX position. President Quiñones reported on the CSU System-wide Title IX assessment. CSUMB did reasonably well in this assessment compared to sister campuses. Although the final report is still pending, the University is proactively developing and revising Title IX processes and establishing an implementation team.
- Two major concerns that arose during President Quiñones' listening tour were the campus's lack of communication and transparency. To address these concerns, President Quiñones implemented various events, including meetings and town halls open to the public, to promote open communication and transparency within the community. The President's Cabinet was restructured to include Deans, resulting in increased communication between the VPs and Deans and respective schools. Communication and transparency are being addressed across the Board at the University, including the University website. The website is being assessed to determine where improvements can be made.
- Currently, the contract with consultant CampusWorks is in its final stages. CampusWorks will review overall campus processes and offer recommendations to enhance the student experience and support student success. Student enrollment is still a significant concern since enrollment decreased by 12%. The Provost and others are working to increase student enrollment. Inclusion of the community is also essential. President Quiñones recognized Pride Month and announced the parade sponsorship on the Monterey Peninsula. Later this month, CSUMB will celebrate Juneteenth, and the University will sponsor the fourth annual Juneteenth Jubilee. President Quiñones thanked the Board for their continued support. Chair Saxon commended President Quiñones for the positive mark she is leaving in the community.
- B. CFO's Report: Vice President of Administration and Finance Glen Nelson provided an update on finances. Mr. Nelson reported that fiscal year 22/23 would end with a deficit of \$5M instead of \$9M. The campus community worked extremely hard to mitigate the situation by increasing expenditure scrutiny. Although still in the red, the University will end the year better than anticipated. Mr. Nelson presented the budget update for fiscal year 23/24, noting that \$2M was allocated for strategic initiatives to improve the student experience and increase enrollment and

retention. The 23/24 fiscal year begins with a \$5M deficit. After adjustments, Chancellor's Office mandates, initiatives, and cost recovery efforts, the revenues are approximately \$9M. Upcoming budget projects include providing a balanced budget, working on an incentive-based budget model, and standardizing reporting between colleges. Current campus activities include onboarding and recruiting key staff and the implementation phase of an organizational study to improve the Student Housing process. Mr. Nelson also reported on assigning campus-wide responsibilities to the Facilities department and the Corporation's operational audit. It was also reported that staff, including Ms. Zappas, have identified and secured funds for the new engineering building. This building is to have space to house NOAA, a federal agency. Although funding is secured and a federal grant of over \$7M was received to contribute to this project, this project is stalled at the state level because the University needs more capital before the project can be approved. There is a possibility to incur debt to start the project, but that would be a last resort. The Board could assist in this endeavor by speaking to the community about the need for the Engineering Building, and any funds raised would help in not incurring debt or incurring less debt. The shortfall is between \$30 to \$40M, and approximately \$24M has been raised by the University. The Salinas City Center is for sale, and any funds raised would be used to acquire other properties. Mr. Nelson provided an update on CARES Act funds. Campus received three rounds of funds granted in three categories: HEERF (\$25M) and MSI funds (\$2.9M), which are for institutional support relative to covid expense, and Student Support funds (\$20.3M), which are directly for students. The student support funds were spent on students. The HEERF and MSI funds were used to refund student housing and dining fees \$4M, lost revenues of state funding \$7.6M, debt service on housing \$8.3M, \$7.3M on covid related expenses, \$500K aided in covid associated initiatives.

- C. Provost's Report: Provost Katherine Kantardjjeff reported on academic affairs. Ms. Kantardjjeff reported changes to summer state support programs, which generated 386 FTEs, and for Fall 2023, continuing students are expected at approximately 3,500. First-time freshmen are expected at 1,250 and 870 transfer students. Enrollment is still down and needs to stay within the 10% state-allocated target, so the budget remains flat and is not cut in a subsequent academic year. Efforts around student success were initiated to increase retention. Ms. Kantardjjeff reported on program development to increase student success, including the mobilization to plan and implement legislation AB 928, which mandates students in the lower division of community colleges, CSUs, and the University of California have one common general education pattern so students can move between the systems, and can make more rapid progress towards degrees. Most CSUs must cut five units of their general education requirements. It will significantly impact specific programs that do many of our general education servicing structures. The Guaranteed Admission program for all students in the service area. Students who complete the CSU requirement for admissions are automatically admitted to CSUMB as high school freshmen. Equity priorities, working groups, and reorganization updates were also presented.
- D. CEO's Report: Foundation CEO Barbara Zappas welcomed fundraising consultant CCS to provide an update on the feasibility study. Frederick "Rick" Happy, Chairman; Lydia LaSalle, Director; and Ted Blackburn, Managing Director, provided recommendations from the feasibility study final report. Overall perception of the University is "very positive" or "positive". The same feedback was found in the background statement outlining CSUMB's future goals. Three campaign priorities that tested positively were high-impact learning, classroom-to-career pathways, and capital investments. Based on data analysis, planning study responses, dialogue with the Advancement team, and gift indications, CCS believes CSUMB has the philanthropic capacity within its donor audience to support a working goal between

\$100M - \$120M. President Quiñones thanked CCS for the update. CCS will provide the next steps at the next meeting.

- E. Chair's Comments: Chair Saxon thanked CCS for their thorough report. Chair Saxon thanked and recognized exiting board members for supporting the Foundation. Members included Maria Bellumori, Sen. Anna Caballero, Bud Colligan, Gordon Eubanks, Steven Packer, M.D., John Jimenez, Michael McMillan, and Carrie McIntyre Panetta. Chair Saxon acknowledged that although there are issues on campus, the plans set forth by the Administration provide hope that the University is going in the right direction.

VI. Open Communications/Announcements: The next meeting will be on September 8, 2023.

VII. Closed Session:

VIII. Adjournment: With no further business to conduct and no objection, the meeting was adjourned at 10:48 a.m.

Deborah Juran, Secretary

Date

Vice President Administration and Finance Report

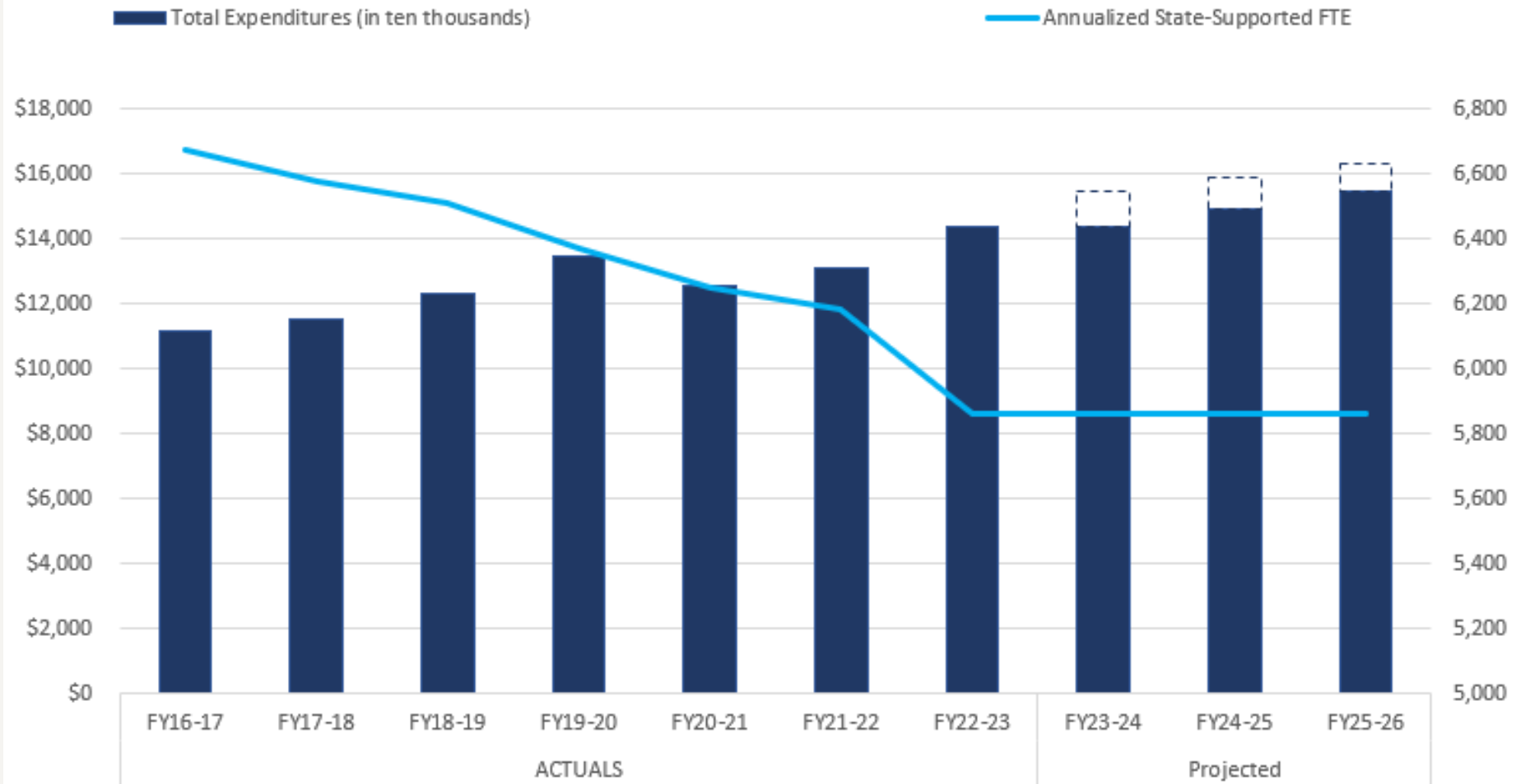
September 2023 Board Meeting



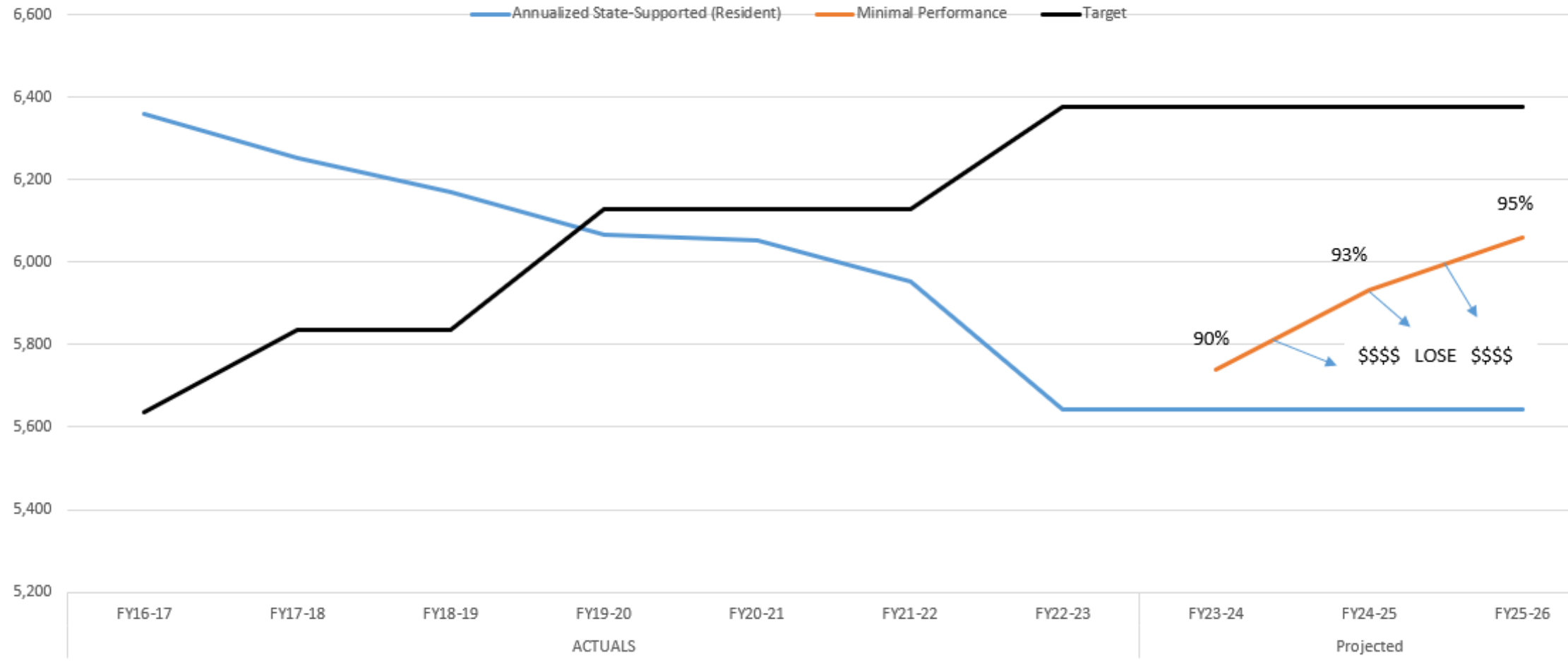
California State University
MONTEREY BAY

Total Expenditures* Rising with Declining Student Enrollment

*MB500 (general fund)



California Resident Enrollment Challenge



FY23-24 Fiscal Reality

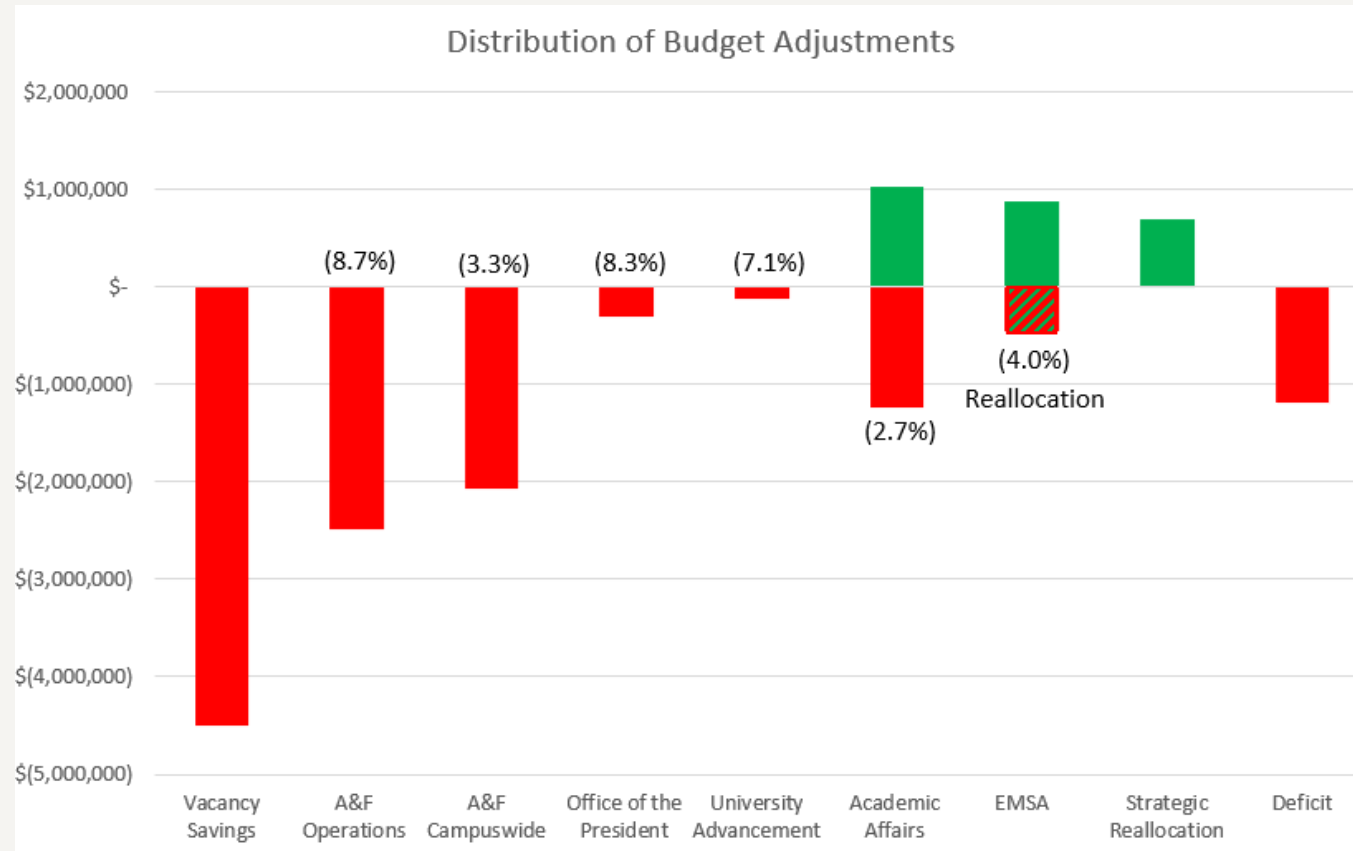
Challenge:

- Prior budgets not aligned with enrollment
- Competing goals
 - Balanced budget
 - Strategic investment
- Deliberate reallocation
 - Invest in enrollment management
 - Preserve academic affairs
 - Reduce overhead

	<u>Original Proposal</u>	<u>Revised Budget</u>
Projected Revenue	\$ 143 M	\$ 143 M
Projected Expenses	<u>\$ 155 M</u>	<u>\$ 144 M</u>
Projected Deficit	(\$ 12 M)	(\$ 1 M)



Invest in Enrollment Management, Preserve Academic Affairs, Reduce Overhead



Opportunities and Risks FY23 Budget

OPPORTUNITIES

- Outperform enrollment target:
 - Undergraduate
 - Graduate
- Increase retention
- Boost nonresident and international interest

RISKS

- Enrollment more than 10% below target
- Inflation prompts salary, supply and utility expenses
- Increased hiring costs
- International visa issues
- Unfunded mandates
- COVID



End



California State University
MONTEREY BAY



CSU Monterey Bay

Campaign Update

September 2023



AGENDA

- 01 CCS Introduction
- 02 Feasibility Study
- 03 Campaign Update
- 04 Next Steps



ABOUT CCS



CSU Bakersfield



CALIFORNIA STATE UNIVERSITY
Stanislaus



UNIVERSITY OF
SAN FRANCISCO

CHANGE THE WORLD FROM HERE



SACRAMENTO
STATE



WESTERN
COLORADO UNIVERSITY



SAN FRANCISCO
STATE UNIVERSITY



METROPOLITAN
STATE UNIVERSITY™
OF DENVER



MONTAGE
Health



Fairfield
UNIVERSITY



HOWARD
UNIVERSITY



UNIVERSITY OF
TEXAS
ARLINGTON



The City
University
of
New York



Salinas Valley
Memorial
Healthcare System

CCS PROJECT TEAM



**Frederic J. "Rick"
Happy
Chairman**



**Theodore
Blackburn
Managing
Director**



**Christina Mathis
Senior Vice
President**



**Lydia LaSalle
Senior Director**

Feasibility Study

OVERVIEW AND METHODOLOGY

In the Spring of 2023, CSUMB partnered with CCS to commence planning efforts in preparation for a potential campaign. CCS conducted 40 interviews and received 657 e-survey responses. The study aimed to address the following:

- **Determining the best path forward for CSUMB**
- **Testing** the preliminary background statement
- **Gathering** valuable advice about potential campaign strategy
- **Determining** fundraising capacity through major gifts
- **Identifying and cultivating** potential campaign leaders and prospective donors
- **Isolating** a challenging yet realistic goal
- **Analyzing** current fundraising strengths, weaknesses, opportunities, and areas of potential

The study tested a \$150 million comprehensive campaign goal in support of the following case elements:

- Enhancing student experiences through capital investments
- Creating classroom-to-career pathways
- Ensuring student success by implementing high-impact learning programs

RECOMMENDATIONS

- Proceed with the planning necessary to launch a campaign with an initial working goal between \$100M-\$120M.
- Implement a six-month initial campaign activation phase to focus on solidifying a campaign plan, cultivating campaign leadership, and refining the case for support to demonstrate impact and need.
- Build staff capacity to focus on deepening current donor relationships, secure lead gifts, and cultivating new donors.
- Ensure campaign leaders, staff, and faculty feel confident and have the knowledge to advocate for the campaign and participate in donor cultivation.



Campaign Update

CASE FOR SUPPORT

Incorporate Study Feedback

- Highlight the personal voices and stories of students and alumni
- Share impact statistics, tangible outcomes, and costs
- Student-centered initiatives tested higher than capital improvements

Case for Support

- Clear and compelling vision of the campaign and its impact
- Focus is on the most exciting, visionary, and philanthropically appealing priorities

- 1 Identify Funding Priorities
- 2 Confirm Funding Priorities
- 3 Craft and Drafting
- 4 Feedback Loop
- 5 Final Written Case
- 6 Material Creation
- 7 Case in Use



CASE KEY MESSAGING

Student Success

CSUMB is committed to providing support services for students to ensure their success while at the university. This includes creating career pathways through academic programs and workforce opportunities.

Economic Impact

By expanding and improving learning environments and investing in innovative programs, CSUMB aims to increase the number of skilled and prepared students to meet regional workforce needs.

Community Building

CSUMB is dedicated to supporting the local community by encouraging graduates to remain in the region and contribute to the economy. We strive to form partnerships that benefit both our students and the community by providing experiential learning opportunities.



KEY INITIATIVES



Enhancing the Student Experience

Provide safe and welcoming environments where every student is valued, supported, and empowered while guiding them toward fulfilling career paths and providing hands-on learning opportunities.

- Success Hub
- Scholars Programs and Internships
- Scholarships (including athletic)



Broaden Academic Opportunities

Expanding and enhancing learning environments, investing in innovative programs, and providing students with a greater array of academic choices, CSUMB aims to increase the number of skilled and prepared students to meet regional workforce needs.

- Greenhouse and Research Farm
- Marine Sciences
- Health Sciences Programs
- Performing Arts
- Endowed Chair and Faculty Positions

THE BOARD'S ROLE IN THE CAMPAIGN

Communicate philanthropy's role in advancing CSUMB's mission

Open doors and make introductions

Recommend supporters and prospective donors

Make a personally meaningful gift to the campaign and ask others to "join me"

Feedback and input on campaign marketing materials and collateral

Participate in events, meetings, and be a public advocate for CSUMB

NEXT STEPS

Case for Support

- Feedback loop
- Finalize written case
- Branding and design

Donor Engagement Tools

- Case for Support for each college, athletics, and student success
- Templates, guides, and FAQs





Thank You!

100 Campus Center ~~~ Seaside, CA ~~~ 93955-8001

Memorandum

TO: Investment Committee

VIA: Gifford Lehman, Chair

FROM: Nancy Ayala

DATE: September 5, 2023

SUBJECT: V. Reports, E. Investment Committee Report Memo

The Auxiliary Investment Committee members:

Gifford Lehman, Chair, Members: Barbara Zappas, Brian Corley, Michal-Anne Miller

Investment Consultant: Verus Advisory Inc.

The Committee met on June 16, 2023. Verus reviewed Capital Market Assumption and Asset Allocation and presented private credit and real estate recommendations. Verus reviewed the target allocation expectations to ensure they align with the portfolio's goals and annual revisions to Capital Market Assumptions. Verus noted the risk tolerance in the portfolio is the same as it has been. The expected return for the portfolio is 7.3% and 6.2%. Verus does not recommend any changes to the current strategic asset allocations of the portfolio. The Committee discussed the possibility of adding more risk to the endowment portfolio to receive a greater return and requested that Verus return with riskier options for review. Verus does not recommend any changes to the current strategic asset allocations of the portfolio.

Verus presented a private credit manager, Davidson Kempner manager. The endowment's current strategic asset allocation includes a 15% target to private credit. At the end of March, the allocation to private credit was 12.4%, just below the 15% target. The Committee approved a \$2M investment to Davidson Kempner's Opportunities Fund VI.

Committee discussed terminating or redeeming ASB. The Committee raised concerns about not knowing what these funds sell for, which could result in a significant loss since the manager is undergoing redemption requests. Verus will return with more information on current activities with the fund, liquidity terms, and gating information.

The Committee reviewed the contract with Verus, which was set to expire on June 30, 2023. The Committee decided to renew the agreement for one year and issue a request for proposal in the fall. The Committee is satisfied with Verus' services; however, since the firm has been managing the auxiliaries' investments since 2005, the Committee felt it was its due diligence to solicit other consulting firms.

The Committee met on August 16, 2023. Verus presented two potential managers to replace Dodge & Cox in the International Value Equity space to improve portfolio sustainability metrics with DFA or Calvert. International value equities are typically one of the least environmentally friendly asset classes. Verus recommends replacing the Dodge & Cox International Equity Fund (DODFX) and a portion of the DFA Emerging Markets Value (DFEVX) with the DFA International Sustainability Fund (DFSPX) because

the lower cost option at a fee of just 25bps. Calvert charges 89bps. The Committee approved a \$1M investment to DFA, with 50% of the funds to be taken from Dodge and Cox and the other 50% from the Schwab Index Fund.

Verus presented the recommendation to invest in TA Realty's Fund XIII, a value-add real estate strategy that Verus has very high conviction given the current real estate market. The Committee approved to invest \$1M in TA Realty as presented.

The Committee met on September 5, 2023. Foundation Board member Robert Behl attended this meeting. Verus presented opportunistic real estate recommendation Cerberus Institutional Real Estate Partners VI. Verus provided a satisfactory due diligence report to the Committee. The Committee approved a \$2M commitment to this fund. This meeting was held instead of the November meeting to ensure the Committee would meet the manager's deadline of November 30, 2023. Verus updated the Committee on ASB Realty and noted that the manager has about 12% in the redemption queue and will take several quarters to pay if we decide to enter the redemptions queue. More information will be available net year.

The Committee will meet again in February 2023. These meetings are open to the public.

Branding and Marketing Evaluation Project Update

Aaron C. Bryant, PhD

University Communications



California State University
MONTEREY BAY

Curating and Honoring the Brand

- Establishing a clear and compelling brand for the university, centered on what makes Cal State Monterey Bay special and different from other choices in Higher Education institutions. Crystalize that story to build affinity for us as a premier university in the central coast of California, that positively impacts our region, state, and beyond.
- Maintain the university brand identity to assure our audience knows who we are and how we are affiliated with all we do — protecting our reputation and our good name in our community.



Brand and Marketing Evaluation

- **RFP - Nationwide search for a brand marketing partner last spring**
 - Contract awarded to Red Cactus of Tucson, AZ
 - Firm specializing in university brand identity and advertising.
- **Phase 1 – Research and Foundation - Complete**
- **Phase 2 – Branding and Messaging Development - In progress**
- **Phase 3 – Strategic Brand Implementation & Community Engagement**
- **Phase 4 – Comprehensive Marketing and Advertising Plan Recommendation**



Phase 1 – Research and Foundation

- **Qualitative Research**
 - 11 on-campus focus groups (83 people)
 - 11 online focus groups (57 people)
 - Included: students, faculty, staff, alumni, business and community leaders, coaches, parents, graduate students, donors and supporters
- **What Makes CSUMB Special?**
 - Conversations with the campus community emphasized CSUMB's personalized education, inspiring coastal location, and commitment to fostering a welcoming and supportive community where students make connections and thrive.



Phase 1 – Research and Foundation

- **Quantitative Research**
 - Current students (500)
 - Current parents (308)
 - Faculty and staff (315)
 - Alumni survey (178)
 - Prospective students and parents (538)
 - Community survey (1,018 in California target markets)
- **Explored CSUMB's strengths, weaknesses, and points of distinction**



Familiarity with schools: Top-of-mind mentions

Q. What colleges or universities in California's Central Coast are you aware of?

N=1,813 responses. Multiple responses are allowed. Schools with 2%+ mentions.

School Name	N	% of All N=1,813	Group 1 N=620	Group 2 N=355	Group 3 N=506	Group 4 N=332
UCLA	149	8%	2%	6%	16%	11%
CSU Monterey Bay	148	8%	19%	5%	2%	2%
UC Santa Cruz	146	8%	16%	3%	3%	5%
UC Santa Barbara	117	6%	2%	5%	11%	10%
UC Berkeley	90	5%	2%	8%	5%	8%
University of Southern California	81	4%	1%	2%	11%	4%
Monterey Peninsula College	77	4%	12%	<1%	-	1%
Hartnell College	72	4%	11%	<1%	-	<1%
California Polytechnic State University	70	4%	3%	6%	3%	5%
Stanford University	67	4%	2%	8%	3%	4%
Cabrillo College	64	4%	10%	1%	-	-
CSU Fresno	56	3%	1%	9%	2%	2%
CSU San Jose	45	2%	3%	5%	1%	1%
UC Davis	42	2%	1%	3%	3%	3%
Cal Poly San Luis Obispo	37	2%	1%	3%	4%	4%
UC Merced	31	2%	1%	4%	1%	2%

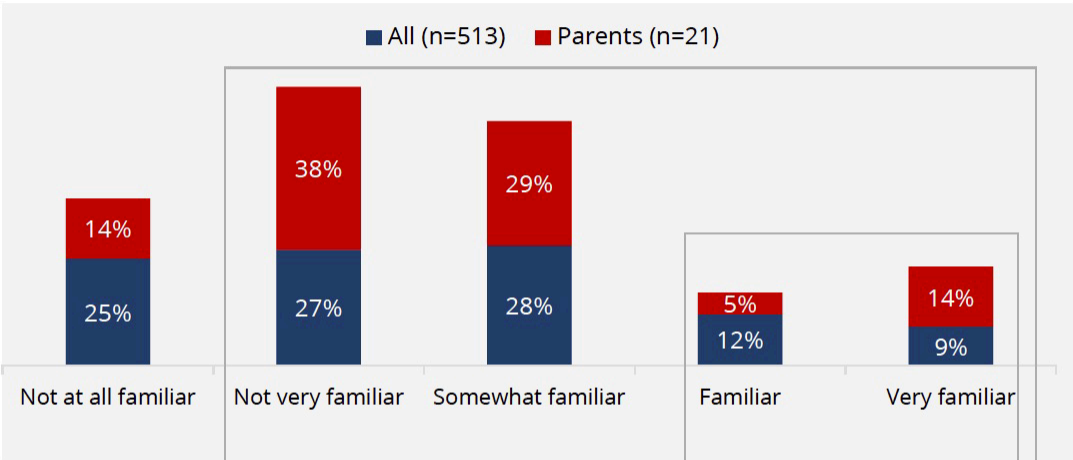
Group 1: Monterey, Santa Cruz, San Benito; **Group 2:** Santa Clara, San Mateo, Alameda, Fresno, Merced;

Group 3: Los Angeles, Orange, San Diego; **Group 4:** Other CA counties

Familiarity with and Perception of CSUMB

Q. How familiar are you with California State University, Monterey Bay (CSUMB)? N=513

Q. What is your overall opinion of CSUMB? N=306



FAVORABLE 54%
(top2box)

FAVORABLE 80%
(top2box)

Familiarity correlates with favorability.

Brand and Marketing - Next Steps

- **Phase 2**

- Aug. 30 to Sep. 7 - Brand Promise message check
- Starting week of Oct. 9 – online and on-campus focus groups
 - Updated logo and draft message concepts testing

- **Phase 3**

- Starting week of Oct. 30 – online workshops to develop a three-year rollout plan
- Mid-November Town Hall – announce adjusted brand identity

- **Phase 4**

- Nov. to Jan. – Comprehensive plan



Questions

Aaron C. Bryant, PhD

University Communications



California State University
MONTEREY BAY