California State University, Long Beach
Campus Corporate Partnership Program

December 4, 2019
Executive Summary

The California State University, Long Beach (CSULB) is exploring how to expand, diversify and sustain revenue beyond state support, and student tuition and fees. Corporate partnerships are one of several strategies under consideration.

The CSU System engaged the Project Team (collectively ADC Partners and The Superlative Group), agencies with extensive corporate partnership and higher education experience, to determine the feasibility and revenue potential associated with implementing a comprehensive campus corporate partnership program.

Corporate partnerships are defined as marketing-driven relationship between a campus and a business that has a mutually understood and cooperatively achieved outcome. In an optimal partnership, the business obtains access to campus spending (dedicated business) and opportunities to engage affiliated populations (indirect business) in exchange for revenue in the form of fees, incentives and access to goods/services. Terms are most often five years or longer; revenue varies widely depending on the industry and scale of the partnership.

During our discovery meetings, we heard some concern among stakeholders on campus, most notably in relation to Social Justice and the commercialization of campus. Since then, Long Beach State has done an exemplary job with socializing the idea of campus partnerships. Combined with the growth and sophistication of campus partnerships as a whole and CSU system support, CSULB is positioned to secure new revenue from marketing-based corporate partnerships.

Corporate partnerships are constructed using the array of marketing and communication assets that exist on campus. By combining assets from a variety of campus stakeholders including Student Affairs, Alumni and Development, Athletics and others into a single partnership platform that addresses the marketing and business development needs of a potential partner, CSULB can successfully tap into budgets at companies that may have previously not been accessed.

While aggregating marketing and communications assets is important, a key to this success will be leveraging campus spending. By incorporating a campus partnership requirement into Request for Proposals for select business categories, Long Beach State can secure new revenue from existing and new business partners. This technique has been used to great effect by schools targeting soft drink, banking, coffee and other high value categories.

Identifying the revenue potential of a corporate partnership initiative relies on making several assumptions around categories of business to be pursued, breadth of assets available, and more. If CSULB embraces a comprehensive campus-wide corporate partnership program it is reasonable to assume the University could generate high six to low seven-figures in new annual revenues by year five of the partnership program.

It is important to note that the CSULB will need to implement governance, systems and processes required to support a corporate partnership program. Among these is assigning roles to faculty and staff responsible for fulfilling contractual obligations of partners. Additionally, as campus partnerships grow and more partners are acquired, Long Beach State may seek to dedicate one or more people to the development and activation of the program.

While there several challenges that need to be addressed, it is recommended that Long Beach State move forward with implementation of a corporate partnership program.
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1.0 Background

1.1 Project Objectives

Universities and colleges are facing unprecedented pressure to improve financial performance and generate new revenue streams. To do so, many schools, including California State University, Long Beach (CSULB) are considering expansion of corporate partnership initiatives beyond their traditional association with athletics.

To fully realize the benefits associated with corporate partnerships (while simultaneously avoiding potential pitfalls), this process requires industry and market expertise currently not in place at the University. As a result, CSULB retained the Project Team to help identify and value assets which might be included in major campus partnerships.

Based on preliminary conversations with Long Beach State leadership, the Project Team has identified the following objectives for this project:

- Create structure and roadmap for program which generates new corporate partnership revenues.
- Identify assets that merit inclusion in an integrated, comprehensive partnership program.
- Propose assets that could be incorporated into a partnership program.
- Establish market-relevant values for recommended partnership assets.
- Provide outline of a fully integrated partnership program for Long Beach State.
- Provide Long Beach State with a comprehensive report outlining key findings.

1.2 Project Team

The CSUC Campus Corporate Partnership Program is led by the Project Team is comprised of ADC Partners, LLC, a San Francisco Bay Area-based agency founded in 2002 and The Superlative Group, a Midwest-based agency founded in 1994.

1.2.1 ADC Partners

ADC Partners maintains two areas of expertise:

- Property Consulting: Support the business operations of sports, entertainment, and public sector organizations, with special expertise in partnership program development and execution.
- Marketing Consulting: Support the marketing and sales objectives of corporations by developing and executing strategic partnership programs.

ADC has special expertise working with universities and colleges in a variety of capacities, including partnership program design and development, multimedia rights negotiation, athletic department staff training, and more.

ADC’s current and past university clients include:

- California State University System
- Fresno State University
- Rutgers University
- San Diego State University
1.2.2 The Superlative Group

The Superlative Group is a leading expert in corporate Partnerships & Naming Rights Valuation & Sales. Its proven approach has been used throughout the US, Canada and Europe to identify and secure significant revenue streams.

The Superlative Group maintains areas of expertise:

- Commercial Sponsorship Management
- Collegiate Partnerships
- Municipal Marketing
- Single Source Pouring Rights

TSG has extensive experience in the university and collegiate space including the negotiation of naming rights for academic and athletic facilities, campus-wide corporate partnerships and pouring rights contracts.

Current and past university clients include:

- University of California, Davis
- University of California, San Diego
- California Baptist University
- University of Cincinnati
- United States Air Force Academy
- Xavier University
- Kent State University
- University of North Carolina, Charlotte
- Cleveland State University
- Cuyahoga Community College
- Trinity College, Dublin
- National University of Ireland, Galway

1.3 Project Leadership

ADC Partners is led by two principals who execute all project work: Andy Dallin and David Almy. The Superlative Group staff engaged on this project includes Myles Gallagher, President & CEO, Kyle Canter, COO, and Andrew Shessler, VP of Valuation & Analytics.

1.3.1 David Almy

Mr. Almy has more than 25 years’ experience advising corporate clients and sports businesses, and provides an extensive expertise in developing, activating, and measuring sponsorship marketing strategies.

He has managed successful sponsorship programs for corporate clients ranging from large multinationals to small regionally focused businesses including 24 Hour Fitness, AAA, Banner Health, the California Milk Advisory Board, Clorox, IMG, Kaiser Permanente, Reuters and others.
By maintaining an unerring focus on client objectives, Dave’s work has resulted in numerous accolades, including the American Business Awards, PR Newswire Award for Marketing and others.

1.3.2 Andrew Shessler

Andy Shessler brings 15 years of experience in managing and valuating brand marketing and sponsorship portfolios for Fortune 500 clients, major events and professional sports organizations. The experience includes valuations for the San Francisco 49ers, Ford Motor Company and United Airlines.

Before joining The Superlative Group, Andy worked at Paragon Marketing Group. While at Paragon, Andy was the main contact for major client partnerships including the PGA Tour, Cleveland Indians, Cleveland Browns, Houston Texans, New York Red Bulls and Houston Dynamo.

Andy manages these relationships and campaigns from beginning to end including program development, content creation, contract negotiation, on-site event management and result analytics. Andy has led successful valuation campaigns, finding the true value of partnerships for university clients such as Trinity College Dublin and the University of North Carolina - Charlotte.
2.0 Methodology

2.1 Meetings with Campus Stakeholders

Campus Administration and Finance
- Scott Apel, Chief Financial Officer;
- Mishelle Laws, AVP, Administrative Services;
- Berta Hanson, Administrative Assistant;
- Tracey Richardson, AVP, Financial Management;
- Ted Kadowaki, AVP, Budget & University Services;
- Malia Freund, Director, Procurement & Contractual Services;

Information Technology
- Min Yao, Chief Information Officer;
- Janet Foster, AVP ITS;

Athletics
- Andy Fee, Director of Athletics;
- Cindy Masner, Deputy Athletics Director / SWA;
- Mark Edrington, Sr. Associate Athletics Director – Capital Enhancements, Facilities, Operations and Event Management;

49er Shops
- Don Penrod, CEO;
- Clint Campbell, Contract Administrator, Facilities Manager;
- Jared Ceja, Director of Bookstore Services;

University Relations & Development
- Michele Cesca, VP, URD;
- Jeff Cook, AVP, Strategic Communications;
- Kevin Crowe, AVP, URD;
- Christopher Reese, AVP, Advancement & Government Relations;

University Library
- Roman Kochan, Dean & Director, University Library;
- Christiane Beyer, Professor, Dept. of Mechanical and Aerospace Engineering

Student Affairs
- Mary Ann Takemoto, Vice President, Student Affairs;

Associated Students, Inc.
- Sylvana Cicero, Director, USU & SRWC.

Carpenter Performing Arts Center
- Megan Kline Crockett, Executive Director
2.2 Partnership Asset Surveys

Following initial meetings, designated people inside each department were sent “CSULB Inventory Request” surveys.

The CSULB Inventory Request Surveys are six short surveys designed to collect specific information regarding the different assets each department can leverage in support of a campus partnership program.

Each survey concentrates on a specific asset category area, including:

- Websites
- Social Media
- Mailing lists
- Events
- Sponsorship and Advertising
- Facilities

Findings from these surveys were used as the basis for the “Asset Identification and Valuation Section.” Examples of the surveys follow on the next page.

2.2.1 Partnership Asset Survey Examples

![Survey Examples](image)

2.3 Resources

**External Resources**
- 2010 United States census
- Scarborough Research
- Nielsen Media Measurement
- Wells Fargo Securities
- Salesforce Marketing
- Worlddata Research
- CSU Factbook 2018

**Internal Resources**
- Discovery meeting data
- 49er Shops spending reports
- Project survey Responses
- CSULB Finance Annual Reports
- CSULB Associated Students documents and reports
- CSULB Alumni Association documents
- CSU's CalUSource reports
3.0 Recommended Approach and Benchmarks

3.1 Recommended Approach

There are three potential courses of action for developing campus partnerships:

- **Direct Approach**: CSULB identifies categories of business interested in reaching one or more campus populations. A partnership program is created that includes assets/entitlements designed to reach and impact these target populations.
- **RFP Approach**: CSULB identifies areas of “significant” campus spending. Working with procurement, these categories of spending are tied to participation/investment in the campus partnership program. An RFP process is the most common method of soliciting participation.
- **Joint Purchasing Agreement (IPA)**: Another public university amends a competitively-bid partner contract to allow CSULB to benefit from partnership services. This is a relatively new and less common approach to university partnerships.

Each approach has strengths and challenges:

**Direct Approach: Strengths**

- Most common approach to partnerships, so there is broad familiarity among corporate marketers.
- Many businesses and marketers are set-up to support partnership development efforts of this type.
- A simpler approach as it doesn’t require integration of procurement.

**Direct Approach: Challenges**

- Revenue potential is limited.
- Difficult to prove economic impact to partners, leading to high turnover.
- Deals tend to be short term in nature (i.e. no more than 3 years).

**RFP Approach: Strengths**

- Expands pool of possible business categories beyond those that would typically sponsor a college or university.
- Process driven approach, likely involving procurement, fits well with the University setting.
- Transparent process that invites external evaluation.
- Partnerships are linked to campus business, providing a compelling rationale for potential sponsors.
- Partnerships tend to be more long term (i.e. a minimum of 3 years).

**RFP Approach: Weaknesses**

- Because RFP Approach is more process driven (i.e. integrates purchasing/procurement), can be slower to get to deals.
- Process can be more rigid, as it abides by procurement guidelines.
- Requires more effort/coordination from vendors to support the partnership requirements.
JPA Approach: Strengths

- Expedites solicitation process by allowing a university to benefit from a previous RFP approach from a peer institution.
- Encourages collaboration and trust between public university procurement departments.
- Process driven approach, likely involving procurement, fits well with the University setting.
- Partnerships are linked to campus business, providing a compelling rationale for potential partners.
- Partnerships tend to be more long term (i.e. a minimum of 3 years).

JPA Approach: Weaknesses

- The JPA Approach is only viable if solicitation requirements for the partner universities are identical.
- Partner services for both universities are limited to the original scope of the public solicitation and supplier contract.
- Requires more effort/coordination from vendors to support the partnership requirements.

Based on the strengths and challenges presented by each approach, it is recommended that CSULB should pursue an RFP approach.

- Leverages campus spending to drive greater partner participation.
- Significantly expands the number of business categories beyond traditional college partners.
- Encourages and promotes transparency to offset any lingering concerns over previous campus partnerships.
- Avoids potential conflicts with other campus groups actively soliciting partnerships (direct model).
- Increases program revenue potential.

This is not to suggest that a direct approach to partnership development should be abandoned altogether. To the contrary, there will always be opportunities for direct partner development, as with the case of Naming Rights. A Direct Approach may still produce revenue, but for the reasons illustrated above, it should not be the focus of the CSULB campus partnership program.

3.2 Benchmarks

Corporate partnerships involving universities are common. Multiple campus departments are currently engaged in developing and implementing partnerships, including athletics, alumni and development, student affairs and others.

What is far less common, however, is the practice of coordinating corporate partnership activity across an entire campus to create singular, unique partnership programs. While campus partnership programs (also referred to as total campus partnerships) are rarer, they are becoming more common as universities seek to leverage their buying power to generate additional revenue.

Examples of effective, regionally relevant campus partnerships are included below as a reference points.
3.2.1 Fresno State University and Pepsi-Cola

- $40,000,000 over 20 Years.
- Partnership includes (but is not limited to) the following assets:
  - Naming Rights to New Event Center
    - Rights transferred (known as “pass through”) to SaveMart Supermarkets.
  - Business Development
    - Pouring rights on campus.
    - Salty snack category (Frito-Lay subsidiary).
    - QSR category opportunity (Yum! Brands subsidiary).
  - Promotional
    - Preferred placements in SaveMart Supermarkets.
  - Sports Marketing
    - Extensive sports marketing rights through Bulldog athletics.

3.2.2 San Diego State and Viejas Casino

- $6 million over 10 Years.
- Partnership includes (but is not limited to) the following assets:
  - Naming Rights
    - Facility naming for on campus arena.
    - Ancillary benefits associated with visibility (e.g. way finding signage).
  - Scholarships
    - Underwriting scholarships for Native American students.
  - Co-Curricular / Programming
    - Content and resources for American Indian Studies.
    - Elymash Yuuchaap Indigenous Scholars and Leaders Program.
  - Sports Marketing
    - Comprehensive sponsorship of Aztec athletics.

3.2.3 UC Berkeley and Peets Coffee

- 10 Years, $8 million.
- Partnership includes (but is not limited to) the following assets:
  - Business Development
    - Expanded service in campus dining halls and coffee bars.
    - New full-service cart at Recreational Center.
  - Programmatic
    - Support of basic needs skills academic course from the Centers for Educational Equality and Excellence that teaches personal budgeting, food preparation and wellness strategies.
    - Support of student-led Sustainability@Cal, which is focused on reducing the environmental footprint of campus buildings.
  - Student Initiatives
    - Commitment to hire Cal grads through the UC Berkeley Career Center.
    - Provide annual need-based scholarships and paid internships across multiple disciplines.
    - Funding for graduate student travel grants through the Graduate Assembly.
  - Sports Marketing
    - Comprehensive Cal athletics sponsorship.
3.2.4 UC Davis and US Bank

- 10 Years, $1.3 million guaranteed, additional $3.0 million in incentives.
- Partnership includes (but is not limited to) the following assets:
  - Business Development
    - On-campus branch in Memorial Union.
    - Seven on-campus ATM locations.
    - Provide Campus One Card.
  - Events
    - Financial literacy seminar at freshman orientation.
  - Campus Activity Fund
    - Underwrite fund for student groups to access.
  - Awareness
    - Signage and Displays in key campus locations including:
      - Memorial Union
      - Activity and Recreation Complex
      - Pavilion
  - Sports Marketing
    - Comprehensive UC Davis athletics sponsorship.

3.2.5 University of Washington and Alaska Airlines

- $41 million over 10 years.
- Partnership includes (but is not limited to) the following assets:
  - Naming Rights
    - Feature naming at Husky Stadium (Alaska Airlines Field at Husky Stadium).
    - Extended naming rights to Alaska Airlines Arena at Hec Edmundson Pavilion.
  - Scholarships
    - 50% of revenue earmarked for college scholarships and “student welfare.”
  - Business Development
    - Discounted rates for fans travelling to see Husky football games.
  - On Campus Programming
    - Presenting sponsor of Parent and Family Weekend.
    - Supports Foster Schools Environmental Challenge.
    - Platinum partner of Office of Minority Affairs and Diversity.

3.2.6 CSU Northridge and Dignity Health

- $710,000 over 2 Years.
- Partnership includes (but is not limited to) the following assets:
  - Designation
    - Community Health Partner of the CSULB Matadors.
  - Advertising
    - 250 :30 spots on KCSN.
    - Full page ad in Soraya program.
  - Promotional
    - 10,000 branded H2O water bottles for Freshmen signing up for Student Rec.
    - 3,000 co-branded drink tumblers at Soraya.
  - Digital
- Two (2) dedicated email blasts to 350K CSULB alumni.
  - Awareness
    o Digital Logos at Soraya Performing Arts Center.
    o 3’ x 8’ banner at University Student Union for 2 months per year.
  - Sports Marketing
    o Comprehensive CSULB athletics sponsorship.

Each of these partnerships presents key insights into how to extract maximum value from a corporate partner:

- Leveraging spending produces more revenue.
- Majority of partnership programming comes from existing campus activity (events, programs, etc.).
- Practical examples of business development (e.g. on campus sales locations, pouring rights, etc.) are highly valued.
- Integrating partnership assets from multiple campus departments increases perceived value by creating efficiencies for the partner.
- There is benefit to partnering with programs and activities that mirror corporate objectives (sustainability, etc.).
4.0 Current Environment

4.1 Campus Receptivity
With the administration’s efforts to introduce and socialize campus partnership programs, interactions across the campus were generally typified by openness to embracing the concept. Concerns about commercializing the campus were rarely voiced and are not seen as an obstacle to pursuing a broad corporate partnership initiative. Further, given continuing budget pressures at CSULB, faculty and staff recognize that funds and resources from potential corporate partners represent an opportunity to generate new revenue and support services.

A few CSULB departments and areas are currently pursuing corporate partnerships (often referred to during our meetings as sponsorships) to support initiatives and programs. Additionally, these existing partnerships help establish a solid precedent for multiple departments working in concert. As a more comprehensive campus partnership program will simply build upon these established precedents, impediments to implementation appear to be modest.

4.2 Precedent
As revealed in Section 3.2 Benchmarks, the number of campuses pursuing broader partnerships with corporations is expanding. Several University of California campuses (Berkeley and Davis) have departments dedicated to developing corporate partnerships, and others (San Diego) will soon follow suit.

As a result, more businesses are adapting to campus seeking partnerships. Traditional categories such as soft drink are joined with newer entrants into the market including coffee, financial services, healthcare, express/overnight shipping and others.

4.3 Macroeconomic Factors
The US economy is continuing its unprecedented run of growth. While concerns about a recession are becoming more common, the majority of economic forecasts project continued (though more subdued) expansion.

According to the Conference Board, a 501 non-profit business membership and research group that features over 1,200 public and private companies:

- “The economy is set to enjoy solid though not spectacular performance this year.”
- “Overall 2019 data so far point to more challenging business conditions than 2018.”
- “Consumers remain optimistic thanks to low unemployment and fast wage growth, but their level of optimism has dimmed since October.”

During this boom cycle of the US economy, corporate marketing expenditures have been robust and continue to grow. PriceWaterhouseCooper anticipates 4.4% compound annual growth for advertising expenditures for 2018 – 2022. Anticipated growth of various marketing channels is highlighted on the following page in Figure 1.
If the economy slows significantly, however, this growth could slow dramatically, as marketing expenditures are among the first cuts corporations make to protect budgets.

With proper communications efforts led by the CSULB administration to socialize the idea of any future campus-wide corporate relationships, CSULB is well positioned to implement a campus partnership program. A strong US economy, combined with anticipated continued growth of corporate marketing and advertising expenditures, indicates that resources required for campus investment will be available.

Figure 1: Projected growth of marketing channels, 2018-2022

4.4 Trends in Higher Education

In 2019, the American Council on Education (ACE) published a TIAA Institute-sponsored report entitled “Too Important to Fail, Too Big to Be Complacent: An Analysis of Higher Education Market Risks and Stressors”. The report asserts that nonprofit, public universities “are not businesses, but they are enterprises subject to the shifting currents of a consolidating market in which the rich are getting richer and the big are getting bigger”, leading to what ACE believes will be a certain future where wealthy universities will be able to maintain their current growth rate while a small percentage of universities faces closure.

In particular, public universities are being impacted by state governments that have decreased or completely eliminated state appropriations due to legislative deadlocks. In greater scale, nearly half of Americans surveyed by ACE believe a college degree is less economically valuable than it used to be, making the value proposition for public universities that much more challenging. Without alternative funding sources, the ACE report concludes that industry-wide, universities will need to choose between increasing student tuition fees to offset declining enrollment and decreasing their price points, enrollment and budget in order to survive.

This trend is also the result of a highly competitive environment. According to Moody’s Investors Service, “[a]mid a continued societal focus on value and return on investment, universities are competing for an overall flat number of high school graduates and declining high school graduates in certain regions.” EAB, a higher education research firm, validates these findings. A recent EAB
presentation titled “State of the Union: Redefining Leadership in the Face of Market and Mission Shifts”, found that post-Great Recession, thirty-six (36) states will see slower growth or declines in number of high school graduates between 2016 and 2031.

Generally, the higher education market is worsening faster than universities can adapt, leading to missed enrollment goals, disappointing new programs or new programs not being implemented quickly enough in an emerging market too expensive to serve. Increased price sensitivity led to 69 percent (69%) of families in 2017 eliminating certain institutions from consideration due to cost. According to an unnamed top-tier research university president quoted by EAB, universities “are not going to go out of business”, but their current financial model will not allow them to maintain excellence, serve their communities nor meet their ambitions. Long-term, universities need to explore alternative models for financing their futures.

The following figure depicts the national “enrollment cliff” forecast, or change in students attending four-year colleges from 2012 through 2029. Only nine of 50 states (18%) show signs of positive growth.

*Figure 2: Change in Students Attending Four-year Colleges (2012-2029)*
Further, for public universities, state support for higher education increased by an average of 1.6 percent (1.6%) from 2017 to 2018, the slowest growth rate in five years. Please refer to the figure below.

Figure 3: Growth in State Funding (2017-2018)

The good news is that increased competition is leading students to apply to more colleges and universities than ever before, according to the National Association for College Admission Counseling. In September 2019, the NACAC reported that 35 percent of college freshmen applied to seven or more institutions in 2016, up from nine percent in 1990. Eight of the top 10 universities with the most applications are located in California, including Cal State Long Beach. Overall, California leads the nation in college applications, student enrollment and increases in state funding, further supporting the future strength of the local marketplace and creating an environment at CSULB conducive to public-private partnerships.
5.0 Operational Guidelines

To promote success of a campus partnership program at CSULB, there are a number of recommended principles and guidelines to consider.

5.1 Partnership Revenue is Distinct from Revenue Derived from Advertising and Donations

CSULB is seeking to create corporate partnerships that can produce incremental revenue. This is a key point of distinction, as corporate partnerships are different from both advertising and donations.

- **Partnerships**: A long term, marketing-based partnership between a property and business based on a mutually agreed upon exchange of value. Both the business and the property are equally vested in the partnership outcome. On the part of the business, there is an expectation of a return-on-investment. Typically comes from marketing and business development budgets.

- **Advertising**: A business rents space or time on different media channels (radio, out-of-home, etc.) from a property for a short period of time. During that time, the business shares messages designed to influence affiliated populations. As with partnerships, there is an expectation of return-on-investment, and funding typically comes from marketing budgets.

- **Donations**: A business contributes funds to a property as a gift. Beyond positively positioning the business before the property and affiliated communities, there are few concrete business objectives for the donations. Generally speaking, there is no expectation of return-on-investment. Typically comes from foundation or community affairs budgets.

This final distinction is particularly important, as the majority of universities (CSULB included) has an Advancement arm that is charged with generating gifts from businesses. While a campus partnership program and development efforts target different budgets from within a company (marketing/business development vs. foundations/public affairs), close coordination between these two groups is essential to avoid conflicting messages and outreach.

Further, while Partnerships, Advertising and Donations present fundamentally distinct ways to generate revenue, each can present integration opportunities. For example, part of a corporate partnership may include both donations to advancement and access to campus advertising inventory.

5.2 Leveraging Spending Is Essential to Maximizing Revenue

Generating value from marketing partnerships centers on providing a potential partner with two distinct economic opportunities:

- **Guaranteed Revenue**: Revenue that directly results from and is tied to the partnership.

- **Potential Revenue**: Revenue that can be generated from the partnership via marketing programs.
In the case of the CSULB, guaranteed revenue comes from leveraging and integrating CSULB spending into a campus corporate partnership program (as defined in section 3.1 Recommended Approach). Potential revenue would come from the different marketing programs (athletics signage, on-campus events, etc.) that give a partner unique access to CSULB populations stakeholders and audiences.

As corporate marketers seek to minimize risk when considering new or unfamiliar programs, providing guaranteed revenue as part of a corporate partnership platform is essential to generating the maximum possible investment from partners.

5.3 Incentivizing Philanthropic Giving in Support of Partnerships

A common topic of debate at colleges and universities is whether or not Partnerships, as defined in section 5.1, can include Donations and other forms of philanthropic giving to advancement when leveraging university spending as part of a Partnership could provide a not insubstantial benefit—the IRS standard for determining whether funding is considered unrelated business income—to the partner.

In order to certify that all CSULB interests and those of its students are represented in a formal Partnership solicitation and successfully incorporate philanthropic funding, CSULB should encourage partner investment against its core values as a university, and state preference toward partners who do so. Developing revenue streams around university values clarifies CSULB’s preference for holistic partnerships without demanding philanthropic funding in exchange for university business, while also justifying to the CSULB community that partner objectives are not wholly business-driven.

As a result, many Partnerships across the country include scholarship funding, donations, paid internships and other value to universities that also provides a tax incentive for the partner. However, these funding sources must be separate and distinct from Partnership revenue, for which an exchange of tangible and intangible benefit is expected and allowed between parties.

5.4 Program Governance

Successful campus partnership programs rely on the participation of multiple campus constituencies including (but not necessarily limited to) athletics, alumni and advancement, campus corporations and auxiliaries, student affairs, performing arts and more. As these groups often have different (and occasionally competing) interests, clear governance and organizational design for a campus partnership program is essential.

Administration and Finance should play a central role in managing a campus partnership program, with overall program oversight falling on the campus VP Admin & Finance. Reasons for this include:
• Reporting Structure: Several of the participating departments and areas have direct or dotted-line reporting to the VP Admin & Finance.
• Capabilities: the VP Admin & Finance’s office maintains oversight and management of an array of related functions and services including contracts, financial services, facilities, risk management, etc.
• RFP Governance: The campus partnership program will make thorough use of the RFP process, which also falls under the VP Admin & Finance’s office.

Both Advancement and 49er Shops should play an active role in the successful implementation of the campus partnership program.

• Both groups (especially 49ers Shops) have experience managing contracts, facilities and overall skills helping with program operations.
• Advancement’s experience supporting corporate partners and donors brings essential relationship management expertise.

As a result, both departments integration into the day-to-day management of a campus partnership program should be considered essential.

5.5 Allocate Resources and Systems for Program Implementation

In the early stages of program implementation, existing campus resources can manage implementation (as described in the previous section).

As the program grows, however, activation and fulfillment will become increasingly complex and time consuming. As lack of implementation resources and dissatisfied partners are the primary reasons why corporate partnerships fail, CSULB should follow the lead of other schools with active campus partnership programs and develop resources specifically responsible for implementing partnerships. This should include dedicated staff responsible for partner activation and fulfillment.

Relevant examples of staffing structure can be found with UC Berkeley’s University Partnership Program (see Figure 1 on the following page) and UC Davis’ University Preferred Partnership Program.
5.6 Create an Iterative Process for Integrating Assets into the Partnership Program

The potential partnership assets identified and valued in this report should not be seen as a definitive list. CSULB is a vibrant community of people always seeking new ways to expand the mission of the University. This produces new activities, events and programming on a regular basis.

Moreover, CSULB will need to work closely with partners to ensure that their programs remain vibrant and relevant to their marketing and business development interests. As individual partnerships will ideally feature terms lasting longer than 5 years, it is strongly recommended that CSULB continue to integrate assets that may not be part of original findings.

New assets can also provide opportunities to amplify revenue opportunities beyond what was negotiated in the original terms through upselling.

5.7 Clearly Define Use of Corporate Partnership Revenue

Ambiguity regarding use of revenue derived from corporate partnerships decreases willingness to participate in related programs. As a result, CSULB should be as specific as possible in detailing how partnership revenue will be distributed.
Ideally, partnership revenue will be used to:

- Provide both tangible and intangible benefits for participating departments.
- Provide benefits for representative populations including students.
- Provide benefits for the corporate partner on participating campuses.

Partnership revenue should not be used to underwrite faculty, staff or administrators’ salaries or benefits. Doing so provides minimal benefit to the previously detailed populations. Additionally, as revenue ebbs and flows with the conclusion of partnership contracts, it makes for an unreliable/unstable funding mechanism.

5.8 Maximize Involvement from Campus Departments

In general, with greater participation from campus departments comes greater ability to generate revenue from a partnership program. Participation from multiple campus departments in a campus partnership program assists in the following ways:

- Expands the pool of assets than can be delivered to potential partners, increasing the appeal of the campus partnership program.
- Decreases the number of partnership entry points into the campus (e.g. potentially high revenue partners gaining access to campus populations via a small partnership with a specific campus department).

Therefore, a thorough inventory of CSULB departments and their ability to provide opportunities for potential partners is essential to the success of the campus partnership program.
6.0 Assigning Values to Assets

In the context of a campus partnership program, an “asset” is defined as a channel or tool that can be used to connect a corporate partner to one or more CSULB affiliated audiences (e.g. students, faculty, staff, alumni, communities, etc.). Campus partnership programs are typically comprised of a mix of these different assets. Values are assigned to each asset in order to determine the total potential value of a proposed partnership package.

Where possible, several variables are used to determine asset value. These include:

- Market Rate: Average or accepted value of similar marketing instruments such as cost per thousand, or CPM. (CPM: The cost paid by marketers to reach 1,000 people.)
- Market Comparisons: Cost of similar offerings at comparable institutions (small markets, FCS football, etc.).

In cases where information is incomplete or absent, assumptions are made to complete the valuation. Additionally, values may be enhanced to reflect the unique nature of campus population (highly educated, current and future high earners, etc.).

The values presented here represent a foundation on which CSULB can generate a sense of the revenue potential of a campus partnership program. While a clear, quantitative approach has been used wherever possible to assign values, it is important to note that these values are based largely on previous experience, educated inferences, and assumptions. Ultimately, the market will dictate program pricing.

6.1 Assigning Value

The default method for determining value is by comparing assets to different media types and assigning a cost per thousand (CPM) value. Average CPM rates of major media types are listed below in Figure 2.

Figure 2: CPM Rates for Major Media Types
Baseline CPM values for different media provide a useful starting point for establishing the value of assets. To further refine value, however, it is useful to compare the pricing of media in different relevant markets. Differences in population, market growth, and socio-economic factors make certain markets more appealing to marketers than others. As such, the value of marketing assets varies widely between different markets.

By comparing the cost of media in different markets, it is possible to produce a Value Adjustment Coefficient (VAC) that further refines the value of assets. To produce the VAC, we compare the cost of out-of-home (OOH) advertising, specifically bulletin-sized billboards in major regional markets.

- OOH Bulletin: The largest standard-sized billboard. Typically 14 feet high and 48 feet wide, a bulletin provides 672 square feet of space of visible space for advertising.

OOH Bulletins provide the optimal benchmark for creating a VAC for several reasons:

- Bulletins are common in all major media markets.
- Bulletins provide uniformity (size and content capabilities are consistent across all markets).
- Rate card pricing of bulletins in multiple markets is readily available.

The current OOH rates for bulletin advertising in select Western markets can be found in Figure 3.

*Figure 3: Average Cost of 4 Week Bulletin Placement in Major Western Markets*

The VAC is defined by comparing the Regional Average (RA) of 11 measured western markets to the Market Average (MA) of the Los Angeles DMA.

- RA: The western regional average for a 4-week OOH Bulletin placement is $5,500.
- MA: The Los Angeles market average for a week OOH Bulletin placement is $5,500.
- MA / RA = 1.0

Therefore, the VAC for benchmark CPM rates assigned to CSULB assets is 1.0.
The VAC is further refined using a series of qualitative measures that take into account the unique and specific nature of CSULB.

- **Audience Affiliation**: The ability of a property to reach and motivate an audience.
- **Audience Composition**: The relative appeal of the property's audience.
- **Property Profile**: How well known, respected, or appealing the property is to both affiliated audiences (e.g., people connected to the property through direct means like students or parents of students) and unaffiliated audiences (people connected to the property through indirect means (like non-alumni fans of teams)).

After applying qualitative measures, the VAC for CSULB Assets is 1.1. The resulting benchmark values for CSULB assets can be found in Figure 4.

*Figure 4: CSULB VAC Adjusted Benchmark CPM Values*

<table>
<thead>
<tr>
<th>Medium</th>
<th>CPM Value</th>
<th>Impression Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email (Dedicated)</td>
<td>$132.00</td>
<td></td>
</tr>
<tr>
<td>Email (Banner)</td>
<td>$5.50</td>
<td></td>
</tr>
<tr>
<td>Direct Mail</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print: Newspaper</td>
<td>$30.80</td>
<td>$9.52</td>
</tr>
<tr>
<td>Print: Magazine</td>
<td></td>
<td>$7.62</td>
</tr>
<tr>
<td>OOH: Transit</td>
<td>$3.72</td>
<td></td>
</tr>
<tr>
<td>OOH: Poster</td>
<td>$3.99</td>
<td></td>
</tr>
<tr>
<td>OOH: Bulletin</td>
<td></td>
<td>$6.33</td>
</tr>
<tr>
<td>Social: Twitter</td>
<td>$7.62</td>
<td></td>
</tr>
<tr>
<td>Social Facebook</td>
<td>$6.33</td>
<td></td>
</tr>
<tr>
<td>Social: Instagram</td>
<td>$4.88</td>
<td></td>
</tr>
<tr>
<td>Online: Premium Display</td>
<td>$11.44</td>
<td></td>
</tr>
<tr>
<td>Online: General Display</td>
<td>$2.09</td>
<td></td>
</tr>
<tr>
<td>Online: Video</td>
<td>$3.30</td>
<td></td>
</tr>
<tr>
<td>Online: Mobile</td>
<td>$2.31</td>
<td></td>
</tr>
<tr>
<td>Radio: Network</td>
<td>$8.58</td>
<td></td>
</tr>
<tr>
<td>Radio: Spot</td>
<td>$10.45</td>
<td></td>
</tr>
<tr>
<td>TV: Cable Network</td>
<td>$9.89</td>
<td></td>
</tr>
<tr>
<td>TV: Spot (Primetime)</td>
<td>$24.53</td>
<td></td>
</tr>
</tbody>
</table>

### 6.2 Impressions

Another method used to determine the value of marketing assets is to assign a multiplier referred to as an “impression.”

- **Impression**: The number of times a marketing asset impacts an individual.

Impressions are often used to magnify the impact of marketing assets. In a typical scenario, an estimated number of impressions are assigned to each asset. For example, a sign at an event can be estimated to generate 3 impressions per person. Extending this scenario, that same event sign would be presumed to generate 3,000 impressions from an audience of 1,000 people (3 impressions per person).

Assigning an impression value to an asset is extremely subjective and results most often from guesswork and supposition. Given their high degree of variability and difficult to defend values, impressions are not used in these value estimates.
7.0 Defining and Valuing CSULB Assets

CSULB Assets are organized into the following categories:

- Email and Direct Mail lists
- Paid Advertising
- Events
- Social Media
- Websites
- Signs and Exposure

While this list of assets is extensive, it should not be considered comprehensive. New assets that can produce opportunities for integrating partners into campus are always being created. As such, this report should be viewed as a living document. Revisiting this report on an annual basis to fine tunes values and add/modify assets is strongly recommended.

7.1 CSULB Assets: Email Lists

Corporate partners can be integrated into CSULB email lists in a variety of ways.

- Dedicated: The entire email is dedicated to partner content.
- Content: Partner content is integrated into the email so that it appears to be part of a larger message.
- Banner: A typical web advertising banner. Size will vary depending on email content.
- Logo: Partner logo appears in the email with other partner logos.

CPM for email lists are as follows

- Dedicated emails at $132
- Email content at $33
- Email banner ads at $5.50
- Logo inclusion at $1.10

(Note: All CPM rates, with the exception of dedicated emails, include eNewsletters.)

CSULB should distribute messages on the partners’ behalf. At no time should CSULB share the list directly with the corporate partner. Primary concerns include:

- Loss of control
- Privacy issues

CSULB email lists are listed on the following pages.
## 7.1 CSULB Assets: Email Lists

<table>
<thead>
<tr>
<th>Dept.</th>
<th>Audience</th>
<th>Frequency</th>
<th>Size</th>
<th>Value per Use</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration and Finance</td>
<td>CSU Procurement Directors</td>
<td>Varies</td>
<td>23</td>
<td>Dedicated: $3</td>
<td>Content: $1</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Banner: $0</td>
<td>Logo: $0</td>
</tr>
<tr>
<td>Academic Affairs</td>
<td>Faculty</td>
<td>10x per month</td>
<td>2,000</td>
<td>Dedicated: $264</td>
<td>Content: $66</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Banner: $11</td>
<td>Logo: $2</td>
</tr>
<tr>
<td>Academic Affairs</td>
<td>Academic Affairs Staff</td>
<td>10x per month</td>
<td>900</td>
<td>Dedicated: $119</td>
<td>Content: $30</td>
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<td></td>
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<td></td>
<td></td>
<td>Banner: $5</td>
<td>Logo: $1</td>
</tr>
<tr>
<td>Alumni and Development</td>
<td>Alumni</td>
<td>Monthly</td>
<td>200,000</td>
<td>Dedicated: $26,400</td>
<td>Content: $6,600</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>Banner: $1,100</td>
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<td>Legislative Community Stakeholders</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Banner: $6</td>
<td>Logo: $1</td>
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<tr>
<td>Alumni and Development</td>
<td>Alumni and Community Advocates</td>
<td>Varies</td>
<td>500</td>
<td>Dedicated: $66</td>
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<td></td>
<td></td>
<td>Banner: $3</td>
<td>Logo: $1</td>
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</table>
### 7.1 CSULB Assets: Email Lists

<table>
<thead>
<tr>
<th>Dept.</th>
<th>Audience</th>
<th>Frequency</th>
<th>Size</th>
<th>Value per Use</th>
<th>Notes</th>
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<td></td>
<td>Banner: $1</td>
<td>Logo: $0</td>
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<td>700</td>
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<td></td>
<td></td>
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<td>Banner: $4</td>
<td>Logo: $1</td>
</tr>
<tr>
<td>Administration and Finance</td>
<td>Customers</td>
<td>Varies</td>
<td>2,000</td>
<td>Dedicated: $264</td>
<td>Content: $66</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>Banner: $11</td>
<td>Logo: $2</td>
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<td>Administration and Finance</td>
<td>All Students and</td>
<td>Biannually</td>
<td>40,000</td>
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<td>Content: $1,320</td>
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<td></td>
<td>Employees</td>
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<td></td>
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<td>Community &amp; Parking</td>
<td>3x per year</td>
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<td>Content: $66</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>Banner: $11</td>
<td>Logo: $2</td>
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<tr>
<td>Administration and Finance</td>
<td>Regional Bus Riders</td>
<td>3x per year</td>
<td>6,000</td>
<td>Dedicated: $792</td>
<td>Content: $198</td>
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<td></td>
<td></td>
<td></td>
<td>Banner: $33</td>
<td>Logo: $7</td>
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</table>
### 7.1 CSULB Assets: Email Lists

<table>
<thead>
<tr>
<th>Dept.</th>
<th>Audience</th>
<th>Frequency</th>
<th>Size</th>
<th>Value per Use</th>
<th>Notes</th>
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<tbody>
<tr>
<td>Student Affairs</td>
<td>Student Recreation &amp; Wellness Center Members</td>
<td>Varies</td>
<td>23,309</td>
<td>Dedicated: $3,077</td>
<td>Content: $769</td>
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<td></td>
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<td>Banner: $128</td>
<td>Logo: $26</td>
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<td></td>
<td>Student Affairs ASI Weekly Events</td>
<td>Weekly</td>
<td>4,438</td>
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<td>Content: $146</td>
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<td>Banner: $24</td>
<td>Logo: $5</td>
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<tr>
<td></td>
<td>22 West Media</td>
<td>Monthly</td>
<td>912</td>
<td>Dedicated: $120</td>
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<td></td>
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<td></td>
<td>Banner: $5</td>
<td>Logo: $1</td>
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<tr>
<td></td>
<td>ASI Government Alumni</td>
<td>Varies</td>
<td>231</td>
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<td>Content: $8</td>
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<td></td>
<td></td>
<td></td>
<td>Banner: $1</td>
<td>Logo: $0</td>
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<tr>
<td>Academic Affairs</td>
<td>Deans</td>
<td>Biweekly</td>
<td>9</td>
<td>Dedicated: $1</td>
<td>Content: $0</td>
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<td></td>
<td></td>
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<td></td>
<td>Banner: $0</td>
<td>Logo: $0</td>
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<tr>
<td></td>
<td>Associate Deans</td>
<td>Biweekly</td>
<td>25</td>
<td>Dedicated: $3</td>
<td>Content: $1</td>
</tr>
<tr>
<td></td>
<td></td>
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<td></td>
<td>Banner: $0</td>
<td>Logo: $0</td>
</tr>
<tr>
<td>Performing Arts</td>
<td>Carpenter Center General Audience</td>
<td>Varies</td>
<td>24,000</td>
<td>Dedicated: $3,168</td>
<td>Content: $792</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Banner: $132</td>
<td>Logo: $26</td>
</tr>
</tbody>
</table>
7.2 CSULB Assets: Direct Lists

As with email lists, corporate partners can be integrated into CSULB direct mail lists in a variety of ways.

- Dedicated: The entire mailer is dedicated to partner content.
- Insert: A partner advertisement is inserted into the mailer.
- Content: A partner provides advertorial content that is part of the mailer.
- Logo: Partner logo appears in the mailer with other partner logos.

CPM for mailings lists are as follows:

- Dedicated mails: $62.15
- Inserts: $34.10
- Dominant logos: $5.50
- Participant logos: $1.10

CSULB should distribute messages on the partners' behalf. At no time should CSULB share the list directly with the corporate partner. Primary concerns include:

- Loss of control
- Privacy issues
## 7.2 CSULB Assets: Direct Lists

<table>
<thead>
<tr>
<th>Dept.</th>
<th>Audience</th>
<th>Frequency</th>
<th>Size</th>
<th>Value per Use</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performing Arts</td>
<td>Previous Ticket Buyers</td>
<td>Quarterly</td>
<td>15,000</td>
<td>Dedicated: $932 Insert: $512 Logo (Dominant): $83 Logo (Participant): $17</td>
<td>Postcard</td>
</tr>
<tr>
<td>Performing Arts</td>
<td>Previous Subscribers</td>
<td>Annually</td>
<td>12,000</td>
<td>Dedicated: $746 Insert: $409 Logo (Dominant): $66 Logo (Participant): $13</td>
<td>Brochure</td>
</tr>
<tr>
<td>Performing Arts</td>
<td>Previous Buyers and Subscribers</td>
<td>Annually</td>
<td>90,000</td>
<td>Dedicated: $5,594 Insert: $3,069 Logo (Dominant): $495 Logo (Participant): $99</td>
<td>Brochure</td>
</tr>
<tr>
<td>Alumni and Development</td>
<td>Alumni</td>
<td>Quarterly</td>
<td>200,000</td>
<td>Dedicated: $12,430 Insert: $6,820 Logo (Dominant): $1,100 Logo (Participant): $220</td>
<td>Magazine</td>
</tr>
<tr>
<td>Administration and Finance</td>
<td>49er Shops Employees</td>
<td>Varies</td>
<td>700</td>
<td>Dedicated: $44 Insert: $24 Logo (Dominant): $4 Logo (Participant): $1</td>
<td></td>
</tr>
<tr>
<td>Administration and Finance</td>
<td>Beach on 2nd Street Customer List</td>
<td>Varies</td>
<td>2,000</td>
<td>Dedicated: $124 Insert: $68 Logo (Dominant): $11 Logo (Participant): $2</td>
<td></td>
</tr>
<tr>
<td>Administration and Finance</td>
<td>Bookstore Mailing List</td>
<td>Varies</td>
<td>10,000</td>
<td>Dedicated: $622 Insert: $341 Logo (Dominant): $55 Logo (Participant): $11</td>
<td></td>
</tr>
</tbody>
</table>
7.3 CSULB Assets: Social Media

CSULB maintains a number of social media channels designed to reach different campus populations. Typically, social media is used to highlight partner engagement on campus, rather than focus on a standalone post or advertisement.

CPMs for social media are as follows:

- Facebook: $6.33
- Twitter: $7.62
- Instagram: $4.88
- LinkedIn: $9.23
- YouTube: $10.87

All calculations for value assume four (4) social media applications for a corporate partner per year.
### 7.3 CSULB Assets: Social Media

<table>
<thead>
<tr>
<th>Dept.</th>
<th>Network</th>
<th>Size</th>
<th>Recommended Frequency</th>
<th>Value (4x annually)</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Affairs</td>
<td>Instagram</td>
<td>700</td>
<td>4x annually</td>
<td>$14</td>
<td>@csulshs</td>
</tr>
<tr>
<td>Student Affairs</td>
<td>Instagram</td>
<td>1,570</td>
<td>4x annually</td>
<td>$31</td>
<td>@csulbcdc</td>
</tr>
<tr>
<td>Student Affairs</td>
<td>Instagram</td>
<td>1,300</td>
<td>4x annually</td>
<td>$25</td>
<td>@csulb.eop</td>
</tr>
<tr>
<td>Student Affairs</td>
<td>Instagram</td>
<td>1,000</td>
<td>4x annually</td>
<td>$20</td>
<td>@csulbprojectocean</td>
</tr>
<tr>
<td>Student Affairs</td>
<td>Instagram</td>
<td>1,000</td>
<td>4x annually</td>
<td>$20</td>
<td>@csulb.sld</td>
</tr>
<tr>
<td>Performing Arts</td>
<td>Facebook</td>
<td>8,419</td>
<td>4x Annually</td>
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<td>Performing Arts</td>
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<td>713</td>
<td>4x annually</td>
<td>$14</td>
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<td>Performing Arts</td>
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<td>1,925</td>
<td>4x annually</td>
<td>$59</td>
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<td>Academic Affairs</td>
<td>Twitter</td>
<td>350</td>
<td>4x annually</td>
<td>$11</td>
<td>@provost_jersky</td>
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<tr>
<td>Academic Affairs</td>
<td>Instagram</td>
<td>260</td>
<td>4x annually</td>
<td>$5</td>
<td>@provost_jersky</td>
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### 7.3 CSULB Assets: Social Media

<table>
<thead>
<tr>
<th>Dept.</th>
<th>Network</th>
<th>Size</th>
<th>Recommended Frequency</th>
<th>Value (4x annually)</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin and Finance</td>
<td>Twitter</td>
<td>1,010</td>
<td>4x annually</td>
<td>$31</td>
<td>@csulb_parking</td>
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<td>Admin and Finance</td>
<td>Instagram</td>
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<td>LinkedIn</td>
<td>197,385</td>
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<td>@CaliforniaStateUniversityLongBeach</td>
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<td>University Relations</td>
<td>Facebook</td>
<td>83,698</td>
<td>4x annually</td>
<td>$2,119</td>
<td>@csulb</td>
</tr>
<tr>
<td>University Relations</td>
<td>Instagram</td>
<td>33,756</td>
<td>4x annually</td>
<td>$659</td>
<td>@csulongbeach</td>
</tr>
<tr>
<td>University Relations</td>
<td>Twitter</td>
<td>24,657</td>
<td>4x annually</td>
<td>$752</td>
<td>@csulb</td>
</tr>
<tr>
<td>University Relations</td>
<td>YouTube</td>
<td>697</td>
<td>4x annually</td>
<td>$30</td>
<td>@csulb</td>
</tr>
<tr>
<td>Admin and Finance</td>
<td>Twitter</td>
<td>2,804</td>
<td>4x annually</td>
<td>$85</td>
<td>@CSULBBookstore</td>
</tr>
<tr>
<td>Admin and Finance</td>
<td>Instagram</td>
<td>8,974</td>
<td>4x annually</td>
<td>$175</td>
<td>@49ershops</td>
</tr>
<tr>
<td>Admin and Finance</td>
<td>Facebook</td>
<td>7,999</td>
<td>4x annually</td>
<td>$203</td>
<td>@CSULBBookstore</td>
</tr>
</tbody>
</table>
7.3 CSULB Assets: Social Media

<table>
<thead>
<tr>
<th>Dept.</th>
<th>Network</th>
<th>Size</th>
<th>Recommended Frequency</th>
<th>Value (4x annually)</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin and Finance</td>
<td>YouTube</td>
<td>36</td>
<td>4x annually</td>
<td>$42</td>
<td>@49erShopsComms</td>
</tr>
<tr>
<td>Associated Students</td>
<td>Facebook</td>
<td>8,970</td>
<td>4x annually</td>
<td>$227</td>
<td>@csulbasi</td>
</tr>
<tr>
<td>Associated Students</td>
<td>Twitter</td>
<td>3,980</td>
<td>4x annually</td>
<td>$121</td>
<td>@CSULBASI</td>
</tr>
<tr>
<td>Associated Students</td>
<td>Instagram</td>
<td>12,900</td>
<td>4x annually</td>
<td>$252</td>
<td>@csulbasi</td>
</tr>
<tr>
<td>Associated Students</td>
<td>Facebook</td>
<td>8,116</td>
<td>4x annually</td>
<td>$205</td>
<td>@CSULBSRWC</td>
</tr>
<tr>
<td>Associated Students</td>
<td>Twitter</td>
<td>567</td>
<td>4x annually</td>
<td>$17</td>
<td>@CSULBSRWC</td>
</tr>
<tr>
<td>Associated Students</td>
<td>Instagram</td>
<td>2,885</td>
<td>4x annually</td>
<td>$56</td>
<td>@csulbsrwc</td>
</tr>
<tr>
<td>Athletics</td>
<td>Twitter</td>
<td>9,982</td>
<td>4x annually</td>
<td>$304</td>
<td>@LBSUAthletics</td>
</tr>
<tr>
<td>Athletics</td>
<td>Instagram</td>
<td>16,100</td>
<td>4x annually</td>
<td>$314</td>
<td>@lbsu</td>
</tr>
<tr>
<td>Athletics</td>
<td>Facebook</td>
<td>19,254</td>
<td>4x annually</td>
<td>$488</td>
<td>@LBSUAthletics</td>
</tr>
</tbody>
</table>
### 7.3 CSULB Assets: Social Media

<table>
<thead>
<tr>
<th>Dept.</th>
<th>Network</th>
<th>Size</th>
<th>Recommended Frequency</th>
<th>Value (4x annually)</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alumni and Development</td>
<td>Facebook</td>
<td>10,138</td>
<td>4x annually</td>
<td>$257</td>
<td>@csulbalumni</td>
</tr>
<tr>
<td>Alumni and Development</td>
<td>Twitter</td>
<td>1,369</td>
<td>4x annually</td>
<td>$42</td>
<td>@csulbalumni</td>
</tr>
<tr>
<td>Alumni and Development</td>
<td>Instagram</td>
<td>2,618</td>
<td>4x annually</td>
<td>$51</td>
<td>@csulbalumni</td>
</tr>
</tbody>
</table>
### 7.4 CSULB Assets: Websites

Assigning values to website advertising is more challenging due to the number of different models for doing so.

- **CPM**: Cost per Thousand. Advertiser pays based on the number of people who are served (see) the ad.
- **CTR/CPC**: Click-Thru Rate or Cost Per Click. Advertiser pays based on the number of people who click on the ad.
- **CTA**: Cost to Acquire: Advertiser pays based on the number of people who make a purchase after clicking on the ad.

As site visitation is the most uniformly available data point regarding all CSULB websites, CPM is the most useful valuation metric.

Display advertising, the most common form of web advertising, is separated into two categories:

- **Premium display**: High profile placements of highly engaging content (e.g. video) that captures a greater share of attention.
- **General display**: Typical web advertisements such as banners, skyscrapers, etc.

Values for CSULB web assets are as follows:

- **Premium display**: $11.44
- **General display**: $2.09
### 7.4 CSULB Assets: Websites

<table>
<thead>
<tr>
<th>Dept.</th>
<th>Website</th>
<th>Address</th>
<th>Monthly Visitors</th>
<th>Value per Month</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration and Finance</td>
<td>Purchasing</td>
<td>csulb.edu/offices/financial/purchasing</td>
<td>2,627</td>
<td>Premium: $30</td>
<td>General: $5</td>
</tr>
<tr>
<td>Administration and Finance</td>
<td>Bursar Office</td>
<td>csulb.edu/offices/financial/bursar</td>
<td>2,278</td>
<td>Premium: $26</td>
<td>General: $5</td>
</tr>
<tr>
<td>Administration and Finance</td>
<td>Controller</td>
<td>csulb.edu/offices/financial/controller</td>
<td>991</td>
<td>Premium: $11</td>
<td>General: $2</td>
</tr>
<tr>
<td>Administration and Finance</td>
<td>Finance</td>
<td>csulb.edu/offices/financial</td>
<td>428</td>
<td>Premium: $5</td>
<td>General: $1</td>
</tr>
<tr>
<td>Performing Arts</td>
<td>Carpenter</td>
<td>carpenterarts.org</td>
<td>15,000</td>
<td>Premium: $172</td>
<td>General: $31</td>
</tr>
<tr>
<td>Administration and Finance</td>
<td>Parking</td>
<td>csulb.edu/parking</td>
<td>38,000</td>
<td>Premium: $435</td>
<td>General: $79</td>
</tr>
<tr>
<td>Communications</td>
<td>University</td>
<td>csulb.edu</td>
<td>2,640,000</td>
<td>Premium: $30,202</td>
<td>General: $5,518</td>
</tr>
<tr>
<td>Administration and Finance</td>
<td>Forty Niner Shops</td>
<td>fortyninershops.net</td>
<td>170,000</td>
<td>Premium: $1,945</td>
<td>General: $355</td>
</tr>
<tr>
<td>Academic Affairs</td>
<td>Library Research Guides</td>
<td>csulb.libguides.com</td>
<td>76,830</td>
<td>Premium: $1879</td>
<td>General: $161</td>
</tr>
</tbody>
</table>
7.4 CSULB Assets: Websites

CSULB Homepage Premium Display (potential)

CSULB Homepage General Display (potential)

49er Shops Premium Display (potential)

49er Shops General Display (potential)
7.5 CSULB Assets: Events

Events present corporate partners with a unique and visible way to showcase their involvement on campus.

As with most campuses, CSULB hosts hundreds of events annually, reaching thousands of students, faculty, staff, alumni, and other related communities.

This report focuses on those events that reach a large number of a specific audience, and therefore would be most appealing to potential partners.

- Smaller events are not without value. To certain sponsors, smaller events with specific populations may have high appeal.
- However, because of the sheer volume of campus events, this report concentrates on the most significant. Others can be added into a campus partnership as interest or need arises.

Events frequently combine tangible assets (recognition, hospitality, digital, etc.) with intangible benefits (prestige, access, uniqueness, etc.). Valuing events, therefore, requires a bit more art than science. Estimated values are based off of attendance and/or attractiveness of the audience to corporate partners. Additionally, partners are often integrated at different levels, depending on investment. This report examines 2 event partnership levels:

- Equity: Generally considered to be the title or naming sponsor of the event. Only one.
- Participant: One of many sponsors that invest at a lower level.

Lastly, because many events already have established pricing for partners/sponsors, values must be aligned wherever possible.
## 7.5 CSULB Assets: Events

<table>
<thead>
<tr>
<th>Dept.</th>
<th>Event Name</th>
<th>Target Audience</th>
<th>Attendees (Estimated)</th>
<th>Estimated Value</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Affairs</td>
<td>Cultural Graduation Celebrations</td>
<td>Students, parents, families, community</td>
<td>10,000</td>
<td>Equity: $15,000</td>
<td>Participant: $2,500</td>
</tr>
<tr>
<td>Student Affairs</td>
<td>Long Beach Step Show</td>
<td>Students, community</td>
<td>1,500</td>
<td>Equity: $5,000</td>
<td>Participant: $1,000</td>
</tr>
<tr>
<td>Student Affairs</td>
<td>Graduate &amp; Professional School Fair</td>
<td>Students</td>
<td>1,000</td>
<td>Equity: $4,000</td>
<td>Participant: $450</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>The registration fee for a recruiting table is $450.</td>
</tr>
<tr>
<td>Student Affairs</td>
<td>Housing Open House</td>
<td>Prospective students and families</td>
<td>1,200</td>
<td>Equity: $4,000</td>
<td>Participant: $1,000</td>
</tr>
<tr>
<td>Student Affairs</td>
<td>College Inclusion Summit</td>
<td>Prospective students, community partners, families</td>
<td>500</td>
<td>Equity: $2,500</td>
<td>Participant: $500</td>
</tr>
<tr>
<td>Performing Arts</td>
<td>Season Shows</td>
<td>Community</td>
<td>600-1000</td>
<td>Equity: $25,000</td>
<td>Participant: $5,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Present 27 shows per year, typical attendance ranges from 600 to 1,000.</td>
</tr>
<tr>
<td>Academic Affairs</td>
<td>Commencement</td>
<td>Students</td>
<td>100,000</td>
<td>Equity: $50,000</td>
<td>Participant: $10,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>While potentially valuable, any revenue gains may be offset by negative</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>ramifications associated with a corporate presence at graduation</td>
</tr>
<tr>
<td>Academic Affairs</td>
<td>University Achievement Awards</td>
<td></td>
<td>50</td>
<td>Equity: $1,000</td>
<td>Participant: $250</td>
</tr>
<tr>
<td>Academic Affairs</td>
<td>Convocation</td>
<td></td>
<td>500</td>
<td>Equity: $2,500</td>
<td>Participant: $500</td>
</tr>
<tr>
<td>Academic Affairs</td>
<td>Student Research Competition</td>
<td></td>
<td>200</td>
<td>Equity: $2,000</td>
<td>Participant: $250</td>
</tr>
</tbody>
</table>
### 7.5 CSULB Assets: Events

<table>
<thead>
<tr>
<th>Dept.</th>
<th>Event Name</th>
<th>Target Audience</th>
<th>Attendees (Estimated)</th>
<th>Estimated Value</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin and Finance</td>
<td>Sustainability Week</td>
<td>Student employees</td>
<td>5,000</td>
<td>Equity: $10,000</td>
<td>Participant: $1,000</td>
</tr>
<tr>
<td>Admin and Finance</td>
<td>Bowling for Books</td>
<td></td>
<td>300</td>
<td>Equity: $15,000</td>
<td>Participant: $500</td>
</tr>
<tr>
<td>Admin and Finance</td>
<td>GradFair</td>
<td>Students</td>
<td>8,000</td>
<td>Equity: $10,000</td>
<td>Participant: $2,500</td>
</tr>
<tr>
<td>Admin and Finance</td>
<td>Alumni-Faculty Night</td>
<td></td>
<td>1,000</td>
<td>Equity: $5,000</td>
<td>Participant: $500</td>
</tr>
<tr>
<td>Admin and Finance</td>
<td>Book Buy-Back</td>
<td>Students</td>
<td>10,000</td>
<td>Equity: $10,000</td>
<td>Participant: $2,500</td>
</tr>
<tr>
<td>Academic Affairs</td>
<td>Data Fellows Symposium</td>
<td>Faculty, staff, students</td>
<td>100</td>
<td>Equity: $2,000</td>
<td>Participant: $500</td>
</tr>
<tr>
<td>Associated Students Inc.</td>
<td>Smorgasport</td>
<td>Students</td>
<td>7,000</td>
<td>Equity: $10,000</td>
<td>Participant: $2,000</td>
</tr>
<tr>
<td>Associated Students Inc.</td>
<td>Week of Welcome</td>
<td>Students</td>
<td>7,500</td>
<td>Equity: $10,000</td>
<td>Participant: $2,000</td>
</tr>
<tr>
<td>Associated Students Inc.</td>
<td>The Big Event Concert</td>
<td>Students</td>
<td>4,500</td>
<td>Equity: $10,000</td>
<td>Participant: $2,500</td>
</tr>
<tr>
<td>Associated Students Inc.</td>
<td>Owens Condition for Tuition</td>
<td>Students</td>
<td>7,000</td>
<td>Equity: $10,000</td>
<td>Participant: $2,500</td>
</tr>
</tbody>
</table>
### 7.5 CSULB Assets: Events

<table>
<thead>
<tr>
<th>Dept.</th>
<th>Event Name</th>
<th>Target Audience</th>
<th>Attendees (Estimated)</th>
<th>Estimated Value</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alumni and Development</td>
<td>Distinguished Alumni (Fall)</td>
<td>Alumni</td>
<td>400</td>
<td>Equity: $2,000</td>
<td>Participant: $250</td>
</tr>
<tr>
<td>Alumni and Development</td>
<td>Winter Festival (Dec)</td>
<td>Donors</td>
<td>150</td>
<td>Equity: $2,500</td>
<td>Participant: $500</td>
</tr>
<tr>
<td>Alumni and Development</td>
<td>President Gala</td>
<td></td>
<td>1,000</td>
<td>Equity: $5,000</td>
<td>Participant: $1,000</td>
</tr>
</tbody>
</table>
7.6 CSULB Assets: Signs and Exposure

Like most universities, CSULB has an extensive array of assets that may be used to display partner brands, images, and advertising.

The majority of these signs, displays, and screens present valuation challenges, as they fall outside of what is typically considered to be a “norm.” However, using CPM rates for similar media, specifically out-of-home advertising, it is possible to develop asset values with relative accuracy.

- OOH Bulletin (large format): $9.52
- OOH Poster (medium format): $3.99
- OOH Transit (small format): $3.72
- OOH Digital (small format): $1.50
## 7.6 CSULB Assets: Signs and Exposure

<table>
<thead>
<tr>
<th>Dept.</th>
<th>Type</th>
<th>Location</th>
<th>Attendees (Estimated)</th>
<th>Estimated Annual Value</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performing Arts</td>
<td>Places to hang posters or banners</td>
<td>Carpenter</td>
<td>50,000</td>
<td>$476</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Video monitors / displays that provide information messages</td>
<td>Performing Arts Center</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Electronic message boards</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Light display above theatre doors</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Table tents on cabaret tables</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Admin and Finance</td>
<td>Places to hang posters or banners</td>
<td>3 Parking Structures and 21 surface lots</td>
<td>100,000</td>
<td>$399</td>
<td></td>
</tr>
<tr>
<td>Admin and Finance</td>
<td>Places to hang posters or banners</td>
<td>Print Shop</td>
<td>5,000</td>
<td>$20</td>
<td></td>
</tr>
<tr>
<td>Admin and Finance</td>
<td>Places to hang posters or banners</td>
<td>Parking Office</td>
<td>3,000</td>
<td>$12</td>
<td></td>
</tr>
<tr>
<td>Admin and Finance</td>
<td>Places to hang posters or banners</td>
<td>BAAC Conference Center</td>
<td>5,000</td>
<td>$20</td>
<td></td>
</tr>
<tr>
<td>Admin and Finance</td>
<td>Places to hang posters or banners</td>
<td>UDP</td>
<td>30,000</td>
<td>$120</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Video monitors / displays that provide information messages</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Electronic message boards</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Large format video displays</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Admin and Finance</td>
<td>Places to hang posters or banners</td>
<td>Beach on 2nd St</td>
<td>70,000</td>
<td>$279</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Video monitors / displays that provide information messages</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Electronic message boards</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Large format video displays</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## 7.6 CSULB Assets: Signs and Exposure

<table>
<thead>
<tr>
<th>Dept.</th>
<th>Type</th>
<th>Location</th>
<th>Attendees (Estimated)</th>
<th>Estimated Annual Value</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin and Finance</td>
<td>Places to hang posters or banners</td>
<td>Bookstore</td>
<td>20,000</td>
<td>$80</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Video monitors / displays that provide information messages</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Electronic message boards</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Large format video displays</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Associated Students</td>
<td>Places to hang posters or banners</td>
<td>University Student Union</td>
<td>1,258,630</td>
<td>$11,982</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Video monitors / displays that provide information messages</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Electronic message boards</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Large format video displays</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Associated Students</td>
<td>Places to hang posters or banners</td>
<td>Student Recreation &amp; Wellness Center</td>
<td>720,085</td>
<td>$6,855</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Video monitors / displays that provide information messages</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Electronic message boards</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Large format video displays</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Associated Students</td>
<td>Places to hang posters or banners</td>
<td>ASI Recycling Center</td>
<td>28,614</td>
<td>$114</td>
<td>Number of individual buyback transactions (tickets)</td>
</tr>
<tr>
<td></td>
<td>Video monitors / displays that provide information messages</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Electronic message boards</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Large format video displays</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academic Affairs</td>
<td>Places to hang posters or banners</td>
<td>University Library</td>
<td>1,000,000</td>
<td>$3,990</td>
<td></td>
</tr>
</tbody>
</table>
7.7 CSULB Assets: Advertising

As an institution, CSULB has two types of advertising assets that can leverage on behalf of a partner:

- **Campus advertising expenditures**: Advertising purchases made by University departments or areas to promote events, programs or activities that can include partner messages or logos.
  - Example: Performing Arts advertising to promote performances.
- **Campus advertising channels**: University owned or managed media networks that include or support advertising messages.
### 7.7 CSULB Assets: Advertising

<table>
<thead>
<tr>
<th>Dept.</th>
<th>Medium</th>
<th>Type</th>
<th>Audience (Estimated)</th>
<th>Estimated Annual Value</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performing Arts</td>
<td>Radio, Print, Social Media, Digital</td>
<td></td>
<td></td>
<td>$160,000</td>
<td>Have not included sponsorships in advertising in the last 5 years.</td>
</tr>
<tr>
<td>Admin and Finance</td>
<td>Print, Social Media, OOH</td>
<td></td>
<td></td>
<td>Under $25,000</td>
<td>Estimated spending on advertising.</td>
</tr>
<tr>
<td>Communications</td>
<td>TV, Social Media, Digital</td>
<td></td>
<td></td>
<td>$50,001 - $100,000</td>
<td>Estimated spending on advertising.</td>
</tr>
<tr>
<td>University</td>
<td>Print</td>
<td></td>
<td></td>
<td>$619,396</td>
<td>Combined advertising spend from CalUSource Spending Report.</td>
</tr>
</tbody>
</table>
8.0 Using Assets and Values

8.1 An Evolving Document

All the assets and values presented in this report should be considered fluid.

- New assets are constantly being developed and implemented (e.g. new events).
- Markets change constantly as well, impacting the real and perceived value of assets.

As such, this report and its contents should be viewed as a living document. CSULB should periodically revisit the findings presented here and make additions, changes and modifications that address new conditions.

8.2 Creating Asset Packages

In the best scenarios, partnership packages are comprised of assets that reflect the marketing and business development objective of the industry category being pursued. To determine which assets should be included in partnership proposal, the process of developing partnership packages should include the following steps.

8.2.1 Category Research

Each industry category is typified by general approaches to reaching new customers. Obtaining a baseline understanding of how this is done is critical to developing a compelling partnership package. Essential questions to answer can include (but are not necessarily limited to) the following:

- Is the industry business-to-consumer (B2C) focused or business-to-business (B2B) focused?
- Generally, what does the industry category target audience look like?
- What are the largest competitors in the industry?
- How do the category’s businesses position themselves in marketing and advertising, and what messages are they attempting to convey?
- What other organizations do businesses from the category typically sponsor or partner with?
- What external forces influence the category?
  - For example, is the industry highly regulated?
- Internally, how do the category’s businesses interact with CSULB?

Answering questions like these make it possible to understand the unique nuances of an industry category, and then to assemble a preliminary package that addresses key objectives.

8.2.2 Preliminary Package Development

With initial category research completed, CSULB will then review its assets to determine which are best suited to meeting the business development and positioning needs of the industry category.

From a business development perspective, B2C businesses (apparel, financial services, etc.) may see the most value in assets that allow them to directly reach specific CSULB populations (e.g. students, faculty, alumni, parents, etc.). This could involve social media, access to email lists, and on-
campus events like Week of Welcome. Conversely, B2B companies will be more interested in assets that target business owners and leaders in the community, such as the College of Business conferences and Alumni events targeting prominent alums.

**Positioning** will also play a role in package development. Aligning partners with campus program and activities can play a key role in how they are received on campus. Examples can include:

- **Sustainability Initiatives**: Certain categories of business (energy, waste management, etc.) put an emphasis on sustainability, and can therefore find benefit from aligning with campus-wide Sustain U program.
- **Beach Pantry**: Business in aligned categories (grocery, consumer packaged goods, etc.) that feature robust corporate citizenship programs will value being integrated into the campus food pantry and other hunger related programming.
- **Performing Arts**: Arts programming tends to reach audiences from higher income demographics. Categories of business that leverage the arts or seek to reach this type of audience (automotive, hotel, financial) will find value through an association with CSULB Theatre Arts complex.

As referenced, each partnership package should include elements that address the industry category’s objectives. Packages should be further augmented with benefits from throughout CSULB’s asset catalogue. While these assets may not immediately address partner objectives, they add important scale to the partnership. This in turn increases the value of the packages while integrating other departments that may not have been included (e.g. athletics).

The initial design of a proposed partnership package combines assets from multiple departments across campus into a single, integrated marketing platform. For example:

---

8.2.3 RFP Integration and Responses
Once completed, the partnership package is then integrated directly into an RFP as a required part of the total RFP response. Respondents will be required to assign a price for the partnership package as defined in the RFP, with clear expectations on how that price will be evaluated in relation to other elements (e.g. price for products/services, support and service capabilities, warranties, etc.).

CSULB will need to determine how much emphasis to put on the partnership package in terms of evaluating the total RFP response. This can vary between different RFPs.

**8.2.4 Prospective Partner Negotiation and “Last Best Offers”**

In the majority of cases, there will be a small subset of responses to the RFP that will warrant further negotiations.

As CSULB enters into negotiation with these finalists, the partnership program can be tweaked to include more or different assets designed to increase value to the partner. This should be done with the prospective partner to ensure the package aligns with their specific business objectives.

At the conclusion of the phase, CSULB should seek to obtain the “last best offer” from each prospective partner.

**8.2.5 Finalization**

Following receipt of last best offers, CSULB will be in a position to select a partner and enter into final negotiation.

**8.3 Pricing Packages**

Few partnerships are offered at the sum of their assets. The values presented in this report should be considered “rate card” pricing for CSULB marketing assets:

- **Rate Card**: The retail price of marketing assets if purchased individually or “a la carte.”

When combining multiple assets into a partnership program, a package discount rate is applied. This discount rate can vary widely, and is impacted by a number of considerations such as size of the industry, the competitiveness of the category, the amount of business done on campus, etc.

Typically, discount rates for partnership packages are 15%-25% off the calculated rate card value. To protect CSULB’s negotiating position, the recommendation is to limit package discounts to 15% in the initial phases of partnership development.

Pricing of a proposed package based on the previous example is included on the next page.
<table>
<thead>
<tr>
<th>Asset</th>
<th>Rate Card Value</th>
<th>Discount Value (15%)</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SIGNAGE EXPOSURE</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partner ID on Student Union Signage</td>
<td>$11,982</td>
<td>$10,185</td>
<td></td>
</tr>
<tr>
<td>Partner ID on Student Recreation &amp; Wellness Center Signage</td>
<td>$6,855</td>
<td>$5,827</td>
<td></td>
</tr>
<tr>
<td>Partner ID on Library Signage</td>
<td>$3,990</td>
<td>$3,392</td>
<td></td>
</tr>
<tr>
<td>Partner ID on Performing Arts Signage</td>
<td>$476</td>
<td>$405</td>
<td></td>
</tr>
<tr>
<td><strong>CSULB ADVERTISING</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partner ID in Performing Arts Advertising</td>
<td>$16,000</td>
<td>$13,600</td>
<td></td>
</tr>
<tr>
<td>Partner ID in University Communications Advertising</td>
<td>$10,000</td>
<td>$8,500</td>
<td></td>
</tr>
<tr>
<td><strong>ADDITIONAL MARKETING MATERIALS</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct Mailer to Alumni Database</td>
<td>$12,430</td>
<td>$10,566</td>
<td></td>
</tr>
<tr>
<td>Direct Mailer to Performing Arts Database</td>
<td>$7,272</td>
<td>$6,181</td>
<td></td>
</tr>
<tr>
<td><strong>DIGITAL MEDIA</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partner Ad/ID in Alumni Email Communications</td>
<td>$26,400</td>
<td>$22,440</td>
<td></td>
</tr>
<tr>
<td>Partner Ad/ID in Student Affairs Email Communications</td>
<td>$3,077</td>
<td>$2,615</td>
<td></td>
</tr>
<tr>
<td>Partner Ad/ID in Performing Arts Email Communications</td>
<td>$3,168</td>
<td>$2,693</td>
<td></td>
</tr>
<tr>
<td><strong>CSULB WEBSITES</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rotating Banner Ad/ID on 49er Shops Website</td>
<td>$23,338</td>
<td>$19,837</td>
<td></td>
</tr>
<tr>
<td><strong>SOCIAL MEDIA INTEGRATION</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partner Message to University Social Media</td>
<td>$10,847</td>
<td>$9,220</td>
<td>Assumes 4x annually</td>
</tr>
<tr>
<td>Partner Message to Athletics Social Media</td>
<td>$1,106</td>
<td>$940</td>
<td>Assumes 4x annually</td>
</tr>
</tbody>
</table>
### PARTNER ACTIVATION/EVENT INTEGRATION

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Base Value</th>
<th>B2C Value</th>
<th>% Adjusted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner Activation/Integration at Athletics Events</td>
<td>$10,000</td>
<td>$8,500</td>
<td></td>
</tr>
<tr>
<td>Partner Activation/Integration at Alumni Events</td>
<td>$10,000</td>
<td>$8,500</td>
<td></td>
</tr>
<tr>
<td>Partner Activation/Integration at Associated Students Events</td>
<td>$10,000</td>
<td>$8,500</td>
<td></td>
</tr>
<tr>
<td>Partner Activation/Integration at Performing Arts Events</td>
<td>$10,000</td>
<td>$8,500</td>
<td></td>
</tr>
</tbody>
</table>

### LICENSING

<table>
<thead>
<tr>
<th>Position and Marks</th>
<th>Base Value</th>
<th>B2C Value</th>
<th>% Adjusted</th>
</tr>
</thead>
<tbody>
<tr>
<td>$17,694</td>
<td>$15,040</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL** $194,634 $165,439

---

#### 8.4 Modifying Packages

In the early stages of establishing a partnership package, CSULB will be making educated inferences regarding the business needs and objectives of potential partners. In fact, the final partnership package may ultimately look substantially different from the initial package offered.

To illustrate fluidity when packaging assets, the following chart provides a hypothetical comparison between discounted package values through modifications to the proposed base package of benefits.

<table>
<thead>
<tr>
<th>Asset</th>
<th>Base Package Value (Discount Rate 15%)</th>
<th>B2C Package Value (15%)</th>
<th>% Adjusted</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SIGNAGE EXPOSURE</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partner ID on Student Union Signage</td>
<td>$10,185</td>
<td>$10,185</td>
<td></td>
</tr>
<tr>
<td>Partner ID on Student Recreation &amp; Wellness Center Signage</td>
<td>$5,827</td>
<td>$5,827</td>
<td></td>
</tr>
<tr>
<td>Partner ID on Library Signage</td>
<td>$3,392</td>
<td>$3,392</td>
<td></td>
</tr>
<tr>
<td>Partner ID on Performing Arts Signage</td>
<td>$405</td>
<td>$405</td>
<td></td>
</tr>
<tr>
<td><strong>CSULB ADVERTISING</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partner ID in Performing Arts Advertising</td>
<td>$13,600</td>
<td>$20,400</td>
<td>+50%</td>
</tr>
<tr>
<td>Partner ID in University Communications Advertising</td>
<td>$8,500</td>
<td>$17,000</td>
<td>+100%</td>
</tr>
<tr>
<td><strong>ADDITIONAL MARKETING MATERIALS</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct Mailer to Alumni Database</td>
<td>$10,566</td>
<td>$15,848</td>
<td>+50%</td>
</tr>
<tr>
<td>Direct Mailer to Performing Arts Database</td>
<td>$6,181</td>
<td>$9,271</td>
<td>+50%</td>
</tr>
<tr>
<td><strong>DIGITAL MEDIA</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partner Ad/ID in Alumni Email Communications</td>
<td>$22,440</td>
<td>$33,660</td>
<td>+50%</td>
</tr>
<tr>
<td>Partner Ad/ID in Student Affairs Email Communications</td>
<td>$2,615</td>
<td>$5,231</td>
<td>+100%</td>
</tr>
<tr>
<td>Partner Ad/ID in Performing Arts Email Communications</td>
<td>$2,693</td>
<td>$5,386</td>
<td>+100%</td>
</tr>
<tr>
<td><strong>CSULB WEBSITES</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rotating Banner Ad/ID on 49er Shops Website</td>
<td>$19,837</td>
<td>$19,837</td>
<td></td>
</tr>
<tr>
<td><strong>SOCIAL MEDIA INTEGRATION</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partner Message to University Social Media</td>
<td>$9,220</td>
<td>$9,220</td>
<td></td>
</tr>
<tr>
<td>Partner Message to Athletics Social Media</td>
<td>$940</td>
<td>$940</td>
<td></td>
</tr>
<tr>
<td><strong>PARTNER ACTIVATION/EVENT INTEGRATION</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partner Activation/Integration at Athletics Events</td>
<td>$8,500</td>
<td>$17,000</td>
<td>+100%</td>
</tr>
</tbody>
</table>
In this instance, the baseline package has been compared to a sample opportunity for a consumer brand, which assumes that the partner will be interested in maximizing its exposure with a variety of CSULB audiences. In order to avoid over-branding events, the amount of signage has remained consistent, however the value of Performing Arts and University Communications advertising has increased, as have Direct Mailers, Digital Communications and Activation, through increased frequency or partner expenditure with its intended audience. Correspondingly, the overall value to the partner has increased by 49 percent.

CSULB should exercise its best judgment when packaging assets for each partner and category, taking into consideration available partner inventory, revenue potential and alignment with partner objectives.

Following RFP issuance and response from bidders, CSULB should enter into negotiations with potential winning bidders to fine tune the partnership package. Doing so has the following effects:

- Increases perceived value of the package to the prospective partner.
- Streamlines the partnership offering to facilitate implementation.
- Showcases CSULB’s interest and attention to partner’s goals and objectives.
9.0 Category Review

As discussed in the Operational Guidelines section, the key to generating the greatest revenue possible from a campus partnership program is tying the program to campus spending. Identifying areas of significant spending, therefore, is an essential part of establishing direction for development efforts.

- Increases appeal of the program to potential partners because of revenue ties.
- Opens categories of business that might not typically participate in partnership programs.

While the definition of "significant" spending can vary between campuses, establishing a benchmark of over $450,000 in a specific category of business provides a useful starting point. Additionally, because spending comes from multiple different areas, it is critical to examine all outgoing streams to ensure maximum revenue potential, including:

- Administration and Finance
- P-Card Expenditures
- Auxiliaries

Uncovering and then leveraging spending from these sources is often a monumental task. The effort to do so, however, leads directly to generating maximum revenue possible from corporate partnerships. As a result, every effort should be made to incorporate the widest possible breadth of campus spending from targeted categories.

9.1 Category Prospects

Spending information is supplied from several sources:

- Long Beach State Procurement (from CSU system’s CalUSource analytics software)
  - University payments 2017 – 2019
  - NOTE: includes P-card spending
- 49er Shops
- Spending Data 2018-19

We recognize this listing is not comprehensive. Rather, these categories are meant to provide insight into how aggregating University spending can be used to create leverage in developing partnerships. Lastly, these categories (and the businesses represented in each) may be subject to negotiated discounts and/or other commitments that are unknown at this time. As such, the value of a campus partnership program must be balanced against the existing value and benefits of various agreements.
<table>
<thead>
<tr>
<th>Category</th>
<th>Vendor/Partner(s)</th>
<th>Annual Avg Spending</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building Supplies</td>
<td>Numerous</td>
<td>$435,726</td>
<td>Home Depot, Grainger and Montgomery are primary.</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>Staples is dominant (90%)</td>
<td>$959,671</td>
<td><em>NOTE: CSULB is doing a solid job in leveraging System negotiated pricing with Staples.</em></td>
</tr>
<tr>
<td>Furniture – Office, Other,</td>
<td>Kreuger Intl, Tangram Interiors, Crider Contract are dominant.</td>
<td>$2,533,111</td>
<td>Likely not all vendors can address all needs. Regardless, worthy of further audit to determine potential efficiencies and leverage points.</td>
</tr>
<tr>
<td>Classroom</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hotel</td>
<td>Multiple (Marriott, and Hilton are primary)</td>
<td>$1,055,492</td>
<td><em>NOTE: no details provided by Shops.</em></td>
</tr>
<tr>
<td>Air</td>
<td>Multiple (Southwest, Jet Blue and United are primary)</td>
<td>$663,133</td>
<td><em>NOTE: Shops does not provide any details on air travel.</em></td>
</tr>
<tr>
<td>General Operating Supplies</td>
<td>Numerous – Amazon, Grainger and McMaster.</td>
<td>$842,545</td>
<td>Amazon is 53%. No specifics on purchase details.</td>
</tr>
<tr>
<td>Laboratory Supplies</td>
<td>Several (Thermo Fischer is dominant with roughly 74%)</td>
<td>$622,668</td>
<td><em>NOTE: non-traditional category and strong opportunity for student value-add components.</em></td>
</tr>
<tr>
<td>Computer Hardware – desktops,</td>
<td>Many including AT&amp;T, Microsoft, Apple, Dell</td>
<td>$4,039,530</td>
<td>Covers many areas and not all vendors can address all needs. Regardless, worthy of further audit to determine potential efficiencies and leverage points. Does not include $2.4MM with 49er shops with Apple and Dell. <em>NOTE: strong opportunity for student value-add components.</em></td>
</tr>
<tr>
<td>laptops, tablets, servers, IT</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Network, Peripherals.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Software (includes Application</td>
<td>Numerous including Impex, Planon, SHI, Comcast, DLT, D2L, Winchester, Thoma</td>
<td>$2,768,561</td>
<td>Covers many areas and not all vendors can address all needs. Regardless, worthy of further audit to determine potential efficiencies and leverage points. <em>NOTE: strong opportunity for student value-add components.</em></td>
</tr>
<tr>
<td>Consulting &amp; support services,</td>
<td>Cressey.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Backup/Archival, Content</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Management, CRM, Database mgmt,</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Educational, VPN, and Other IT</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>software &amp; support.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td>Vendor/Partner(s)</td>
<td>Annual Average Spending</td>
<td>Notes</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-----------------------------------------------</td>
<td>-------------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Janitorial Service and Supplies</td>
<td>Numerous including Cevac, Waxie, Unisan and others.</td>
<td>$635,424</td>
<td>Non-traditional category. <strong>NOTE:</strong> possible opportunity for system-wide approach.</td>
</tr>
<tr>
<td>Telecom, Mobile Communications, Telecom Equipment and Support</td>
<td>Numerous including Frontier, AT&amp;T and Verizon.</td>
<td>$1,452,083</td>
<td>Likely not all vendors can address all needs. Regardless, worthy of further audit to determine potential efficiencies and leverage points. <strong>NOTE:</strong> strong opportunity for student value-add components.</td>
</tr>
</tbody>
</table>

Each of the categories of business identified represents a prospective partnership opportunity. To determine which categories should be pursued, several factors should be considered:

- Length of current contract
- Category competitiveness (i.e. presence of who will bid on business)
- History of successful RFP in the category
- For categories with multiple vendors (e.g. furniture, software, telecom) determine capability of integrating into a single business offering.

A few key observations on this data:

- Some spending categories do not detail specifics. This is especially the case in the data from 49er Shops (e.g. Amazon, Building Maintenance). These are potentially high dollar categories and worthy of further audit to determine viability. Additionally, worth delving deeper into these to determine what is being spent on Amazon; State spending includes more than $565,000 annually with Amazon (including $430,000 for General Operating Supplies) and Shops has an additional $67,600 with no category identified.
- While construction and engineering are by far the highest expense categories on the campus, the complexity of the category (state contracts, proliferation of sub-contractors) make it more arduous for partnership development. That said, and once we have initial success examples for other categories, we believe construction is worthy of pursuit – potentially in alignment with other campus entities such as Alumni and Development. This may create additional value-adds for students, especially for mechanical engineering majors.
- Finally, there may be solid strategic rationale why CSULB is aligned with certain vendors, partners and suppliers (e.g. owned by key alums and/or donors). As such, we strongly suggest a holistic approach to prioritizing partnership categories.
10.0 Projections

Evaluating the revenue potential of a campus partnership program takes into consideration several variables.

**Internal**

- Aggressive pursuit of a vendor-based partnership model that leverages campus spending and the RFP process.
- Participation of key campus stakeholders including Athletics, Student Affairs, Alumni and Development, and Auxiliaries, with possible future participation of Associated Students and others.
- Staff and resource commitment required for coordinating, acquiring, and activating campus partnerships.
- Effective campus communication to ensure broad acceptance and adoption of a campus partnership program.

**External**

- Continued growth of the US economy, the higher education sector and related marketing expenditures.
- Continued growth and evolution of campus marketing programs in general.

Value projections related to a campus partnership program are primarily based on the amount of business being delivered to a partner, not the market value of assets contained in a sponsorship package.

- Package uncertainty: Each partnership package will first be developed based on the assumed needs of the category, and then ultimately adjusted based on the specific, negotiated needs of the Winning Bidder.
- Experience: The negotiated value of the most partnerships is predicated on the business potential. Partnership assets are largely (though certainly not exclusively) seen as a required part of the partnership.

The exception to this rule concerns facility naming, which has substantial perceived value. As a result, the greater the amount of business the University can package with a partnership program, the greater the value of that program.

With this in mind the following pages present several revenue projections for a campus partnership program. To build these projections, we considered two major variables:

- Percentage of University Spending Dedicated to a Partner: The amount of category business that can be dedicated to a sponsor (50%, 75%, 100%)
- Assumed Value of Dedicated Spending: A baseline value assigned to determine a minimum partnership investment (10%, 15%, 20%)

Lastly, 5 different business examples are provided to build a sense of revenue potential.

- Business-to-Consumer: Hotel, Air travel
- Business-to-Business: Telecom, Furniture, Laboratory Supplies
### Annual Sponsorship Baseline Value Pegged at 10% of Dedicated Business

<table>
<thead>
<tr>
<th>Category/Business</th>
<th>Estimated Category/Business Value</th>
<th>Dedicated Business 50%</th>
<th>Dedicated Business 75%</th>
<th>Dedicated Business 100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel</td>
<td>$1,055,492</td>
<td>$527,746</td>
<td>$791,619</td>
<td>$1,055,492</td>
</tr>
<tr>
<td>Air Travel</td>
<td>$663,133</td>
<td>$331,567</td>
<td>$497,350</td>
<td>$663,133</td>
</tr>
<tr>
<td>Telecom</td>
<td>$1,452,083</td>
<td>$726,042</td>
<td>$1,089,062</td>
<td>$1,452,083</td>
</tr>
<tr>
<td>Furniture</td>
<td>$2,533,111</td>
<td>$1,266,556</td>
<td>$1,899,833</td>
<td>$2,533,111</td>
</tr>
<tr>
<td>Laboratory Supplies</td>
<td>$622,668</td>
<td>$311,334</td>
<td>$467,001</td>
<td>$622,668</td>
</tr>
</tbody>
</table>

### Annual Sponsorship Baseline Value Pegged at 15% of Dedicated Business

<table>
<thead>
<tr>
<th>Category/Business</th>
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<td>$622,668</td>
</tr>
</tbody>
</table>

### Annual Sponsorship Baseline Value Pegged at 20% of Dedicated Business

<table>
<thead>
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<th>Estimated Category/Business Value</th>
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<th>Dedicated Business 100%</th>
</tr>
</thead>
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<td>$467,001</td>
<td>$622,668</td>
</tr>
</tbody>
</table>
Using these values, three different revenue projection scenarios are presented in Figure 5.

- **Low Projection (Conservative):** Majority of deals at 10% value baseline, estimate 1 deal per year.
- **Medium Projection (Moderate):** Majority of deals at 15% value baseline, estimate 2 deals per year.
- **High Projection (Aggressive):** Majority of deals at 20% value baseline, estimate 3 deals per year.

*It is important to emphasize the following as you review these projections:*

- The following projections are contingent on which categories are analyzed.
- Based on State and 49er Shops data, there are a *great many more* which could have been evaluated.
- Replacing one or more of these categories would alter the projections.
- As such, we strongly encourage maintaining this awareness when reviewing this data.
Figure 5: Revenue Projections for Campus Partnership Program
10.1 Alternative Forms of Value

Generating new revenue from companies that do business with CSULB is the primary objective of the corporate partnership program. The benefit to the university and its constituent populations, however, is not limited to revenue. In fact, alternative forms of value from corporate partnerships can play an instrumental role in gaining acceptance and adoption of these partnerships.

These benefits can be added to an asset program and during the negotiating process with prospective partners.

Faculty/Staff Specific Benefits

- **Product/Service Discounts**: Creating a purchase incentive for faculty and staff with discounts on partner products/services produces a tangible benefit that is commonly used.
- **Product/Service Rebates**: Partners can provide a financial incentive for faculty and staff to purchase products/services that ultimately further benefit CSULB. For example, when faculty and staff purchase products from a partner, a pre-determined percentage of the purchase price is rebated to CSULB and related programs.

Student Specific Benefits

- **Internships**: Partnerships can be constructed to include specific internship opportunities for CSULB students.
- **Scholarships**: A partnership requirement can be providing funds for designated scholarship programs.

While discounts and rebates for products and services can be targeted toward students as well, there can be sensitivity to directing students to make purchases on items that may produce financial pressure. As such, purchase incentives of this nature should be considered on a case-by-case basis.
11.0 Implementation

A business development approach that integrates the campus partnership program into a public bidding approach (via RFP) has the greatest financial potential for CSULB. This approach focuses on creating a campus partnership program that delivers both direct and indirect business opportunities.

- Direct business: Campus spending directed to the business as a result of the partnership.
- Indirect business: Opportunities for the partner to generate additional revenue (on-campus sales, account development, etc.) through different marketing initiatives.

Multiple CSULB departments must collaborate to deliver the direct and indirect business opportunities required for a successful campus partnership program.

- Direct Business: CSULB is required to submit an RFP for business contracts surpassing $50,000. Purchasing and Business Contracts are the required departments.
- Indirect Business: Because they have access to (and communicate with) different campus populations, Alumni, Athletics, and Student Affairs all provide indirect business opportunities.

Other campus departments (e.g. housing and Associated Students) may also provide direct and indirect business value, but their involvement increases the size and complexity of the program. Integrating these departments at a later time (following program launch) is suggested. Because it involves multiple campus departments and publicly reviewable documents, implementing a campus partnership program of this type requires a clearly defined structure.

To drive maximum possible revenue from a campus partnership program, a close, transparent relationship with purchasing and strategic sourcing is crucial. By leveraging planned campus spending into participation in a campus partnership program, CSULB will generate partnership revenue from categories not normally associated with campus marketing.

Several steps are recommended to establish a cooperative relationship with Purchasing/Strategic Sourcing.

1. Define Revenue Potential of Campus Partnerships: Showcase financial potential of a campus partnership program that is coordinated with Purchasing/Strategic Sourcing.
2. Identify Purchasing/Strategic Sourcing Role in Campus Partnerships: Provide examples of how Purchasing/Strategic Sourcing can support campus partnerships by embedding related programs into instruments like a RFP.
3. Identify Existing and Planned Campus Spending: Identify major campus expenditures (both single business and categories) that can benefit from integrating campus partnerships.
4. Develop RFP Integration: Collaborate to ensure that campus partnership content inserted into an RFP (or similar instrument) meets CSULB legal requirements.
Adding other CSULB departments to the campus partnership program can add value, but also increases complexity. Use the following questions/criteria to determine if a department should be added to a campus partnership program.

- Does the department provide access to a new/different stakeholder group?
- Does the department have effective means (assets) for reaching members of the stakeholder group?
  - If so, has the department assigned a value to its assets? How does it compare to other program assets? Is there a cost associated with ‘activating’ an asset? (I.e. how much will it cost to integrate a partner?)
  - If not, how does the department recommend that partner access its stakeholders?
- Lastly, what are the department's expectations for participating in the campus partnership program?

This structure calls for multiple departments to commit to the success of a campus partnership program by providing access to value in the form of assets and entitlements. Unsurprisingly, each of these departments has their own reporting structures, objectives, goals, and priorities. As a result, a clearly defined management structure is essential to implementing an effective and efficient campus partnership program. This includes two distinct components:

<table>
<thead>
<tr>
<th>PROGRAM OVERSIGHT</th>
<th>PROGRAM OPERATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oversight of campus partnership program</td>
<td>Day-to-day program operation</td>
</tr>
<tr>
<td>Engage with campus stakeholders</td>
<td>Engage with program stakeholders</td>
</tr>
<tr>
<td>Set program objectives and goals</td>
<td>Oversight of sales process</td>
</tr>
<tr>
<td>Issue resolution (internal)</td>
<td>Oversight of partnership activation</td>
</tr>
<tr>
<td>Reports into Chief Financial Officer</td>
<td>Issue resolution (external)</td>
</tr>
</tbody>
</table>

Oversight of the campus partnership program oversight should fall under the VP Admin and Finance’s purview. In the initial phases of implementation, Program Operation can assign to existing resources:

- Procurement: Bid management
- ASC: Partnership contracts (as required/applicable)
- Alumni and Advancement: Partnership activation and relationship management

Ultimately, however, the success and maturity of the partnership program will require greater resources to implement effectively. Specifically, CSULB will need to create a separate and distinct organization that owns responsibility for the program.

This organization will play a multidisciplinary role on campus to implement the partnership program by engaging with all program stakeholders.

Both UC Berkeley’s University Partnership Program and UC Davis’ University Preferred Partner Program provide relevant templates for an internal resource and staffing dedicated to campus partnerships.
Athletics will certainly play a role in some of the campus partnerships. As such, Program Management will need to work with Athletics to secure those assets for campus partnerships.

CSULB should negotiate preferred rates for access to assets it seeks to incorporate into campus partnership programs. Discounted rates are common in agency relationships where one department or organization brings business to another. Pre-negotiating discounted rates prior to going to market with a campus partnership program will streamline the process (as opposed to case-by-case negotiation).

### 11.1 Integration into System-Wide Partnerships

Concurrent to CSULB considering implementation of a campus partnership program, the CSU System is moving forward with its own corporate partnership program.

The CSU System program will leverage the economic power of the System in combination with providing unique marketing access to participating CSU campuses. Individual CSU campuses will be able to determine if they want to participate in CSU System partnerships on a category-by-category basis.

The CSU System has identified several categories to pursue for partnership opportunities. These categories were selected due to their revenue potential and relative lack of conflict at the individual campuses. Targeted categories include:

- Airlines
- Hotels
- Express Shipping
- Financial Services

Long Beach State is encouraged to participate in CSU System partnerships as the university doesn’t yet currently generate substantial revenue in these categories. That said, thoughtful consideration is suggested specifically comparing CSULB-specific benefits (both financial and value-add to students) to possible system-wide value as this will be needed to determine maximum value.
12.0 Recommendations and Next Steps

Several trends are favorable to the success of a campus partnership program at Long Beach State.

- **Precedent (Internal):** While modest, some of the existing partnerships (e.g. through the University Library and Shops) indicate openness to third party alignments.
- **Precedent (External):** Marketers are seeking new ways to connect with campus beyond athletics, as exemplified by the growing number of integrated campus partnerships.
- **Support (Internal):** CSULB has made significant headway in laying the groundwork for broad support of campus corporate partnership program.
- **Support (External):** The CSU system is actively supporting campus efforts to generate partnerships.
- **Economics:** The continued growth of the US economy gives businesses the ability to commit resources to marketing budgets. An increasingly competitive marketplace is driving record numbers of students to apply to multiple colleges and universities, specifically California-based institutions.
- **Financial Potential:** Mid-range estimates suggest that a campus partnership program could produce high-six to low seven-figures annually by year five of program adoption.

Due to these factors, it is strongly recommended that CSULB move forward with a comprehensive campus partnership program.

To begin the process of launching a campus partnership program, the following initial steps are recommended:

- **Review Report Findings:** Begin review of this report, secure input from required parties, and making revisions/address questions as necessary.
- **Define Use of Revenue:** Clearly define how revenue from a corporate partnership program will be used.
- **Assign Responsibilities:** Identify on-campus resources required for implementing the program, including program oversite, partner development/sales, and partnership management. Can include both internal and/or external resources. Additionally, identify liaisons at campus departments participating in/involved with the program.
- **Develop Communications Plan:** Create a strategic communications plans that outlines the goals, objectives, and expected benefits of the partnerships program for campus stakeholder groups including students, faculty, staff, alumni, and others as deemed as necessary.
- **Prioritize Categories:** Based on contract lengths and revenue potential, identify categories of business to pursue for partnership development.
Appendix 1: Unrelated Business Income Tax

Unrelated business income tax (UBIT) must be considered when creating a campus partnership program.

As a nonprofit educational organization, the University is free from most taxation constraints. Implementing a partnership program, however, can be considered as falling outside the core mission. As a result, revenues derived from the program may be subject to UBIT. There are nuances to UBIT regulations that, if sufficiently addressed, allow the University to pursue a partnership program without incurring tax penalties.

One of the greatest frustrations for nonprofit organizations dealing with corporate partnerships is the nebulous nature of UBIT. The Taxpayer Relief Act of 1997, however, alleviated some confusion by including language specific to partnerships and sponsorship. The law addresses the debate between the IRS and non-profit groups over sponsorship income by specifically illustrating differences between advertising (taxable) and recognition (non-taxable) program components.

Perhaps the most significant benefit is the ability to “segment” a sponsorship program. Prior to 1997, sponsorships of nonprofit organizations were divided into two broad categories: recognition and advertising. Those sponsorships identified as recognition-oriented were not taxable, those identified as advertising-oriented were taxable. Additionally, if even a single segment of a sponsorship program was classified as advertising, then the entire program was taxable (a concept known as “tainting”).

**Recognition (Non-Taxable)**

- Use of sponsor logo and/or slogans;
- Details regarding sponsors products and information including brands and trade names, *provided no comparisons or qualitative descriptions are made*;
- Display of the sponsor’s location, telephone numbers, web addresses or other contact information;
- Displays or representations of sponsor products and services;
- Sampling or other product distributions. These can be free or for-fee distributions.

**Advertising (Taxable)**

- Use of qualitative or comparative language about a sponsor’s products and services;
- Information about the price of a sponsor’s product or service;
- An endorsement. This does *not* include designations such as “official product of the University”;
- Any discounts or promotion designed to specifically enhance sales of sponsor products and services.

With adoption of the TRA, however, each segment of a sponsorship program can be classified as either recognition or advertising. Properties are only required to pay tax on those segments that fall under the advertising classification.

There are specific benefits that can, when provided to a partner or sponsor, create UBIT concerns. These can include:
• Advertising: Distinct from recognition. Involves content that makes explicit comparisons to competitor products and/or pricing information.

• Exclusive provider arrangements: Using the RFP process plays an important role in avoiding exclusive provider arrangements. Furthermore, use of language such as “prominent and dominant” rather than “exclusive” provides further protections. However, the IRS clarified in April 2019 that income from exclusive sponsor arrangements is not considered unrelated business.

• Goods, facilities, services and other privileges: because the partnership is part of a formal RFP process, access to University facilities, goods and services is pre-negotiated.

• Exclusive or non-exclusive rights to use a tax-exempt organization’s logo: as use of marks is part of nearly every partnership, careful consideration should be given to how this is applied. However, with broad use of college IP in marketing, enforcement is unlikely.

Example 1

• University enters into a multi-year sponsorship agreement with a soft drink vendor to be the exclusive provider of soft drinks on campus in return for an annual payment.

• If the company agrees to provide, stock and maintain on-campus vending machines as needed (leaving little or no obligation on the university’s part to perform any services or conduct activities in connection with the enterprise), and receive broad recognition around campus (without making comparisons to competitor products) the University should be exempt from UBIT-related taxation.

Example 2

• University enters into a multi-year sponsorship with a computer company under which the company will be the exclusive provider of computers to a Student Union and other affiliated Auxiliary services.

• If the University, as part of this agreement, agrees to perform various services, assists in developing marketing plans or participates in joint promotional opportunities, these activities may constitute an infringement on the University's tax-exempt status and could therefore be subject to taxation.

Example 3

• University enters into a multi-year agreement with a transportation network company, through which the company will wholly subsidize a ride sharing program on campus, rendering the program cost-free for students and the university to participate. A portion of each ride through the program is donated to advancement.

• The University agrees to designate the company as the “Exclusive Sponsor” of the campus ride sharing program, with associated sponsorship benefits, rights and activities recognizing the company on university assets promoting the program (signage, advertising, internal messaging, etc.). However, the university community is free to select any TNC service it desires for rides to and from campus.

• As is, this structure does trigger UBIT-related taxation. However, if the University or the partner attempted to prevent access to the campus by partner competitors, or simply designated the partner as an “Exclusive Provider” of ride sharing services, the IRS would be likely to consider partner revenue to be unrelated business and therefore taxable.
In short, any activity that is perceived as actively engaging the University on behalf of the sponsor’s business interests or providing a not insubstantial benefit to the sponsor may be considered taxable under UBIT.

- Example: CSU Dominguez Hills’ Athletic Department is sponsored by Marriott. As part of the sponsorship, CSUDH actively promoted Marriott to visiting teams as the preferred hotel. As a result, CSUDH incurred a 21% tax on associated sponsorship revenues.

That said, the information presented in this section is meant only to serve as a general guideline regarding UBIT. It is meant to heighten awareness regarding the issue and should by no means be considered conclusive.

If questions or issues regarding taxation arise during the course this project, they should be directed to University taxation resources and/or counsel. For transparency, each institution should also actively document its interpretation of relevant IRS statutes and how they apply to specific opportunities when implementing a partnership program.