

1. Assessment Plan - Four Column



PIE - President: Foundation Office

Where We Are Now: Analysis and Summary

2018-19

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External Conditions, Trends, or Impacts: We are working to build a "culture of giving" among the alumni population. This is an understandably slow process, particularly when you consider that in the history of the College, it is only in the last few years that we have engaged and solicited the entire base. People are noticing that they are getting multiple touches from the college including appeals for financial support numerous times a year. Inaccurate demographic information continues to slow this process. We are more and more supplementing our mass outreach with social media tools such as Facebook and LinkedIn.

Internal Conditions, Trends, or Impacts : For 2018-19

Space continues to impact us in a negative way. The Foundation offices are spread across campus. For a small team like ours, this creates challenges. Having a dedicated space where all the staff is together would help. On top of that, we just don't have enough space to manage our day to day activities. There's not enough storage space in our office. Boxes and supplies are out in the open which doesn't create an inviting environment for donors and guests. It is also a potential safety hazard. We don't have a dedicated work room and will often have to "borrow" space from campus partners. The same is true when it comes to conference room space for meetings of the Foundation Board and its committees. We are often at the mercy of other groups across campus whose spaces we have to utilize.

We also occasionally hear from corners of campus, including some high level leaders at the college, that there is a lack of understanding of the what the Foundation does. There is also a perception in some corners that most of the money we raise goes to athletics and that the Foundation only works to support itself. These statements are not an accurate reflection of the mission or the function of the Mt. SAC Foundation & Alumni Association.

To address some of these issues we enlisted the support from an outside firm, specializing in brand management and social media strategy. Their initial survey of the donor/alumni/campus community base confirmed what we believed to be true. We have retained their services to help with branding and education.

Critical Decisions Made by Unit: 1. We continue to try to meet with the accountant 2-3 times a month.

2. We hired a part-time bookkeeper to assist with the day-to-day practices.

3. We hired a part-time administrative assistant (29hrs) to support the Foundation team.

Notable Achievements for Theme A: To Advance Academic Excellence and Student Achievement: The Foundation is operating at a higher level than it has before and our performance reflects that. Over the last two fiscal years we have raised over one million dollars each year.

-Increased number of donors and gifts

- Grew the Alumni Association by another 300 alumni. This was a 30% increase
- More than doubled the number of campus employees supporting the college with their philanthropy
- Created the first program endowment with a gift from the Orange County Farm Bureau
- With a gift from the Communication Department established a department endowed fund

There is an interesting example of a student success story through the Foundation. Ashley Lopez was hired through the student internship program two years ago, while finishing her accounting degree while helping with bookkeeping practices in the Foundation. We hired her after graduation in 2017 on a part-time basis because her performance was so strong.

Notable Achievements for Theme B: To Support Student Access and Success: -Awarded more than \$430,000 in scholarship money to 400 + students including an additional 20 brand new scholarships

- Brought 550 students from underserved communities to the Planetarium for the Reach for the Stars program
- Worked with the REACH program to secure a \$30K gift to support the program
- Secured the \$80K to send the Chamber Singers to perform in the World Choir Games in South Africa
- We raised nearly \$25K for the DREAM program and undocumented students

Notable Achievements for Theme C: Secure Human, Technological, & Financial Resources: -Increased number of donors and gifts

- Grew the Alumni Association by another 300 alumni. This was a 30% increase
- More than doubled the number of campus employees supporting the college with their philanthropy
- Created the first program endowment with a gift from the Orange County Farm Bureau
- With a gift from the Communication Department established a department endowed fund

Notable Achievements for Theme D: To Foster an Atmosphere of Cooperation and Collaboration: We partnered with many departments/programs across the campus for specific projects, including:

- Relaunched the Golden Notes membership society with several different membership levels and corresponding benefits
- Expanded the focus of the President's Breakfast program
- Continued to grow the relationship with the Hollywood Foreign Press Association, building stronger relationships with them and their grantee organizations to provide opportunities to Mt. SAC students

Contributors to the Report: Marisa Fierro

<i>Unit Goals</i>	<i>Resources Needed</i>	<i>Where We Make an Impact: Closing the Loop on Goals and Plans</i>
<p>Infrastructure Goal - Establish infrastructure to support engagement and fundraising priorities.</p> <p>Infrastructure Related Goal: Cataloging Requests for Foundation Support</p>	<p>Request - Full Funding Requested - Request the District assume the salary and benefits cost of Administrative Services Specialist classified position.</p> <p>Describe Plans & Activities</p>	<p>Reporting Year: 2017-18 % Completed: 25</p> <p>Received \$30K toward the salary and benefit cost. An additional \$70K is needed to cover the full cost of this position. (05/30/2018)</p>

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In an effort to more effectively manage workflow and priorities, we will develop an internal process for managing requests. Part of that will be to have a set of policies and procedures that define our role and set reasonable expectations for our campus partners. These will govern four main areas:

1. Department Events where the Foundation assists in a substantial way
2. Managing accounts for campus programs. This will include defining a fee policy that contributes to the Foundation’s operating expenses.
3. Gifts-in-Kind
4. Distinguishing between “fundraising activities” managed directly in partnership with the Foundation Office versus “fundraising events” where proceeds are deposited into “83” Accounts managed by Fiscal Services
 - a. Fundraising Activities involve the Foundation directly and typically require a higher level of involvement with the campus partner, either directly with potential donors or as a resource on how to cultivate, solicit or steward a gift to the college.
 - b. Fundraising Events are approved by the Foundation through an existing process but are not managed directly by the Foundation. The policy will guide campus partners on what are acceptable activities but will also help distinguish between an event and a direct solicitation of a

Supported (Justification of Need):
Salary and benefits cost of Administrative Services Specialist classified position.

Lead: William Lambert

What would success look like and how would you measure it?: The transfer of the salary will allow the Foundation office to conduct more work for the college.

Type of Request: STAFFING: Requests for permanent employee positions or temporary/hourly employees.

Planning Unit Priority: High

On-Going Funding Requested (if applicable): 96000

Request - Full Funding Requested - Foundation requests the current Development Services Assistant position be a FT benefits eligible classified position.

Describe Plans & Activities

Supported (Justification of Need):
FT benefits eligible classified position would focus on day-to-day bookkeeping practices, Quickbooks maintenance, Raiser's Edge database gift entry, maintenance of donor records, event logistics and execution, processing acknowledgment letters and coordinating golf tournament.

Lead: William Lambert

What would success look like and how would you measure it?: Current levels of success would not be maintained without this support and certainly no growth would be possible.

Reporting Year: 2017-18

% Completed: 0

This request has not been filled. (09/05/2018)

<i>Unit Goals</i>	<i>Resources Needed</i>	<i>Where We Make an Impact: Closing the Loop on Goals and Plans</i>
<p>gift. Status: Active Goal Year(s): 2016-17, 2017-18, 2018-19, 2019-20 Goal Entered: 05/30/2018</p>	<p>Type of Request: STAFFING: Requests for permanent employee positions or temporary/hourly employees. Planning Unit Priority: High Documentation Attached?: No On-Going Funding Requested (if applicable): 70000 Request - Full Funding Requested - A home to call our own. Four offices, three work stations, conference room and appropriate storage space are needed and appropriate furniture and equipment including audio visual equipment for the conference room. Describe Plans & Activities Supported (Justification of Need): Being spread across the campus does not lend itself to the Foundation being as effective as it could be. We need a location on campus that provides enough space for staff and managers to be together. Lead: William Lambert What would success look like and how would you measure it?: Would have appropriate office space to house the Foundation Team. Type of Request: FACILITIES: This section includes minor building improvement projects and alterations to specific rooms or operational areas. Planning Unit Priority: High One-Time Funding Requested (if applicable): 150000 Request - Full Funding Requested - New 2020 Club Car Transporter 6-Passenger (Electric)</p>	<p>Reporting Year: 2018-19 % Completed: 75 The foundation team will be moving into the new office space at the end of the Fall 2019 semester. (07/16/2019)</p>

Unit Goals

Resources Needed

Where We Make an Impact: Closing the Loop on Goals and Plans

Describe Plans & Activities

Supported (Justification of Need):

Cart will provide assistance to guests, access for staff across campus and ability to transport items for events.

Lead: William Lambert

What would success look like and

how would you measure it?: Club Car

designated for the Mt. SAC Foundation operations, allowing the staff to welcome external guests to campus, provide tours and transport supplies across campus for events.

Type of Request: NON

INSTRUCTIONAL EQUIPMENT:

Tangible property with useful life of more than one year, other than land or buildings improvements, equal and over \$500 per individual item. Used for administrative or non-instructional purposes.

Planning Unit Priority: High

Documentation Attached?: Yes

One-Time Funding Requested (if applicable): 14853

Relationship Management -

Enhanced Stewardship. Thanking donors for their support is essential. Stories of impact, personalized acknowledgments, strategic engagement opportunities are all examples of higher levels of donor stewardship beyond basic receipts and acknowledgment letters. These are relationship advancing steps that serve as cultivation for potential future gifts. The Foundation has incorporated these approaches over

Unit Goals

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Where We Make an Impact: Closing the Loop on Goals and Plans

the past several years and will continue to do so.

Foundation Board Development:
Create transitional spaces for current board members to "land" when their terms expire. Launch Emeritus and Advisory Committees. Recruit additional board members who have the capacity and inclination to make major investments in Mt. SAC programs and students.

Alumni/Community Outreach:
Targeted alumni outreach. Build community engagement efforts, partnering with public relations to engage surrounding communities in the district. Emphasize that Mt. SAC is their community college also. Expand and enhance the tools (social media) we use to reach out and engage our multiple constituencies.

Targeted engagement of Advisory Boards: A number of our Advisory Boards across campus are operating at a high level. Introducing fundraising as a part of the mission of these boards is a long-term objective.

Status: Active

Goal Year(s): 2018-19, 2019-20

Goal Entered: 07/16/2019

Fundraising Goal - Continue to develop the fundraising operation at Mt. SAC with a focus on expanded annual fund, major and planning gifts:

Annual Giving: Execute standard

Unit Goals

Resources Needed

Where We Make an Impact: Closing the Loop on Goals and Plans

annual giving solicitations to retain current donors and acquire new donors. Primary objective is to get current donors to renew their support--especially donors whose first gift to the Foundation was 1-2 years ago. For donors whose giving history is more consistent and long term, the emphasis is on asking them to upgrade their annual gift. Continued focus on cultivating, stewarding and upgrading current donors as well as identifying new prospects for scholarship support. Implement the Foundation Board directive that all new annual scholarships meet the \$1,000 minimum and three year commitment.

Major Giving: Complete thirty-six major gift prospect face-to-face visits (MG prospects are those with the inclination and ability to make gifts of \$10K and above)

Planned Giving: Outreach to strategic prospects through direct mail and electronic communication. Build a Planned Giving Council that can advise the Foundation, donors and the campus community on issues surrounding retirement and estate planning and how to include philanthropy in those plans.

Employee Giving: We will continue to engage the campus community and encourage them to include Mt. SAC in their philanthropy. A key part of the

Unit Goals

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Where We Make an Impact: Closing the Loop on Goals and Plans

process is to help them understand how the Foundation functions and how it can be utilized to achieve their campus-wide philanthropic goals.

Retiree Cultivation: Evidence from across the nation shows that retired employees, if properly engaged and communicated to, are very generous in their support of the institutions where they built their careers. Across the CA CC system, some of the largest gifts we receive come from retired faculty and staff. We will develop a mechanism for engaging this special and unique population. We will plan campus events and activities that are exclusive to retirees and involve Mt. SAC leadership. We will enlist a volunteer and committee structure that is tied into the Foundation Board.

Heritage Hall: This campaign remains a constant and ongoing priority for the Foundation. We are working closely with current and retired athletics staff to identify, cultivate and solicit gifts for the building project.

Endowment Growth: Continue focus on Endowment Building Gifts - including naming opportunities in the Business and Technology Complex as well as the Athletics Complex. Creating operational endowments for programs is among the long-term objectives for the Foundation. With the opening of these new buildings

Unit Goals

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Where We Make an Impact: Closing the Loop on Goals and Plans

we have the chance to offer substantial stewardship opportunities for this type of gift. We are in the process of identifying prospects and developing materials to be utilized in gift conversations.

Status: Active

Goal Year(s): 2018-19, 2019-20

Goal Entered: 07/01/2019

Date Goal Archived/Inactivated:
06/30/2020