

1. Assessment Plan - Three Column



PIE - President: Foundation Office

<i>Unit Goals</i>	<i>Resources Needed</i>	<i>1. Where We Make an Impact: Closing the Loop on Goals and Resources</i>
<p>Infrastructure Goal - Establish infrastructure to support engagement and fundraising priorities.</p> <p>Infrastructure Related Goal: Cataloging Requests for Foundation Support</p> <p>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:</p> <ol style="list-style-type: none"> 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 	<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 Supported (Justification of Need): Salary and benefits cost of Administrative Services Specialist classified position.</p> <p>Lead: William Lambert</p> <p>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.</p> <p>Type of Request: STAFFING: Requests for permanent employee positions or temporary/hourly employees.</p> <p>Planning Unit Priority: High</p> <p>On-Going Funding Requested (if applicable): 96000</p> <p>Request - Full Funding Requested - Foundation requests the current Development Services Assistant position be a FT benefits eligible classified position.</p>	

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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 gift.

Status: Active

Goal Year(s): 2016-17, 2017-18, 2018-19, 2019-20

Goal Entered: 05/30/2018

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.

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

Planning Unit Priority: High

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

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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)

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

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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 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.

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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 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

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\$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 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

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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 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