COASTLINE
COMMUNITY COLLEGE

2015
Annual Department Review

Foundation

Table of Contents

Section 1: Department Planning:

Internal Analysis

While the Foundation Office as an entity is comprised of only three staff members (i.e., the Executive Director, and two full-time Staff Aides), the Office itself is part of a larger President's Wing which is comprised of Coastline's President's office; the Institutional Effectiveness, Research and Grants Office; and the Academic Senate.

Coastline's Foundation plays an important role in the life of the institution. It not only provides money for scholarships, but supports a variety of other programs at the college through money or services and serves as an important mechanism to raise the college's profile. The relationships it develops with donors, leaders in the community, and corporations contribute significantly to public awareness and appreciation of Coastline.

The unique nature of Coastline makes it more difficult for the Foundation to solicit donations, since we do not have any sports teams and a limited number of the other types of high-profile programs that typically prove attractive to donors. In this regard, Coastline's highly successful Art Gallery has proven to be a valuable asset to the college. The Foundation continues its focus on promoting awareness of the college while capitalizing on the uniqueness and location of the Newport Beach campus.

Coastline's Foundation has experienced some operational challenges during the past year. Continuing students who demonstrate a strong academic record and financial need are encouraged to apply for merit-based scholarships (also known as "internal scholarships") offered by the Coastline Community College Foundation.
The number of *internal* scholarships has grown by 31% over the past five years. This has significantly increased the workload of the Foundation who is responsible for coordinating the college scholarship initiatives; soliciting, determining student eligibility, awarding, and recording.

External scholarships are comprised of funds that students apply for and receive from an outside or external source not affiliated with Coastline Community College. These scholarships can be from a source in their community, religious organization, professional organization, or even their high school.

At one time, external scholarships went to admissions or financial aid for payment to the students. In January 2013 Coast District mandated that all external scholarships were to go through the Foundation for processing creating an added increase in the workload. The year 2013-2014 showed an exponential growth rate of 320% in these external scholarships which involve a tremendous amount of fiscal management, monitoring, reporting and student support.

Fiscal year 2014-2015 shows an additional growth rate of 21% from the year before. These particular scholarships require a significant amount of personal interaction and time with each of the recipients throughout the entire year.

It is impossible to project future growth because the added administrative burden put on the Foundation internal team has become too much.

Service Area Outcome(s)

SAO	ASSESSMENT MEASURE /TARGET
Build, support and grow community awareness of the Foundation.	**Measure:** Count of foundation events **Target:** Host three events annually
Provide additional resources for the college by conducting annual, capital and endowment campaigns.	**Measure:** Host endowment campaign **Target:** Raise an average of one million dollars a year
Advance scholarship awareness and resources.	**Measure:** Amount of scholarship money disbursed **Target:** Provide an average of 100,000 dollars in scholarships annually

While heavily burdened with additional administrative duties relating specifically to scholarships, the Foundation continued its focus this past year on raising awareness and growing financial support for the college. Student scholarships increased by 18% over last year!

The very first faculty/staff campaign was introduced to Coastline this past year. It was used in conjunction with a "soft opening" to the Newport Beach Campaign. Faculty and staff were offered the opportunity to donate to one of several college initiatives and for gifts of $2,000 or more, they were able to put their name on either a step or a classroom. The total for the three month long campaign was $57, 015! The next phase of the endowment involves the Foundation Board members. Within the next year, we hope to identify our first major donor of one million dollars or more.

During fiscal year 2014-2015, the Foundation held a total of four events involving the community. These included; a Holiday Reception, the third annual Orange County Global Women's Conference, a Donor Reception, and the annual Scholarship Ceremony & Reception. Each of these events offered opportunities to continue cultivation of college supporters and make new connections. This past year showed an increase of four new partnerships. It is not uncommon to recruit new board members from these community activities. This year we gained two new board members with strong ties to the Newport Beach Community.

Table 1.1 *Foundation Partnerships*

	2012-2013	2013-2014	2014-2015
Foundation Partnerships	• Asian & Pacific Islander American Scholarship Fund (APIASF) AANAPISI Scholarship Program: APIASF • Process Technology Program and Scholarships: Edison International; STEM Scholarship Program • AT&T • Comerica • Union Bank • Wells Fargo	• Asian & Pacific Islander American Scholarship Fund (APIASF) AANAPISI Scholarship Program: APIASF • Community Support Program: IKEA Costa Mesa • Edison International: STEM Scholarship Program • AT&T • Comerica: EOPS Program • Fountain Bowl: Scholarship • Rainbow Environmental • School's First: Scholarship • Union Bank • Wells Fargo	• Asian & Pacific Islander American Scholarship Fund (APIASF) AANAPISI Scholarship Program: APIASF • Edison International: STEM Scholarship Program • AT&T • Comerica: EOPS Program • Commonwealth Land Title • Fountain Bowl: Scholarship • Rainbow Environmental • RUCA : Art Gallery • School's First: Scholarship • SoCal Gas Company • Union Bank • US Bank • Wells Fargo • West Group Designs
Total	6	10	14

Revenue Sources	2012-2013	2013-2014	2014-2015
Foundation Revenue	$696,594	$995,595	$892,559**
Total	$8,893,298	$9,257,820	$10,912,583

Progress on Forward Strategy Initiative(s)

Table 1.2 *Progress* on *Forward Strategies*

Initiative(s)	Status	Progress Status Description	Outcome(s)
The Foundation will build new relationships with the cities, local businesses, and the Chambers of Commerce in the areas surrounding its learning centers; especially in Newport Beach as the Foundation embarks on its Newport Beach Capital Campaign.	Complete /Ongoing	Increased participation with local city chambers.	4 new board members from the community. Two of them are well connected with strong ties in the city of Newport Beach.
Foundation will build its fundraising efforts and increase the number of scholarships offered to Coastline students by 10%.	Complete /Ongoing	Increased external scholarships via greater corporation and foundation participation.	2013-2014: received $185K for both external and internal scholarships; 2014-2015: received $218K for both external and internal scholarships. Annual total=18% increase!
The Foundation will increase our net income 5% by focusing on the	In Progress	Fundraiser changing format. Actively seeking co-chairs	Recruited an "ambassador" for Oasis Senior Center

		for the N.B. Campaign. Building relationships and participating in community events in N.B. Taking advantage of speaking opportunities.	which will help increase awareness of CCC and donations to the NB Campaign. Creating new committees for Board member involvement.
Foundation's annual fundraiser, the N.B. Campaign, and hosting community events at Newport Beach, all of which provide publicity and promote awareness of Coastline Community College.			
Develop and sustain world-class development professionals and maintain relevancy in the field.	Complete /Ongoing	Staff maintains membership with online development associations, participates in annual CASE conference.	Staff participating in ongoing education opportunities via LYNDA and currently registered in job relevant courses at CCC and LBCC.
Strengthen scholarship operations to effectively meet demands.	Not Started	Not enough staffing!	Not addressed; no funds.
Learn SharePoint	In Progress	College is still researching SharePoint	ETA sometime in 2016. Will facilitate and
Effectively warehouse and maintain all supplies and materials.	In Progress	Need more storage space for large items. Especially before and after events.	In 2016 we begin collecting items with no place to store & prep for large auction.
Strengthen the Foundations social media presence	Complete /Ongoing	Tremendous social media surrounding conference. Engaging board of directors in F.A.F. "crowdfunding".	Social media is now being used as a fundraising tool while bringing added exposure and recognition to the college.
Establish a SharePoint webpage	In Progress	Waiting for SharePoint	ETA sometime in 2016

Section 2: Human Capital Planning

Staffing

Table 2.1 Staffing Plan

Year	Administrator	Management	F/T Faculty	Adjunct	Classified	Hourly
Previous year 2014-2015		Executive Director 1			Staff Aide 2	
Current year 2015-2016		Executive Director 1			Staff Aide 2	
1 year 2016-2017		Executive Director 1			Staff Aide 2	Scholarship Assistant 1

Staffing has remained the same while the Foundation assets have grown over the last 10 years from approximately $400,000 to over $2.5 million. As previously noted; In January 2013 Coast District mandated that all external scholarships were to go through the Foundation for processing creating an extraordinary increase in the workload. The year 2013-2014 showed an exponential growth rate of 320% in these external scholarships which involve a tremendous amount of fiscal management, monitoring, reporting and student support. The Foundation requires additional staffing in order to keep up with the

heavily burdened administrative functions, increased student interface and support necessary to service the scholarship program, and to enhance future growth.

Scholarship Support -Administrator

Coastline Foundation proposes creating a 1- year pilot program to hire a part-time hourly, Scholarship Administrator. Hiring a pilot position will allow for overtime cost savings and allow for better oversight, coordination and integration of other Foundation activities.

In addition to cost savings, and equally important, this new position will assist the Foundation with advancing their strategic plan goals, improving outcomes for the students and the college, and achieving efficiencies in the Foundation overall. In order to access the impact of the pilot position on increased ability to deliver on our mission, the Foundation will look to an increase in scholarships, partnerships, and total revenue in the following year department review.

Foundation Staff Aide

At Coastline, student success is a top priority. It is the mission of the Foundation to highlight college priorities by attracting philanthropic contributions; raising public awareness of the College's people and programs; and engaging current and former students, faculty, staff and friends to actively participate in the College's endeavors.

Donors prefer seeing their contributions go to scholarship and student programs rather than staff salaries. Currently one of the foundation staff positions is being supported by foundation funds. Switching this valuable position to general funds would free up an additional $80,000 to go directly to Coastline and its students. By way of PIEAC (Planning, Institutional Effectiveness and Accreditation Committee), Student Emergency Fund, and more Scholarships!

Professional Development

One of the Foundation goals/strategies is to develop and sustain world-class development professionals and maintain relevancy in the field. The college purchased the Lynda.com software and Foundation staff have already taken advantage of some of the trainings. In addition, Foundation staff are continuing their education and currently enrolled in classes at CCC and LBCC that are specifically relevant to their field.

Conference participation last year was paid in part by district professional development funding. The remaining portion was covered by foundation funds.

Name/Position	Professional Development	Outcome
Paula Coker	CASE Conference 9/17 - 19/2014	Current fundraising strategies
Ashley Lopez	CASE Conference 9/17- 19/2014	Current fundraising strategies
Mariam Khosravani	Lead On Conference for Women 2/22 – 25 /2015	Conference ideas

It is also important to note that Foundation staff each belongs to one or more email listserv for fundraising professionals. These are ongoing, online conversation about fundraising issues. It is an

opportunity to network, share ideas, ask questions, and build relationships with other development people in higher education.

The impact of these events is invaluable. Annual participation advances and supports the Foundation efforts by providing knowledge, standards, advocacy and training to strengthen our efforts in a variety of disciplines such as alumni relations, communications, fundraising and marketing.

Section 3: Facilities Planning

Facility Assessment

The overall work environment of the department is effective and aligns with the goals of the Facilities Master Plan, however, there needs to be a designated space for storage of event supplies and materials.

There is a need for the Foundation to have an easily accessible area for storage, given an increasing demand for event supplies from both within and from outside the Foundation. The development of a centralized storage location will ensure the area surrounding the Foundation offices is both organized and uncluttered. Nothing has been done to help secure storage space.

Section 4: Technology Planning

Technology Assessment

The acquisition and implementation of Raiser's Edge, Donor Management, and NextGen Scholarship Management software has provided the Foundation with valuable tools to save time and be more efficient, demonstrate accountability, and continue growth.

During the 2014-2015 year, the Foundation computers were upgraded to help accommodate the new software. The printers however, have not. There are two printers that need to be upgraded at this time. One is in the office of the Executive Director and the other is in the area designated for Foundation staff.

Section 5: New Initiatives

Initiative: Increase financial resources to advance student support services and increase opportunity for student achievement.

Describe how the initiative supports the college mission: This initiative will provide opportunities to increase access and success through new resources and scholarships through the Foundation.

What college goal does the initiative align with?

X Student Success ☐ Partnerships

☐ Access, Persistence and Retention ☐ Culture of planning, evidence and inquiry

☐ Innovation X Growth and efficiency

What College planning document(s) does the initiative align with?

☐ Educational Master Plan ☐ Facilities

X Staffing ☐ Technology

What evidence supports this initiative?

☐ Service Outcome (SAO) assessment

X Internal Research (Student achievement, program performance)

☐ External Research (Academic literature, market assessment, audit findings, compliance mandates)

Describe how the evidence supports this initiative.

This initiative expands the Foundations longstanding support of Coastline and the students by providing an increase of $80,000 per year to be divided among student Scholarships, PIEAC, and the Student Emergency Fund!

Recommended resource(s) needed for initiative achievement:

Classified staff salary and benefits from General Funds is needed to achieve this initiative.

What is the anticipated outcome of completing the initiative?

An additional $80,000 per year will be directed specifically to PIEAC, the Student Emergency Fund, and to increase student Scholarships!

Provide a timeline and timeframe from initiative inception to completion.

Timeline would begin with board approval and remain ongoing.

Section 6: Prioritization

Initiative	Resource(s)	Est. Cost	Funding Type	Health, Safety Compliance	Evidence	College Goal	To be Completed by	Priority
2- office printers	Measure M or General Funds	Waiting for quote	One-time	No	Internal Research	3,6	2016-2017	1

Initiative	Resource(s)	Est. Cost	Funding Type	Health, Safety Compliance	Evidence	College Goal	To be Completed by	Priority
Increase financial resources to advance student support services and increase opportunity for student achievement.	Pilot Program – hire part-time scholarship support	$20,000	One Time	No	Internal Research	1,4,6	2016-2017	1
Increase financial resources to advance student support services and increase opportunity for student achievement.	Transfer one full-time Classified Staff Aide from Foundation to General funds	$74,656	On Going	No	Internal Research	1,4,6	2016-2017	2