



2016-17
Comprehensive Department Review
Foundation

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Executive Summary

The long-term goal is to ensure Foundation stability in order to meet College funding needs. This requires a clear financial strategy, including College support and increased fundraising staff, if the Foundation is to increase contributions to the College and the students we serve. The human capital inventory revealed current staffing levels may not fully support future needs and objectives, even more so now, as the Foundation is undergoing staffing transitions due to the loss of a full time Staff Aide position. Scholarships, for instance, continued to bring operational challenges to the Foundation.

The Foundation's human resources are its competitive differentiator, and a strong foundation that supports the College's students, faculty and staff, will be critical in supporting its future vision and achieving its full potential. Instituting human capital strategies and plans will be fundamental to building and sustaining a strong Foundation and culture that supports a pre-eminent educational institution of the 21st century. It is impossible to project future growth because the added administrative burden put on the Foundation internal team has become too much.

Additional staff is needed if the Foundation is to be positioned to capitalize upon additional opportunities. Coastline Foundation proposes creating a part-time permanent, Foundation Staff Specialist (E-50), who can provide development and administrative support. Hiring a permanent part-time position will allow for overtime cost savings and 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 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.

College funding would help to ensure longevity of the Foundation and its ability to raise funds for the College. Donors prefer seeing their contributions applied to scholarship and student programs rather than staff salaries.

In the meantime, the Foundation will continue to strengthen organizational and administrative procedures for the Foundation office setting the stage for a financially stable and effective non-profit. The Foundation will increase marketing efforts that result in increased awareness and contributions. We will research and maintain board development. Together we will review all the current Foundation programs for effectiveness and enhancements, then refine as necessary.

The Coastline Foundation supports the College's mission specifically in support of student learning and success. This is evident in our stewardship of scholarships. We will continue to develop Planned Gifts as a substantial means for building current assets and establishing endowments to support the on-going funding needs of the College. This coming year our main focus will be on raising funds for the new "Coastline Promise," as well as creating partnerships for a new fundraising venture, the OC Innovation Speakers' Series, whose goal is to connect corporations in the Orange County region with Coastline's certificate programs, which provides the opportunity to offer internships and/or mentorships, and build awareness of Coastline certificate offerings in the community.

Section 1: Department Planning

Mission Statement

The mission of the Coastline Community College Foundation is to support students through scholarships, endowment and other financial programs to expand the capacity to meet the diverse needs of Coastline students and the community.

Overview

The Coastline Community College Foundation is dedicated to bringing resources to the campus while expanding our image throughout our service area(s).

The Foundation was established and operated as a tax-exempt nonprofit corporation subject to the provision of Section 501(c) (3) of the Internal Revenue Code since 1985. It is administered by an independent Board of Directors who serve voluntarily and without compensation.

The Foundation Directors meet on a quarterly basis to review and plan the operations of the Foundation. The Board of Directors serve through a committee structure and the Board as a whole manages the gifts and investments of funds contributed to the Coastline Community College Foundation.

The charitable purpose of this Corporation is to promote and develop public gift support for Coastline Community College through solicitation of private gift contributions and the prudent management and investment of such gifts for enhancement of the College, its programs and activities, and for student scholarships.

The Foundation works closely with administrators, faculty and staff in developing solutions to funding needs and assisting with event coordination. In addition, the Foundation works closely with the Grants Development Office to submit proposals to support college programs and services and to coordinate approaches to non-traditional campus funding sources.

Internal Analysis

While the Foundation Office was an entity is now comprised of only two staff members (i.e., the Executive Director, and one 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 financial support, and /or services, also serving as an important mechanism to raise the college's profile. The relationships it develops with donors, community leaders, 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 the institution does not have programs, such as a sports, theaters, music and other high-profile programs

that are typically proven to be attractive to donors. The Foundation continues its focus on promoting awareness of the college while capitalizing on the uniqueness and location of the Newport Beach campus, as well as its programs, such as the Art Gallery, ABI Program, sciences, etc.

The human capital inventory revealed that current staffing levels may not fully support future needs and objectives of the Foundation. Scholarships, for instance, continued to bring operational challenges to the Foundation. As a result, there was a major shift in department functions due to the short-comings of unrestricted fund support to the Foundation. January, 2017, the department lost one full-time Staff Aide, thus creating a hole in staff support and development duties. To alleviate this, the Foundation has since transitioned scholarship-related duties and financial tasks to external departments. Moving forward, the Foundation supports the Board of Directors, and is a development office, working as liaison between the college, community members and corporations, and will continue to raise funds for scholarships and other college programs in support of faculty and staff.

Conclusion: The College’s human resources are its competitive differentiator, and a strong foundation that supports the College’s students, faculty and staff, will be critical in supporting its future vision and achieving its full potential. Instituting human capital strategies and plans will be fundamental to building and sustaining a strong Foundation and culture that supports a pre-eminent educational institution of the 21st century.

The Foundation Board of Directors and staff team will continue the focus on generating unrestricted contributions and legacy endowments that will provide long term stability for the Foundation and thus the College. It is impossible to project future growth due to limited staffing in the Foundation office.

Table 1.1 *Foundation Partnerships*

2012-2013	2013-2014	2014-2015	2015-2016
<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • 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 • RVCA : Art Gallery • School’s First: Scholarship • SoCal Gas Company • Union Bank 	<ul style="list-style-type: none"> • Asian & Pacific Islander American Scholarship Fund (APIASF) AANAPISI Scholarship Program: APIASF • Commonwealth • Edison International: STEM Scholarship Program • AT&T • Comerica • Commonwealth Land Title • Fountain Bowl: Scholarship • GST Inc. • Haynes Boone • Kirksey & Company • Rutan & Tucker • School’s First: Scholarship • SoCal Gas Company

	<ul style="list-style-type: none"> Wells Fargo 	<ul style="list-style-type: none"> US Bank Wells Fargo West Group Designs 	<ul style="list-style-type: none"> United Education All. Union Bank Wells Fargo West Group Designs
6	10	14	17

Strategies and process for building partnerships and maintaining relationships:

Develop a Strategic Partnership Plan. A partnership strategy outlines goals for the partnership and the steps necessary to achieve them. The plan should define the role of partners in the larger organizational strategy, shape selection criteria for partners, define engagement strategies for partners, estimate program resources that will be required, and determine evaluation criteria.

The first supporting factor is investment of effort by top management.

- Build partnerships around core organizational needs. Determine up front primary organizational needs and use these to drive selection of potential partners.
- Build partnerships with clear mutual benefits. Take the time to understand how we can help our partner meet their own goals, in addition to our organization’s objectives.
- Think creatively and broadly about whom to partner with. Focus on partners that can offer a variety of resources and those with the infrastructure to support an ongoing commitment.
- Identify dedicated staff resources to build and maintain relationships. Be explicit about who within the organization will be responsible for community outreach efforts and build this into job descriptions and performance reviews.
- Enlist the support of key allies. Look outside of Coastline to identify well-connected supporters who can help build goodwill in the community.
- Make a specific pitch to prospective partners, but have a contingency plan in mind. Do not make a generic “ask,” but be targeted in the request.
- Have a communications strategy. Develop a system to track and maintain relationships. A customer relationship management (CRM) tool with marketing automation capabilities can automate repetitive tasks to enhance cultivating efforts to donors at different points in the lifecycle.
- Reinforce partnerships on an ongoing basis. Find creative ways to acknowledge partners that reinforce the sense of reciprocity.

Table 1.2 *Participants and Events*

Events	2012-2013	2013-2014	2014-2015	2015-2016
Number of events	4	4	4	3
Estimated number of participants	1,100	1,100	1,100	1,000

Table 1.3 *Foundation Revenue*

Revenue Sources	2012-2013	2013-2014	2014-2015	2015-2016
Foundation Revenue	\$696,594	\$995,595	\$892,559	\$836.254

Table 1.4 *Scholarships*

Scholarships / Internal & External	2012-2013	2013-2014	2014-2015	2015-2016
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Number of scholarships given	231	252	312	341
Amount of scholarship money given	\$107,029	\$196,265	\$221,197	\$246,477

Service Area Outcome(s)

Table 1.5 SAO Summary

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 annual campaign Target: Meeting annual financial commitment determined by Foundation Board of Directors.
Advance scholarship awareness and resources.	Measure: Amount of scholarship money disbursed Target: Provide an average of 100,000 dollars in scholarships annually

During fiscal year 2015-2016, the Foundation held a total of three events involving the community. These included; Coastline’s 40th Anniversary Celebration Gala, a Donor Reception, and the annual Scholarship Ceremony & Reception. The Foundation is proposing the possibility of hosting an educational conference for 2017 involving different departments of the college and open to a broader and more diverse audience than before. One of our goals is to build awareness of the college, as well as programs, while also creating opportunities to continue cultivation of college supporters and make new connections.

The second annual Faculty/staff Giving Campaign took place from October 1 through December 1, 2015. Although it had a “quiet” launch and was 30 days shorter than the first one, statistics clearly show an increase of first time donors with more than 23% of donors increasing their gifts from the previous year. The Foundation expects even greater participation this year with proceeds going towards a new “Coastline Promise” fund.

The Coastline Foundation was unable to secure a major donor to name the Newport Beach building this past year, therefore we did not make our goal of raising one million dollars. With the recent acquisition of iWave Donor Research software, we hope to identify and begin cultivating our first major donor of one million dollars or more.

The number of scholarships grew significantly in 2016. However, with limited staffing, the Foundation was not able to advance scholarship awareness and solicit any new internal scholarships this past year. As the College moves forward with implementing its strategic priority of enhancing student success, targeted human capital efforts to bolster scholarships, increase corporate sponsorships, community partners, and other student support functions will be critical to ensuring high levels of growth and success.

External Compliance

The Coastline Foundation is a non-profit (501c3) organization (subject to typical IRS requirements) that provides community and fundraising support to the College. The Coastline College Foundation is also an auxiliary organization of the Coast Community College District and is subject to regulations of the Master Agreement by and between the District and the Foundation. In addition, the Foundation adheres to a specific set of Bylaws, as required for all IRS 501c3 organizations.

By law, the Foundation undergoes a rigorous external audit and subject to show proof of compliance of numerous regulations each year. Another reason to conduct an audit is that many public and private foundations/funders (including governments) require charitable nonprofits to submit audited financial statements or conduct an audit in order to be eligible for funding. The District also ensure compliance by completing a formal Compliance audit every three years, conducted by an external auditor.

Examples of such external compliances include:

- Renewal of California licensing for business entity, such as Statement of Information, registration for raffles with Attorney General's Registry of Charitable Trusts, etc.
- Foundation business is conducted according to the Ralph M. Brown Act, California Government Code 54950
- California Ed Code (section 200 & 72011 non-discrimination). The Scholarship committee reviews and strictly adheres to Federal & State compliance: In addition, selection of a specified protected classes as criteria, is not permitted.
- District Board of Trustees and Coastline Foundation Board of Directors Master Agreement provides outlines requirements in order to remain in compliance with the District
- Fair Labor Standards Act Codified at 29 USC 201-209 and with amendments, the Fair Labor Standards Act establishes a minimum hourly wage and overtime pay, and regulates child labor. Notable for recipients of federal funding, students assigned to summer student research positions are not eligible to work additional Coastline student employment positions during the period of their student work-study program.
- Federal/State constitutional compliance issues; Title V, Title IX, and tort law compliance
- FERPA the Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99).
- Grant compliance and management
- Intellectual Property - policies on copyright ownership
- IRS tax law (publication 526) Charitable Contributions & Coastline Foundation gift policies and procedures (includes scholarships)
- Scholarship management – the Foundation is required to honor donor intent within law and maintain records and provide transparency.
- Board of Directors member signatures on conflict of interest forms, submitted annually

Each year, the Foundation undergoes and external audit, successfully completing with no significant findings and in compliance. Copies of past external audit reports are on file in the Foundation office.

Progress on Forward Strategy Initiative(s)

The long-term goal is to ensure Foundation stability in order to meet College funding needs. This requires a clear financial strategy, including College support and increased fundraising staff, if the Foundation is to increase contributions to the College. The Foundation struggles to grow at a rate proportionate to the College it serves.

The Foundation has been active in the community this past year both strengthening and building new relationships. Vice President of Student Services, Ross Miyashiro gave an informative presentation about the new Coastline Promise to a group of business leaders in Fountain Valley, which was well received. The presentation will hopefully open doors for solicitations to the endowment fund are about to create for the College. We continue to increase the number of partnerships to the Foundation.

The 2015-16 annual fundraiser was a gala to celebrate Coastline's 40th anniversary. It was incredibly well received but was focused on Coastline faculty, staff and alumni. The Foundation's usual conferences bring far more attention to the College and tend to gain more press because of the celebrity of the speakers.

What can be done better or different: Strengthen our communication. The Foundation will develop a comprehensive communication plan that identifies the audiences with which the Foundation should communicate, as well as the type of communication and messages to be used. The Foundation created a Facebook page and Twitter feed to be used as a fundraising tool and to let our own Coastline family know what the Foundation is working on. It will also raise additional awareness to the community.

Fundraising: The Foundation is exploring the idea of an educational conference next year. It will not be directed specifically to one demographic. The event will involve faculty and staff from Coastline, highlighting different departments and programs we provide. The Foundation's goal is to include celebrity and/or expert speakers, and expect to receive press coverage and recognition for the College.

Outreach/partnerships: The Foundation recently invested in a Prospect Research tool which will help tremendously to identify potential donors and partners for the College. Meanwhile, Coastline's College Council is busy working on the Coastline Promise initiative. The Foundation will be supporting the Promise Initiative through an annual giving campaign. The Foundation will also focus the Prospect Research tool to help identify corporations and individuals who would be interested in contributing to the Promise.

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. Fountain Valley, Newport Beach, Garden Grove and Westminster.	Ross Miyashiro gave presentation of College Promise to FV Chamber. Community and chamber relationships secured scholarships for students.
Foundation will build its fundraising efforts and increase the number of scholarships offered to Coastline students by 10%.	Complete /Ongoing	Increased internal scholarships due to past efforts Osher Foundation Endowment.	10% increase in internal scholarships.
The Foundation will increase our net income 5% by focusing on the	In Progress /Ongoing	Fundraising changing format in 16/17.	New fundraiser will involve college participation and

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.		Foundation board approved 1 yr. subscription to iWave, a prospect research tool, to help identify major gift prospects for NB, College Promise, etc.	should attract a more diverse and larger audience. Prospect research tool will help Foundation to fundraise more efficiently.
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 LYNDIA and currently registered in job relevant courses at CCC and LBCC.
Learn SharePoint	In Progress	College is still researching SharePoint	ETA sometime in 2017.
Effectively warehouse and maintain all supplies and materials.	In Progress	Need more storage space for large items. Especially before and after events.	We collect items with no place to store & prep for large annual auction.
Strengthen the Foundations social media presence	Complete /Ongoing	In 2016 Foundation created a separate "non-event" Facebook page & Twitter account.	Social media is now being used as a fundraising tool while bringing added exposure and recognition to the college all year round.
Establish a SharePoint webpage	In Progress	Pending on the College release and training for SharePoint	TBD

Forward Strategy

1. Objective:

Strengthen organizational and administrative procedures for the Foundation office setting the stage for a financially stable and effective non-profit.

a. Action Plan

- Fully incorporate all Raisers' Edge technology and the new iWave Prospect Research tool.
- Ensure full staffing and technology training is provided.
- Review all current Foundation programs (conference, employee giving, President's Circle, scholarships) for effectiveness and enhancements. Refine as necessary.
- Develop new giving programs (Coastline Promise).
- Strengthen collaborative activities through partnerships.

2. Objective:

Strengthen communication and awareness of Foundation services and activities.

a. Action Plan

- Develop a comprehensive communication plan that identifies the audiences with which the Foundation should communicate, as well as the type of communication and messages to be used.
- Social networking: Consider different option on how to sustain consistent communications through social networking venues, and execute a plan using the best options.
- Develop a more "attention-getting" communication vehicle for Coastline faculty and staff regarding opportunities for donating to the Coastline Foundation through payroll deduction. In the last two years, provided a vehicle to encourage staff & faculty to

donate through funds of choice through the “I Care” Campaign; In 2017/18 will continue to offer opportunity through the “Making a Difference” Campaign.

- Evolve the fundraising annual event to an opportunity for a new signature event, the OC Innovation Speaker’s Series, designed to promote college program and certificate offerings. The first will be offered on June 5, 2017, to promote the Cybersecurity program, and create partnerships for internship opportunities, etc.
- Reaching out to the community through the Marketing department, via advertising (newspapers, magazines, etc.) for campaigns, events, etc.

3. Objective:

Increase fundraising efforts

a. *Action Plan*

- Use our new Prospect Research Online service to identify additional corporate prospects who have demonstrated a willingness to contribute to educational institutions and programs.
- Identify alumni and develop a plan to communicate and engage these individuals for future giving.
- Special focus on the annual fund campaign and letter.
- Increase Foundation Board participation and fundraising development, by engaging Board members through invitations to college activities/events, keeping the Board informed through college communications (like the President’s Bulletin), and hosting mixer events for Board members to strengthen relationships, etc.
- Assist the College in promoting and raising funds for the Coastline Promise.

These improvement objectives align directly with the following College goals:

1. Partnerships and Community Engagement
2. Fiscal Stewardship, Scalability, and Sustainability
3. Access and Student Support
4. Student Success, Completion, and Achievement
5. Student Retention and Persistence

Section 2: Human Capital Planning

Staffing

From 2011 to 2017 the Foundation staffing consisted of two full-time Staff-Aids and a full-time Executive Director. In 2017, the Foundation lost one full-time Staff-Aids and the decision was to not backfill the position. Based on the reorganization as outlined in Section 1 of the report, the operational functions of the Foundation have been delineated throughout the College and has narrowed the focus to partnerships, fundraising, and events.

Table 2.1 Staffing Plan

Year	Administrator	Management	F/T Faculty	Adjunct	Classified	Hourly
Previous year 2015-2016		Executive Director 1			Staff Aide 2	
Current year 2016-2017		Executive Director 1			Staff Aide 1	
1 year 2017-2018		Executive Director 1			Staff Aide 1 Staff Specialist .5	
2 years 2018-2019		Executive Director 1			Staff Aide 1 Staff Specialist .5	
3 years 2019-2020		Executive Director 1			Staff Aide 1 Staff Specialist .5	

The Foundation is requesting a part-time permanent Staff Specialist (19.5) position to assist with administrative tasks relating to fundraising projects, such as the annual fundraising events, like the OC Innovation Speakers Series, and the Coastline College Promise initiative.

The Foundation has potential from a human capital perspective to meet its vision and aspirations for the future and effectively implement its strategic plan. A dedicated and committed core of staff has served the Foundation for many years providing solid knowledge and expertise.

The College is currently funding one Foundation Staff Aide position. To prevent the depletion of Foundation's unrestricted funding, the second Staff Aide position was eliminated. The reduction of this second Staff Aide position would increase the administrative workload for the Foundation Director and the remaining staff member, taking focus away from critical fundraising. While annual gifts are the backbone of fundraising they make up the smallest goal in the Foundation's fundraising plan. Major gifts are more difficult to attract and require seasoned fundraisers to cultivate and solicit. The gifts are best solicited by the Foundation Director and the College President, along with Board members when appropriate. These gifts provide financial stability to the Foundation, and have the potential to become Legacy gifts, which can provide long term funding for scholarships, or programs, long after the initial gift is made. Major and Legacy gift solicitation is where the majority of the Foundation Director's time should be spent to get the most return on investment.

In addition to external support, the Foundation has implemented a number of programs on campus that provide an opportunity for our internal constituents (managers, faculty and staff) to support specific programs through payroll and annual contributions. The function of the Employee Giving Campaign will be changing to align itself with the new Coastline Promise.

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 frequently takes advantage of some of the trainings. In addition, Foundation staff is continuing their education and currently enrolled in classes at LBCC that are specifically relevant to their field. Another option to further strengthen staff’s development skills, is to participate in development and fundraising workshops at OneOC in Santa Ana, and fundraising conferences.

Conference participation (in 2015) was paid in part by district professional development funding. The remaining portion was covered by foundation funds. The impact of these conferences 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. Attending the conference allows the Foundation to meet our colleagues from different colleges and to share ideas and best practices. Many ideas for events, campaigns, and procedures have come directly from the CASE conference.

Table 2.2 *Professional Development*

Name (Title)	Professional Development	Outcome
Ashley Lopez	CASE Conference	Current fundraising strategies
Mariam Khosravani	CASE Conference; AFP Conferences	Current fundraising strategies

Forward Strategy

Staffing: Coastline Foundation proposes creating a part-time, permanent Foundation Staff Specialist (19.5 hrs). Hiring this 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 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.

Funding: Donors prefer seeing their contributions go to scholarship and student programs rather than staff salaries. The recently vacated foundation staff position was supported by foundation funds, which depleted Foundation’s operational budget, as a result. The foundation seeks funding from general funds for the part-time Staff Specialist position, which is similar to how the other college foundations operate in Coast Community College District.

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.

Forward Strategy

We are currently running at full capacity but are seeking to become a more welcoming and efficient department. In 2015-16 the college outlined a two-year plan to reconfigure the building and once the plans are in place the department will seek to determine a more optimal location, according to the Foundation's needs.

Section 4: Technology Planning

Technology Assessment

The Foundation utilizes computer technology in all aspects of staff work. The acquisition and implementation of Raiser's Edge (a donor & event management database), and AcademicWorks (a scholarship management software) has provided the Foundation with valuable tools to save time and be more efficient, demonstrate accountability, and continue growth.

Recently the Foundation purchased a prospect research software program called iWave. The department is currently looking forward to training and using it to help identify possible donors.

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.

Forward Strategy

The Foundation can only be successful if we communicate effectively with potential and current donors. We will develop a communications plan and CRM system. Purchase Constant Contact to help with a wider communication reach. Moving forward, Coastline Foundation staff will continue taking advantage of training opportunities to increase their knowledge of Raiser's Edge and be able to use it to its full potential. The Foundation will use new iWave software on a weekly basis to help identify and solicit new donors. The Foundation will also learn and migrate to SharePoint, once available.

Our forward strategy aligns with the following College Goals:

1. Partnerships and Community Engagement
2. Fiscal Stewardship, Scalability, and Sustainability
3. Student Success, Completion, and Achievement
4. Student Retention and Persistence

Section 5: New Initiatives

Initiative: The Coastline Promise –This initiative was inspired and built on a variety of local, state, and national programs that support college access, academic persistence, and completion. Coastline’s President’s Council is spearheading the initiative. The Foundation will be partnering by focusing heavily on fundraising specifically for this project to help ensure its success and sustainability.

While the details have not been finalized, the idea is possibly to offer a “last dollar scholarship” to a cohort of students to help offset tuition costs that are not covered by the Pell Grant and other such funding. Many of our students drop out because they cannot afford the textbooks. One component that sets the Coastline Promise apart from other established programs is the possibility of “promising” the student will not have to pay more than \$50 per textbook.

Describe how the initiative supports the college mission:

This initiative is designed specifically to support access, affordability, quality and completion to increase student success.

What college goal(s) does the initiative align with?

- Student Success, Completion, and Achievement
- Instructional and Programmatic Excellence
- Access and Student Support
- Student Retention and Persistence
- Culture of Evidence, Planning, Innovation, and Change
- Partnerships and Community Engagement
- Fiscal Stewardship, Scalability, and Sustainability

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

- Educational Master Plan
- Facilities
- Staffing
- Technology

What evidence supports this initiative?

- Service Area Outcome (SAOs) assessment
- Internal Research (Student achievement, program performance)
- External Research (Academic literature, market assessment, audit findings, compliance mandates)

Describe how the evidence supports this initiative.

Already, 25 percent of community colleges operate in states where a significant number of students can attend tuition-free or near-tuition-free, and a third of community colleges offer additional tuition-free (or nearly free) programs apart from any other state aid.

Recommended resource(s) needed for initiative achievement:

An endowment is suggested for sustainability. The Foundation will be leveraging all of its contacts, past, present, and future, to help raise funds.

What is the anticipated outcome of completing the initiative?

The expected outcome of the Coastline Promise is offering opportunities to students by creating a culture of college expectation and improve graduation rates among Coastline students.

Provide a timeline and timeframe from initiative inception to completion.

Timeline and timeframe will be determined by the President’s Council. The Foundation is currently preparing the annual giving campaign for this year with proceeds going to the College Promise.

Initiative: Provide professional development opportunities for Foundation staff to strengthen fundraising and development skills.

Describe how the initiative supports the college mission:

This initiative supports the directive of the mission statement which indicates the college's commitment to excellence.

What college goal(s) does the initiative align with?

- Student Success, Completion, and Achievement
- Instructional and Programmatic Excellence
- Access and Student Support
- Student Retention and Persistence
- Culture of Evidence, Planning, Innovation, and Change
- Partnerships and Community Engagement
- Fiscal Stewardship, Scalability, and Sustainability

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

- Educational Master Plan
- Facilities
- Staffing
- Technology

What evidence supports this initiative?

- Service Area Outcome (SAOs) assessment
- Internal Research (Student achievement, program performance) based
- External Research (Academic literature, market assessment, audit findings, compliance mandates)

Describe how the evidence supports this initiative.

Based on the increased level of engagement, interest and/or ideas after attending the 2016 CASE Conference, it would be imperative to continue to provide professional learning, opportunities for staff.

Recommended resource(s) needed for initiative achievement:

Provide the department with \$5,000 in professional development funds.

What is the anticipated outcome of completing the initiative?

An increased understanding of development and fundraising practices, resulting in increased revenue for the foundation.

Provide a timeline and timeframe from initiative inception to completion.

Presented to the wing plan in fall 2016, move to prioritization in Spring 2017, and attend conferences in 2017-18.

Initiative: To connect with global leaders by promoting practices of innovation, and support professional learning internally and externally through hosting local and regional-level events, such as the OC Innovation Speaker's Series.

Describe how the initiative supports the college mission:

This initiative continues to support the development of accessible, flexible and innovative services, and a commitment to excellence

What college goal(s) does the initiative align with?

- Student Success, Completion, and Achievement
- Instructional and Programmatic Excellence
- Access and Student Support
- Student Retention and Persistence
- Culture of Evidence, Planning, Innovation, and Change
- Partnerships and Community Engagement
- Fiscal Stewardship, Scalability, and Sustainability

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

- Educational Master Plan
- Facilities
- Staffing
- Technology

What evidence supports this initiative?

- Service Area Outcome (SAOs) assessment
- Internal Research (Student achievement, program performance)
- External Research (Academic literature, market assessment, audit findings, compliance mandates)

Describe how the evidence supports this initiative.

Based on the observation of other college foundations, providing conferences can be a lucrative revenue generation mechanism strategy. Additionally, internal research from past event offerings (e.g. Women's Conference), also supports this initiative.

Recommended resource(s) needed for initiative achievement:

\$40,000 for funding for event hosting.

What is the anticipated outcome of completing the initiative?

To host a local event, to capitalize on networking and building partnerships with regional and global industries.

Provide a timeline and timeframe from initiative inception to completion.

Present to the wing in fall 2016, move to prioritization in spring 2017, move the funding and hire the position in summer 2017.

Initiative: Increase financial resources to advance student support services and increase opportunity for student achievement by garnering additional funds through outreach and development. This position will also help support events and projects, such as the College Promise and annual fundraising events, such as the Innovation Speaker's Series.

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(s) does the initiative align with?

- Student Success, Completion, and Achievement
- Instructional and Programmatic Excellence
- Access and Student Support
- Student Retention and Persistence
- Culture of Evidence, Planning, Innovation, and Change
- Partnerships and Community Engagement
- Fiscal Stewardship, Scalability, and Sustainability

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

- Educational Master Plan
- Facilities
- Staffing
- Technology

What evidence supports this initiative?

- Service Area Outcome (SAOs) assessment
- Internal Research (Student achievement, program performance)
- External Research (Academic literature, market assessment, audit findings, compliance mandates)

Describe how the evidence supports this initiative.

With the loss of one position and the reorganization of the department, additional activities, responsibilities and initiatives (College Promise, OC Innovation Speaker's Series), there is not proper capacity to take on the workload.

Recommended resource(s) needed for initiative achievement:

Staff Specialist (19.5 hours)

What is the anticipated outcome of completing the initiative?

To have the ability to effectively host events, support Foundation activities, College Promise and increasing revenue.

Provide a timeline and timeframe from initiative inception to completion.

Present to the wing in fall 2016, move to prioritization in spring 2017, move the funding and hire the position in summer 2017.

Section 6: Prioritization

Initiative	Resource(s)	Est. Cost	Funding Type	Health, Safety Compliance	Evidence	College Goal	To be Completed by	Priority
Connect with global leaders to promote practices of innovation and support professional learning, internally and externally, through hosting local and regional-level events.	Funds for event hosting	\$40,000	One-Time	No	External Internal Research	Stewardship, Scalability, and Sustainability	2017-18	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 by garnering additional funds through outreach and development. This position will support events and projects, such as the College Promise and Innovation Speakers Series.	Hire permanent part-time (19.5) Staff Specialist	\$40,000	Ongoing	N/A	Internal Research	Access and Student Support; Partnerships and Community Engagement; Fiscal Stewardship, Scalability, and Sustainability	2017-18	1

Initiative	Resource(s)	Est. Cost	Funding Type	Health, Safety Compliance	Evidence	College Goal	To be Completed by	Priority
Provide professional development for Foundation staff to strengthen fund raising and development skills	Professional development funds	\$5,000	Ongoing	No	Internal research	Culture of Evidence, Planning, Innovation and Change	2017-18	1

JOB SPECIFICATION

STAFF SPECIALIST

Range: E-50
Job Code: 65324
Class: Clerical
Date:

DEFINITION:

Under the direction, perform general administrative and specialized technical work at a paraprofessional level in support of the day-to-day activities of the assigned office or department and to provide clerical support as needed; and perform other related work as assigned.

EXAMPLES OF DUTIES: Duties may include, but are not limited to, the following:

1. Perform a wide variety of administrative staff duties, and assists higher level personnel relative to such subjects as budgeting, finance, scheduling, methods and procedures, staff organization, space, equipment and materials utilization allocation and expenditure of funds, contract relations, personnel administration, educational research and development and community/student services.
2. Conduct research investigations and studies of various operating and fiscal activities and functions of the District.
3. Gather, compile, and analyze data and prepare reports in graphic, pictorial, tabular, written, and oral form.
4. Contact public agencies, private firms, consultants, speakers, District personnel, and the public to obtain and impart information and data related to business, fiscal, personnel, community/student services or educational matters.
5. Apply statistical techniques, or with detailed instructions, statistical techniques in analyzing data.
6. Confer with District personnel regarding assigned projects and may make recommendations based on findings.
7. Develop record systems and maintain administrative business or fiscal affairs.
8. Conduct surveys and investigations related to personnel, space, equipment, material utilization and other assignments.
9. Operate office machines.
10. Perform a full range of simple to complex clerical functions in support of assigned projects, studies, and programs.
11. May program data processing equipment.
12. All positions within this series are required to lead and direct student assistants as needed.
13. Coordinate the assembly, production and maintenance of the instructional schedule and related publications. Review all instructional publications for content and accuracy.
14. Assemble, verify, and edit college catalog and other college/district publications developed and used in assigned areas of work.
15. Coordinate the preparation and distribution of material for a variety of meetings and follow through with forms and reports for use by administration, Board of Trustees or state or federal as may be required.
16. Assist in ongoing curriculum review and revision process.
17. Coordinate the implementation of all curriculum and program changes. Review, edit, and update the curriculum data base and maintain curriculum history.
18. Monitor personnel assignments and initiate Personal Action Forms (PAF) to facilitate timely and accurate payment.
19. Prepare reports related to faculty loading, class section distribution, curriculum changes, etc.
20. Assist with the preparation of a variety of reports as required.
21. Assist with training seminars for staff relating to personnel procedures.
22. Perform a wide variety of tasks at same or lower level classification as need may require.
23. Staff Specialists may direct and oversee the work of other staff at same or lower level classifications as assigned.
24. Perform a wide variety of tasks at same or lower level classification as need may require.

25. Perform other related duties as may be assigned.

MINIMUM QUALIFICATIONS:

Knowledge of:

1. Modern office equipment and procedures.
2. English usage, spelling, grammar, and punctuation.
3. Business math and simple statistics.
4. Principles of record keeping.
5. Basic administrative practices.
6. Administrative survey and reporting techniques.
7. Specialized technical and administrative principles, practices, and procedures of the assigned administrative related functions.
8. Organizational principles and relationships.
9. Systems design and analysis.
10. Methods and techniques of cost analysis.
11. Basic technical and administrative practices and procedures of the assigned area.
12. Fundamental research and data collection methods.
13. Fundamental organizational principles.

Ability to:

15. Operate a calculator, word processor, and computer terminal.
16. Type at an acceptable rate of speed.
17. Gather, compile, and analyze data.
18. Make accurate observations and obtain objective information.
19. Make detailed and accurate calculations.
20. Prepare and present reports in tabular, written, graphic, pictorial, and oral form.
21. Plan and organize work to meet deadlines.
22. Understand and carry out oral and written instructions.
23. Plan, organize, and complete clearly defined assignments with minimal supervisory control.
24. Perform paraprofessional technical work in a general or specialized administrative area.
25. Lead, oversee, and supervise the work of assigned staff.
26. Devise record keeping and reporting systems.
27. Analyze and solve problems of organization and management systems to implement solutions.
28. Independently plan, organize, and complete assignments with a minimal amount of detailed instruction.
29. Design and conduct research projects of moderate difficulty with clearly defined parameters.
30. Perform professional work of average difficulty in general or specialized administrative areas, such as finance, personnel, technical and proposal writing, contract administration, communications, educational research and development.
31. Administer an assigned program, which is limited in scope and well-defined.
32. Establish and maintain effective relationships with those contacted in the course of work.

Education/Experience:

The Staff Specialist is the second level and the incumbent is required to have obtained specialized skills, knowledge and abilities. Experience of at least two years in a same or similar capacity is required. A formal education consistent with responsibilities of the job is also required

PHYSICAL DEMANDS AND WORK ENVIRONMENT

- The physical demands are representative of those that must be met by an employee to successfully perform the essential functions of this job.
- The work environment characteristics are representative of those an employee encounters while performing the essential functions of this job.

- Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.