

Coastline Community College  
 Annual Institutional Planning Report  
 Departmental Review

**Department: Foundation**

Planning Year 2014 for 2015 planning process

**A. Data and Analysis**

**1. Department/Program Data**

	Current Year 2014-15*	Previous Year 2013-14*	Two Years Prior 2012-13
Number of Full-Time Classified	2	2	2
Number of Full-Time Faculty	0	0	0
Number of Full-Time Managers	1	1	1
Number of Part-Time Classified	0	0	0
Number of Part-Time Faculty	0	0	0
Number of Part-Time Managers	0	0	0

**2. Department Activities**

Year	Total support & revenue*	Operational Expenses
2009-10	\$ 996,723.00	\$ 296,828.00
2010-11	\$ 822,249.00	\$ 237,606.00
2011-12	\$ 774,558.00	\$ 275,285.00
2012-13	\$ 696,594.00	\$ 309,667.00

(\* All revenue reported is unrestricted, temporarily restricted and permanently restricted)

2013 – 2014 is not posted at this time because reports have not yet been reviewed by the auditors.

Fiscal year 2012-2013

A. Income:

1. Endow the Future Campaign came from only 3 pledges and one was \$20,000 short.
2. The Foundation decided to expand the community and capitalize on the cancellation of the once tremendously popular Governor’s Women’s Conference. It was an experiment with a new venue and an entirely new audience.
3. Coast District once again offered an early retirement incentive and the President’s Circle encountered another 25% drop in participation.

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B. Expenses:

1. The Coastline Foundation contributed \$100,000 to the Measure M initiative.
2. Increases outreach and continued to advertise Newport Beach Center in community publications.
3. Hosted a Grand Opening Ceremony.
4. Hosted a Ribbon Cutting Ceremony.
5. The Foundation invested in technology by purchasing NextGen, a licensed subscription software program to streamline and make the scholarship process more effective and efficient for the staff as well as the students.

Scholarships:

Year	Number of internal Scholarships	Internal Scholarships	External Scholarships	Total
2009 - 2010	149	\$ 51,795	\$ 6,987	\$ 58,782
2010 - 2011	169	\$ 55,476	\$ 15,746	\$ 71,222
2011 - 2012	217	\$ 74,745	\$ 23,619	\$ 98,364
2012 - 2013	198	\$ 82,400	\$ 28,086	\$ 110,486
2013 -2014	200	\$92,900	\$ 91,698	\$184,598

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 25% over the past five years. This has 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 shows an exponential growth rate of 320% in these external scholarships which involve a tremendous amount of fiscal management, monitoring, reporting and student support. It is impossible to project future growth because the added administrative burden put on the Foundation internal team has become too much.

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3. Proposed Projects Requiring Additional Resources (not listed in Section B-Action Plans/Resource)

Project Name and Description	Total Additional Dollars/Staff Needed
N/A	

4. Outcomes (from most recent Department Review or Annual Department Reports)

Administrative Unit/Service Area Outcomes	AUO/SAO Findings			
	Used/Satisfied	Used/Not Satisfied	Heard Of/Don't Need	Never Heard Of
Build, support and grow community awareness of the Foundation.	29.24%	3.32%	53.16%	14.29%
Provide additional resources for the college by conducting annual, capital and endowment campaigns.	Workshops just begun in Fall 2014. Surveys are being gathered after each Interviewing Techniques & Tips workshop.			
Advance scholarship awareness and resources	Workshops just begun in Fall 2014. Surveys are being gathered after each Resume Writing Techniques & Tips workshop.			

Action Plans in response to the outcomes:

Foundation will cultivate relationships, sponsor and participate in other community events throughout the year. Recruit leaders who are able to give and help solicit upper-level gifts. Update website and provide general tips & resources for students to research their own scholarships throughout the year. Promote and offer scholarship information twice per year. Actively solicit more external scholarships. This would require an hour support staff member to accomplish this plan.

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5. Progress on 5-year Goals (from most recent Program Review)

Goal	Complete	Partially Complete	Not Started	Abandoned	Comments
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.			X		The goal was established fall 2014 and will be planned in spring 2015
Foundation will build its fundraising efforts and increase the number of scholarships offered to Coastline students by 10%.			X		The goal was established fall 2014 and will be planned in spring 2015
The Foundation will increase our net income 5% by focusing on the Foundation's annual fundraiser, the Capital Campaign, and hosting community events at Newport Beach, all of which provide publicity and promote awareness of Coastline Community College.			X		The goal was established fall 2014 and will be planned in spring 2015
Develop and sustain world-class development professionals and maintain relevancy in the field.			X		The goal was established fall 2014 and will be planned in spring 2015
Strengthen scholarship operations to effectively meet demands.			X		The goal was established fall 2014 and will be planned in spring 2015
Learn SharePoint			X		The goal was established fall 2014 and will be planned in spring 2015
Effectively warehouse and maintain all supplies and materials.			X		The goal was established fall 2014 and will be planned in spring 2015
Strengthen the Foundations social media presence			X		The goal was established fall 2014 and will be planned in spring 2015
Establish a SharePoint webpage			X		The goal was established fall 2014 and will be planned in spring 2015

Analysis of Progress on 5-year Goals

Goals just established

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6. New Annual Program/Department Goals

Goal	5 Year Goal Addressed	Project Completion Date	Lead Employee	Comments
N/A				

B. Action Plan and Resource Requests Based on Annual Data

Action Plan	Inst. Goals	Type of Resource	Resource needs, if any	Dept. Priority	Approx. Cost
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.	2, 4, 6	Admin. Pro Devel	Increased memberships - \$500 Increased community sponsorships - \$5,000 Additional and specific marketing materials – \$2,500 Added website support – no cost	4	8,000
Foundation will build its fundraising efforts and increase the number of scholarships offered to Coastline students by 10%.	2, 4, 6	Admin./ Staffing	Year round solicitation of both internal and external scholarships Website support to update and expand scholarship opportunities Social media support to bring awareness. Additional and frequent marketing pieces – \$ 2,000 Additional staffing is necessary to assist in achieving these outcomes - \$ 20,000	2	22,000
The Foundation will increase our net income 5% by focusing on the Foundation’s annual fundraiser, the Capital Campaign, and hosting community events at Newport Beach, all of which provide publicity and promote awareness of Coastline Community College	2, 4, 6	Admin.	Social media support to bring awareness of activities– no cost Additional, event specific marketing pieces - \$5,000 Hosting additional donor solicitation and cultivation activities - \$10,000	3	15,000
Develop and sustain world-class development professionals and maintain relevancy in the field.	6	Pro Devel	Professional development budget to allow for memberships to associations and staff attendance to annual resource development events.	5	5,000

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Strengthen scholarship operations to effectively meet demands.	2, 6	Staffing	Part-time hourly position to assist with the scholarship operations	1	20,000
Learn SharePoint	6	Pro Devel	The office will need to work with IT to setup and learn how to use SharePoint	8	No cost
Effectively warehouse and maintain all supplies and materials.	6	Facilities	Determine a location that can be effectively utilized to store foundation event materials and promotional items.	6	TBD
Strengthen the Foundations social media presence	2, 6	Tech	Update and maintain the Foundation's Facebook and Twitter pages	7	No cost
Establish a SharePoint webpage	3, 6	Tech	SharePoint website	9	No cost

\*Reference specific sections of College Education Master Plan, Strategic Initiatives, 5-year Program Review Goals, Accreditation Recommendations, AUO/SAO evaluation and assessment, College Mission, or other relevant planning documents. \*\*Prioritize the program's resource needs with 1 being the most important and subsequent numbers being less urgent.