Prepared by: Tim Foster

What are the strengths of your area?:
1. Volunteers - The volunteer board and committee structure of the Foundation promotes connectivity between the community needs and resources and the District's capabilities and needs. Volunteers are engaged to help access the community, distribute District public information, and share the District's benefits.
2. Not-for-profit status - The COS Foundation serves as the not-for-profit organization for the District. It efficiently facilitates charitable gifts to benefit the District and allows the District to access resources (grants and others) that it would not otherwise be able to access without an active 501c3 corporation to accept the funds.
3. The COS Foundation can employ professional staff to support and further the advancement needs of the District. These dedicated staff can provide technical expertise and support services for all financial development efforts within the District such as sports and art, while also directing its own development activities to solely benefit the District at large.
4. The Foundation assets - The assets of the Foundation is predominantly liquid and unrestricted. The investment income affords a steady stream of annual, six-figure disbursements to the District to support District objectives.

What improvements are needed?:
While the COS Foundation has supported the District well. The unrealized opportunity to do more is significant. The primary sources of Foundation income each year are a result of net surpluses from special fundraising events and the investment income from Foundation invested assets. Little conscious effort has been invested by volunteers or staff to gain resources from other traditional financial development efforts such as:

1. Annual giving campaigns
2. Major gift development
3. Capital gift development
4. Planning giving program
5. Alumni Development

Describe any external opportunities or challenges:
Opportunities: The COS Foundation and the District have substantial opportunities for added community investment and philanthropic giving with the enhancement of the campus in Hanford and the new campus in Tulare. There are many opportunities for naming gifts for the new buildings and to spur renovation and repurposing of older ones. There also is approximately 300,000 living COS Alumni that have not been materially engaged in any way by the District or the Foundation. This population of individuals that have directly benefited from their time at COS often have the greatest affinity for the college, yet remain disconnected and unengaged.

Challenges: The service area of the District contains a substantial number of charitable organizations that are capable of attracting donors that might otherwise support the COS Foundation. It will be up to the Foundation to find new philanthropist while also engaging the existing philanthropic community with a case compelling enough to attract giving. High education, nationally, is one of the top three philanthropic giving categories in dollars donated. Locally, however, the tough economy and high poverty levels tend to inspire greater giving to basic need charities, providing shelter, food, and health services. Finally, while the population of alumni is large and predominantly unengaged, the challenge to make up for lost ground is immense. Most notable is the challenge to gather all of the names of the alumni and get current contact information for them so that an engagement plan at least has an audience. Services exist to take District records on microfiche, input them into a database, and then proceed to update the contact information. But with these services costing as much as $2.00 per name, a 300,000+ list of alumni can be very expensive to access.

Overall Outcome Achievement:
The COS Foundation executed all three of its routines, Scholarships, Project Funding, Special Events relatively well over this past year.

Scholarships were efficiently and effectively distributed with an 11% improvement in application rates and award rates. Even the Scholarship Awards Night that is hosted by the Foundation was improved upon based on feedback from those in attendance in previous years.

A Request for Applications (RFA) process was developed to disburse Foundation funding to District needs. The process worked to gain ample applications and to align Foundation funding to the supporting the District Objectives. Project ideas were so plentiful ($529,000 worth) that the Foundation board approved funding $205,000 worth of projects rather than the original $105,000 allocated. There were some difficulties during the implementation of some of the funded projects. It seems that some of the applicants did not involve the dean, provost, facilities director or information technology director when the project implementation would clearly need to. The result was some proposals posed undue challenges and unexpected costs at implementation. So while the process effectively distributed resources. Improvements to the process will smooth implementation and ensure future projects are better thought out initially.

Overall the special events the COS Foundation executed realized greater attendance, exposure and financial success. Some new events were added also. More COS employee engagement and alumni engagement will help these events maintain a base for financial development while other means of financial support begin to be developed. The overall financial support picture was too difficult to measure accurately. More total income was generated over last year, but the performance evaluation measurements could not be conducted with the current chart of accounts. It is too difficult to accurately differentiate between charitable gifts and...
program revenue and very difficult to isolate various types of expenses.

Overall the COS Foundation executed its routines with improvements over the prior year. Not all of the improvements could be accurately measured though. It will take some changes to the existing chart of accounts and tracking systems to generate the data necessary to establish baselines and measurements from those baselines.

**Changes based on outcome**
The COS Foundation is building off of its 11% increase in completed scholarship applications by expanding its marketing and outreach during the next application period. Staff are also utilizing a technique perfected last round to directly email each applicant that has initiated an application, but has not completed it to urge them to complete it by the deadline.

The RFA process has three improvements:

1. Better Outreach – Longer application period with more reminders. The Foundation Director is also initiating conversations with COS staff to encourage more applications across all operating elements of the District.
2. Better Instruction – The application policy, notice, instructions, and evaluation tool were all updated to encourage more inclusion with deans, provosts, the director of facilities, the director of information technology and other relevant parties to ensure what is proposed is what can be implemented.
3. Better Deadline – A deadline for applications to be submitted to the appropriate VP was added to afford the VP one month of review and revisions prior to the deadline to the Foundation.

The special events will continue to evolve in their pursuit of sponsorships, their promotion, and, most importantly, their use to develop more leads for larger gifts.

The chart of accounts will need to be redeveloped to satisfy the data collection and reporting needs of the Foundation, both income and expense detail.

**Outcome cycle evaluation:**
The COS Foundation completed its initial year of the outcome cycle. Overall the Foundation is progressing well in its usual operations while also becoming better aligned with and supportive of District Objectives. For the income potential of the Foundation to be realized more channels of giving must be developed and a greater audience must be created. Programs for annual campaigning, grant pursuit, major gifts, capital gifts, and planned gifts must all begin to realize this potential and an accurate database of alumni will help ensure there is a large audience with an inherent affinity for the District that are being engaged through special events and all of these other channels as they are developed and implemented.

**Action: Redesign Chart of Accounts**

Redesign the Foundation Chart of Accounts to accurately distinguish contributions from other types of revenue sources.

**Implementation Timeline:** 2014 - 2015
**Start Date:** 08/01/2014
**Completion Date:** 11/28/2014
**Status:** New Action

**Identify related course/program outcomes:** District Objective #7 for 2013-2014: Allocate resources based on an accountable and systematic District-wide planning and budget development process that links this allocation to Institutional Program Reviews and the Strategic Plan

**Person(s) Responsible (Name and Position):** Tim Foster, Foundation Director

**Rationale (With supporting data):** There are revenue sources within the Foundation beyond contributions. Therefore total revenue is not an appropriate measure. However the current accounting structure does not allow for a clear distinction between sales receipts and contributions. The current account structure also does not afford enough detail to accurately track operating expenses of the Foundation against a board-approved spending budget. More work must be done to redesign the chart of accounts to allow a clear reporting of giving and program income separately and to accurately report income and expenses against a board-approved budget to allow appropriate transparency and monitoring by the Foundation board.

**Priority:** High
**Safety Issue:** No
**External Mandate:** No
Action: 2015-2016 RFA
Release the RFA for the 2015-2016 funding year within August 2014 to allow more time for completion.

**Implementation Timeline:** 2014 - 2015
- **Start Date:** 08/31/2014
- **Completion Date:** 05/29/2015
- **Status:** Continued Action

Identify related course/program outcomes: District Objective #7 for 2013-2014: Allocate resources based on an accountable and systematic District-wide planning and budget development process that links this allocation to Institutional Program Reviews and the Strategic Objectives

**Person(s) Responsible (Name and Position):**
Tim Foster, Foundation Director

**Rationale (With supporting data):**
Providing an accessible and transparent method of investing Foundation resources toward projects that align with district objectives is critical to building donor confidence in the COS Foundation.

**Priority:** Medium
**Safety Issue:** No
**External Mandate:** No

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Action: Connet with COS Alumni
Develop a digital database of COS alumni from 1965 to present with current contact information. Develop and implement an alumni engagement plan for all existing and future alumni contacts.

**Implementation Timeline:** 2014 - 2015
- **Start Date:** 11/17/2014
- **Completion Date:** 06/30/2015
- **Status:** New Action

Identify related course/program outcomes: District Objective #7 for 2013-2015: Allocate resources based on an accountable and systematic District-wide planning and budget development process that links this allocation to Institutional Program Reviews and the Strategic Plan.

**Person(s) Responsible (Name and Position):**
Tim Foster, Foundation Director

**Rationale (With supporting data):**
Action aligns with COS Foundation Services Area Outcome: Develop Additional District Resources - Increase the total amount of financial resources contributed to the District. This particular action will require district resources to develop the database of alumni with current contact information.

**Priority:** Medium
**Safety Issue:** No
**External Mandate:** No

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Currently the District retains student records of alumni prior to 1985 on microfiche with no possibility for updating. From 1985 to present is in Banner, but contact information in those records are also as old as the year the student last attended school. In order to contact alumni for the District, the appropriate fields within the microfiche records would need to be input into a searchable database. Once those records are in a searchable database, they can be given to a data cleansing service to find current contact information, even email addresses, for each. The cost for this service ranges widely based on the quality of the media, the number of fields per record to be input, and the number of records contracted. It is not unreasonable though to expect to pay close to $1.25-$1.75 per record.

**Resource Type:**
Technology

**Related Documents:**
[Alumni Database Development Cost Estimate.xlsx](#)