

Comprehensive Program Review Report



Program Review - Foundation

Program Summary

2023-2024

Prepared by: Tim Foster

What are the strengths of your area?: The COS Foundation leverages several strengths to provide benefits to District.

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 501(c)(3), 509(a)(2) corporation to accept the funds.
3. Specialized Staff - The COS Foundation can employ professional staff to support and further the community engagement and resource development 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 are predominantly unrestricted. The investment income affords a steady stream of annual, six-figure disbursements to the District to support District objectives and advance its mission. In the event of a major strategic need for unrestricted capital, the COS Foundation board may be approached to quickly supply that need or mobilize to help secure those needs from the community.

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

1. Alumni Development - Through Alumni Re-connections and Cultivation
2. Planning giving program - Developing a Planned Giving Program and Marketing Plan
3. Annual giving campaigns - Through Campaign Creation
4. Major gift development - Through needs articulation and campaign creation

Much more must be done to increase the alumni and planned giving audiences and engage them as donors. The Foundation's current staff is limited to 2.6 FTEs. The rigorous event schedule consumes much of the resource development time from the Foundation Director and Accounting Technician. The 24-hour-per-week scholarship specialist's time is almost 100% devoted to scholarship administration, with only a few hours leading up to and during the day of foundation events. Adding on full-time classified staff could immediately:

- *enhance event effectiveness through greater attendance and messaging
- *increase engagement of alumni and planned givers
- *expand the reach of the foundation into the communities the college serves
- *ultimately generate greater resources for the students and the college

Some larger outcomes can be expected through the growth and redistribution of tasks performed by the foundation's human resources.

Describe any external opportunities or challenges.: Opportunities: The cause the COS Foundation represents, higher education, is the cause second only to religion for attracting the most dollars donated in the United States each year. The COS Foundation and the District have substantial opportunities for added community investment and philanthropic giving with the establishment

and growing student attendance of the Hanford and Tulare college centers. There are many opportunities for naming gifts for the new buildings and to spur renovation and re-purposing of older ones. There also is an estimated 190,000 living COS Alumni whom the District or the Foundation has not materially engaged for most of the college's 95-year history. This population of individuals who have directly benefited from their time at COS often have the greatest affinity for the college yet remain largely disconnected and disengaged.

The Foundation has greatly increased the utilization of a peer-to-peer fundraising campaign platform called eTeamSponsor. This system is responsible for increasing the Foundation's total number of donors and provides opportunities for greater donor cultivation and retention efforts.

Challenges: The service area of the District contains a substantial number of charitable organizations capable of attracting donors that might otherwise support the COS Foundation. It will be up to the Foundation to find new philanthropists while also engaging the existing philanthropic community with a case compelling enough to attract giving. Nationally, education is second only to religion in dollars donated to a philanthropic giving category. Locally, however, the 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 disengaged, the challenge to make up for lost ground is immense. The COS Foundation now has all of the names of the alumni from 1987-2020 and now has current emails and mailing addresses for approximately 39,800 of them. The Foundation now has a professionally produced, data-driven alumni engagement plan to use to reach those who have passed through COS and those walking the campuses right now. Implementing that plan in a sustainable way, with the limited capacity of the current COS Foundation staff level, will be a challenge. The COS Foundation board has made a material investment in reconnecting with COS Alumni by developing an alumni engagement plan and utilizing contracting with a marketing firm to implement the plan. It is now up to COS Foundation staff to sustain those efforts in a meaningful way.

Overall SAO Achievement: SAO Develop Additional District Resources - SAO remains the primary focus for change. Most efforts can be categorized into two main categories: 1) Leveraging and perfecting existing methods of resource development (ie. fundraising events, campaigns, investment income, and directed gifts like scholarship donations) to improve overall income to the Foundation and, therefore, support to the District and our students. 2) Initiating or expanding new resource development channels like alumni gifts, capital gifts, planned gifts, etc.)

The Foundation's event schedule has largely been restored and the revenue sources have tracked closely to pre-pandemic levels. The 2022-2023 ticket sales and auction proceeds have increased by 33% over the prior year. Sponsorships have held steady from last year. The Foundation staff efforts toward improving campaigning for gifts, mainly through peer-to-peer campaigning, grew. The use of eTeamSponsor increased new donors in 2023 and donations, \$32k in 2022 and \$101k in 2023, thanks to increased sports participation and the addition of the COS Band and COS Choir utilizing the service. Those efforts, coupled with the Foundation staff efforts to garner more campaign gifts, resulted in increased general support, inside scholarship, and endowed scholarship donations in 2022-2023 over 2021-2022 by \$29,193 or 8%. The partnerships with Visalia Rotary Clubs and the Visalia Rotary Community Foundation Board moved away from hosting an annual event since the Pandemic but remain strong with scholarship support. The partnership with the Tulare Chamber of Commerce to host the Crush Party at the Tulare College Center campus has also proven strong. The event returned in October 2021, but outdoors. It was well-attended and will now be planned for its third year outdoors.

There was a substantial increase in outright gifts over \$500 from unduplicated donors this year, a 57% increase. Total contributions for the year increased to \$859,227.73 over \$590,812.61 over the prior year, a 45% increase.

Investment income continues to be an essential component of the Foundation's capacity to advance the district and invest in COS student success. Market performance has not tracked at the level of annual operating spend of 3% of unrestricted investment capital and 5% spend of permanently restricted endowment capital. The Foundation board and its investment committee are watching this current trend closely, but holding to the current levels as the long-term return rate still indicates those spend rates are sustainable. The investment portfolio has decreased from just over \$19 million to \$16.7 million.

SAO Direct unrestricted Foundation resources to the District based on an accountable and systematic District-wide process that directly links to District objectives - Since 2014-2015, the COS Foundation has facilitated and funded a Foundation Project Funding application process that supports projects with demonstrated alignment to District Objectives and the needs of the District. From inception through the 2022-2023 awards process, the COS Foundation has committed \$1,446,555 in project funds. However, more resources are needed each year, as \$49,491 of the total value of applications submitted for this funding went unfunded this cycle. Certainly, not all were worthy of funding, but there remains more need than capacity each year. Each year, though, the COS Foundation has also been able to incorporate one or more projects requested through the District's above-base resource allocation process, further integrating and aligning the Foundation resources to the District needs.

A unique opportunity to support the college presented itself in 2022. The Board of Trustees voted to pursue a \$95 million bond measure to build and launch a university center and student union. The COS Foundation was approached to expedite the campaign efforts by fully funding the campaign budget of \$300,000. The Foundation's Board of Directors agreed, and the campaign succeeded. The voters passed the bond measure, and plans are underway to build both structures.

SAO Develop and administer student scholarship funds and awards - The Foundation continues to make steady improvements in all areas it can within the scholarship system. During the 2023-2024 awarding process, the Foundation facilitated 528 awards worth \$596,197 more than the prior year by 6%.

The foundation staff focus has been on the following:

- increasing the number of applications submitted,
- the efficiency of the awarding process,
- the quality of the donor experience, particularly with COS Scholarship Night
- and the reduction of scholarship funds returned or carried over due to disqualifications.

Despite these improvements, a great amount of need is left unmet. Only 68% of the applications were awarded a scholarship, leaving many students possibly without the means necessary to attend college. The Foundation's efforts of refinements are needed, but the focus on resource development will surely infuse more resources into the COS Scholarship program. An estimated \$190,783 could have been used to provide similar scholarship awards to the number of applicants that did not get awarded as those that did. This is a much smaller funding gap than in the prior years, by more than half, but there is still a significant gap to address.

Changes Based on SAO Achievement: The COS Foundation is going to continue to refine its operations of scholarships and project funding. Most of the COS Foundation's changes will be to continue increasing resources and overall community outreach. Foundation staff will attempt to further increase outright gifts through Foundation campaign efforts and eTeamSponsor peer-to-peer campaigning through increased COS athletic team participation and expanding to other COS programs like music, theatre, Puente and others, and COS student clubs. We will do so while increasing the effectiveness of existing events and regaining some associated gifts.

In December 2022, the COS Foundation board of directors developed a new strategic plan that is better aligned with that of the college. The four goal areas, growth, success, equity, and sustainability align with the college's four master plan areas of focus. Progress in each of these areas is defined differently than in the college, but it provides a guide to considering the Foundation's means to further the strategic goals and objectives of the college. It is expected that the planning cycle will follow that of the college so that when it is time to prepare a foundation plan for 2026, it will be with the consideration of the new strategic plan currently under development by the college.

The Foundation staff has reached its limitation on implementing new operations and continuing them. There will be a need to add classified staff or start discontinuing some activities for the sake of beginning and sustaining new ones. For example, the COS Foundation may need to decrease the events it hosts to increase its capacity to develop the COS Alumni Network and the planned giving program. Both have their merits. But if total resources available to support the District is the expectation, some less effective fundraising methods need to be discontinued on the expectation that others will soon surpass them with larger and more frequent gifts.

Outcome cycle evaluation: Overall, the Foundation is progressing steadily 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. The Foundation is experiencing increased large donor engagement as indicated by the growth in the total value of donor gifts exceeding \$500. Recent increased fundraising efforts that are campaign-based, like eTeamSponsor campaigns over those event-based efforts like the former Football Crab Feed, allow for more effective and efficient fundraising for teams and departments. Further technical assistance and established best practices are needed next to increase donor retention and enhanced engagement for higher subsequent gifts from the same donor. The Foundation now does have an alumni engagement plan and marketing firm assisting in its initial launch. It has an engagement plan for planned givers that has shown promise. Finally, the COS Foundation has a very positive reputation in the community and within the District as an active and positive force supporting COS and Student Success. COS really is the only higher education provider in the district seeking donations. The COS Foundation volunteers and staff will continue to seek out and match those with an affinity for higher education and those with an affinity for the college with the needs of the College of the Sequoias.

Action: Expand utilization of peer-to-peer campaigns

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Expand utilization of peer-to-peer campaigns for fundraising by more COS Athletics teams and other COS departments and programs. At least two more teams will add campaigns and three other COS programs will add campaigns in this cycle.

Leave Blank:

Implementation Timeline: 2022 - 2023

Leave Blank:

Leave Blank:

Identify related course/program outcomes:

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

Rationale (With supporting data): The Foundation has sponsored the use of a vendor called eTeamSponsor to develop and execute peer-to-peer campaigns for several of the COS Athletics teams. The fundraising system has been very effective at generating resources for teams in an efficient manner. These peer-to-peer campaigns allow all student-athletes to participate in the fundraising process by referring friends and family members to support their campaign goal. The campaigns have reduced the need for other, event-based fundraisers the coaches were doing that were much more work and exposed the college to more liability (raffles, alcohol sales, food handling, etc.). Finally, the peer-to-peer campaigns have increased the overall number of new donors going into the foundation's donor database. Those new donors may now be cultivated into repeat donors providing greater gifts over time.

This year more COS Athletics teams will implement an eTeamSponsor campaign. Also this year, the foundation will seek to initiate new eTeamSponsor campaign participants from the various departments that have fundraised for their programs. Departments include theatre, music, Puente, and sports medicine. These additional departments will generate more immediate support for the program, and also provide a case for support for the college in general. These additional cases for support to a wider audience will provide an increased base of supporters of the college.

Priority: Medium

Safety Issue: No

External Mandate: No

Safety/Mandate Explanation:

Update on Action

Updates

Update Year: 2022 - 2023

06/30/2023

Status: Continue Action Next Year

The eTeamSponsor program expanded significantly. Total donations through this mechanism increased from \$32k in 2022 to \$101k in 2023. The addition of the COS Band and COS Choir programs raised over \$30k for their respective programs. Football also made substantial increases. Next year student clubs will be afforded access to the the eTeamSponsor platform to solicit club donations.

Impact on District Objectives/Unit Outcomes (Not Required):

Link Actions to District Objectives

District Objectives: 2021-2025

District Objective 4.3 - Improve professional development practices District-wide for all District employees to support equity and operational effectiveness from 2021-2025.

Action: Expand Funds (2022-2023)

The COS Foundation board members seek to positively impact more operational aspects of the college by expanding on the Athletics and Local Heroes funds concept developed over the past few years. The Foundation will establish a group of funds tentatively titled: Fine Arts, Business, Agriculture, Science, Career Technical Education, and Student Support Services.

Leave Blank: Active

Implementation Timeline: 2022 - 2023

Leave Blank:

Leave Blank:

Program Review - Foundation

Identify related course/program outcomes:

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

Rationale (With supporting data): The COS Foundation board members seek to positively impact more operational aspects of the college by expanding on the Athletics and Local Heroes funds concept developed over the past few years. The Foundation will establish a group of funds tentatively titled: Fine Arts, Business, Agriculture, Science, Career Technical Education, and Student Support Services. These funds will be developed with a small group of committee volunteers to both create a means for attracting directed gifts to the fund and to manage the highest and best use of the resources given to each fund. By creating each of these funds, the foundation will place the college in a better position to receive planned gifts and larger donations to a greater number of areas within the college.

Each fund will have a specific case statement developed. Each fund will have a designated group of committee members from the board of directors and community members that have unique qualifications for serving in the respective area the fund intends to serve (ie. member of the community well-connected in the art community serving on the Fine Arts Fund Committee). The added volunteers and added credibility from these volunteers will help do the work of infusing the college into these various communities within the district.

Priority: High

Safety Issue: No

External Mandate: No

Safety/Mandate Explanation:

Update on Action	
Updates	
Update Year: 2022 - 2023	09/26/2023
Status: Continue Action Next Year	
The Foundation has effectively instituted three of the eight fund committees: Athletics, Local Heroes, and Fine Arts. Student Services should be started by the first of 2024. Agriculture and Career Technical Education will also follow in 2024.	
Impact on District Objectives/Unit Outcomes (Not Required):	

Link Actions to District Objectives

District Objectives: 2021-2025
District Objective 2.1 - Increase the number of students who earn an associate degree or certificate (CTE and non-CTE) by 5% from 2021-2025.
District Objective 2.4 - Increase the percentage of CTE students who achieve their employment objectives by five percentage points (job closely related to field of study and attainment of a livable wage) and the number of CTE students who successfully complete 9+ CTE units in a single year by 10% from 2021-2025.
District Objective 4.1 - Increase the effective use of data and transparency in decision making at all institutional levels from 2021-2025.
District Objective 4.2 - Improve communication practices needed to support organizational effectiveness and continuous improvement across all District units and constituents from 2021-2025.

Action: COS Alumni Engagement Launch Year (2022-2023)

Initiate and perpetuate a COS alumni engagement plan, including branding, recruitment, engagement, and campaigning systems that may be properly sustained over time.

Leave Blank:

Implementation Timeline: 2021 - 2022, 2022 - 2023

Leave Blank:

Leave Blank:

Program Review - Foundation

Identify related course/program outcomes:

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

Rationale (With supporting data): Effective higher education resource development benefits from a functioning alumni engagement program. The COS Foundation lacks such a program now, but is in the initial development phase with a contracted marketing firm, Interact Communications. There are approximately 140,000 alumni of the College of the Sequoias. The College of the Sequoias supplied the COS Foundation with a digital database of directory information available from all students that attended COS Between the years of 1986-2020. From these records, the COS Foundation has been able to acquire 37,000 emails and 47,000 current mailing addresses of alumni. This new source of contact information will be enhanced annually with additional student directory information.

The value of interacting with this large group of alumni prompted the COS Foundation board to invest in a three-year capital budget to develop and implement a COS Alumni Association brand, and alumni engagement strategy with a marketing firm experienced in two-year college campaigns. All of these elements are in place and require further execution this year. The foundation requires more human resources to fully realize the potential of engaging this large population in a way that produces meaningful results for the college. The 2.6 FTEs of staff in the foundation are identifying what aspects can be done by foundation staff, what can be done by volunteers, what can be done by vendors, and what cannot be done without additional staff. It is clear that a full-time classified staff person could be fully utilized in this area of work and some of the other aspects of event planning and execution.

Priority: High

Safety Issue: No

External Mandate: No

Safety/Mandate Explanation:

Update on Action

Updates

Update Year: 2022 - 2023

05/26/2023

Status: Continue Action Next Year

The Alumni Network had a significant presence at the COS Commencement in May 2023. Volunteers handed out fans, bottled water sleeved with branded koozies, and other promotional items in addition to the traditional license plate frames. Every item had a QRCode to direct people to the Alumni Network sign-up page. Each QRCode is unique to the particular promotional item so the performance of each item can be tracked. Fifty-two new enrollments were tracked from Commencement to a few days after.

Impact on District Objectives/Unit Outcomes (Not Required):

Resources Description

Personnel - Classified/Confidential - An additional full-time classified staff member to serve as a Financial Development Specialist. (Active)

Why is this resource required for this action?: An additional staff member skilled in correspondence, event organization, and overall membership engagement will dramatically accelerate the level of alumni engagement and the overall number of alumni being reached by engagement activities. The associated tasks to do this are not enough to justify a full-time position. By adding tasks currently performed by the COS Foundation Director and the Accounting Technician, the director may engage in more highly skilled activities associated with major, planned, and capital gift cultivation and the accounting technician can improve the data capture and management of our expanded donor database and gift volume. The delegated duties would include event planning and execution, website development and content maintenance, newsletter content creation and distribution, and alumni database maintenance for a database that has grown 37 times larger with the addition of alumni directory information. (See attached task breakdown)

It is expected that the added staff resource will quickly (within one to two years) generate greater revenue from resulting gifts to the District to far surpass the annual operating outlay requested of the District. The Return On Investment (ROI) for this position will be greater than the investment. These gifts may manifest in the form of greater project funding allocations, more scholarships, and any other resource need the District may call upon the Foundation to help secure to benefit the District and the students directly. But overall support of the Foundation could also be channeled to certain general fund expenses of the District to more directly offset the additional general fund outlay, if necessary.

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It is important to the structure of the COS Foundation that its personnel costs and the majority of its other operating expenses continue to be underwritten by the District as opposed to such expenses being underwritten by the Foundation. Fundraising for operating costs creates a whole new dynamic in how a case for support is portrayed to the community and it shifts the priorities of staff. Staff would need to first raise their operating budget before any District priority. Foundations of California community colleges that must raise operating dollars institute schemes such as donation fees, funds held in trust fees, investment income assessments, and unique fundraising efforts specifically to underwrite operations. Doing so dilutes energy spent raising resources to donate to the college and students as operating dollars must be the first dollars raised to sustain operations. Such factors can also diminish gifts to the college as donors learn that a portion of their donation will not go to their intended cause within the District. Avoiding these dynamics is why 4-year universities avoid such structures and generally underwrite the operations of the Foundation with the understanding that far more resources will be donated to the university than spend on these operating costs. Currently, less than \$50,000 of operating expenses are being underwritten directly by the Foundation. The revenue source to cover those expenses is investment income, so that staff may avoid raising money for operations. The rest of the investment income is used for annual gifts to the District and continued growth of the unrestricted capital balance being invested.

Notes (optional): The cost estimate is strictly for personnel costs of a full-time classified position with a base salary of approximately \$60,000. Office space and other infrastructure that is already in place in the Foundation office to accept one more staff member. Other incidental operating expenses associated with this new staff position can be covered by Foundation investment income.

Cost of Request (Nothing will be funded over the amount listed.): 90000

Related Documents:

[Additional Staff Task Assignment and Reassignment list.docx](#)

[Alumni Engagement Plan.pdf](#)

[Capital Budget for Alumni Implimentation.pdf](#)

[Foundation Org Chart Current-Future.pdf](#)

[Foundation Staffing Levels.PNG](#)

Link Actions to District Objectives

District Objectives: 2021-2025

District Objective 1.1 - The District will increase FTES 2% from 2021 to 2025.

District Objective 2.1 - Increase the number of students who earn an associate degree or certificate (CTE and non-CTE) by 5% from 2021-2025.

District Objective 2.4 - Increase the percentage of CTE students who achieve their employment objectives by five percentage points (job closely related to field of study and attainment of a livable wage) and the number of CTE students who successfully complete 9+ CTE units in a single year by 10% from 2021-2025.

Action: Planned Giving Program Plan Expansion (2022-2023)

Expand the Planned Giving Program Plan to reach more donor prospects, estate planners, and investment advisers to promote COS as a cause to be supported to increase the frequency and size of planned gifts donated to the District.

Leave Blank:

Implementation Timeline: 2020 - 2021, 2021 - 2022, 2022 - 2023

Leave Blank:

Leave Blank:

Identify related course/program outcomes: District Objective 4.2 - Improve organizational effectiveness by strengthening operations of and communication between District departments, divisions, and constituents

SAO Develop Additional District Resources - SAO remains the primary of focus for change. Most efforts can be categorized into two main categories: 1) Leveraging and perfecting existing methods of resource development (ie. fundraising events, investment

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income and scholarship donations) to improve overall income to the Foundation and, therefore, support to the District and our students. 2) Initiating or expanding new resource development channels (ie. Alumni gifts, capital gifts, planned gifts, etc.)

Person(s) Responsible (Name and Position): Tim Foster

Rationale (With supporting data): Planned giving is a key component in resource development efforts in higher education. Recent planned giving efforts have resulted in some substantial gifts, including one \$96,500, one \$43,000, one \$25,000, and multiple \$5,000+ gifts. Studies through CASE.org indicate that planned gifts offer the greatest effort/dollar outcome ratio of all resource development efforts. However these efforts can take a long time to pay off, so it is important to continue other resource development efforts for immediate needs while continuing to cultivate planned gifts. The most frequent large gifts to the COS Foundation are in the form of planned gifts. More can be done to put COS in the minds of those preparing their own estate plans or plans for others.

Priority: Medium

Safety Issue: No

External Mandate: No

Safety/Mandate Explanation:

Update on Action

Updates

Update Year: 2022 - 2023

06/13/2023

Status: Action Discontinued

The distribution list of the monthly Planned Giving newsletter surpassed 400 addressees, a 15% increase. Open rates exceed 30%. There has been no progress on networking with estate planners and investment advisors to date.

Impact on District Objectives/Unit Outcomes (Not Required):

Link Actions to District Objectives

District Objectives: 2021-2025

District Objective 1.1 - The District will increase FTES 2% from 2021 to 2025.

District Objective 2.1 - Increase the number of students who earn an associate degree or certificate (CTE and non-CTE) by 5% from 2021-2025.

Action: COS Alumni Engagement (2023-2024)

Expand the audience and effectiveness of content prescribed in the COS alumni engagement plan, including branding outreach, alumni network recruitment, engagement, and campaigning systems that may be properly sustained over time.

Leave Blank:

Implementation Timeline: 2023 - 2024

Leave Blank:

Leave Blank:

Identify related course/program outcomes: District Objective 1.1 - The District will increase FTES 2% from 2021 to 2025.

District Objective 2.1 - Increase the number of students who earn an associate degree or certificate (CTE and non-CTE) by 5% from 2021-2025.

District Objective 2.4 - Increase the percentage of CTE students who achieve their employment objectives by five percentage points (job closely related to field of study and attainment of a livable wage) and the number of CTE students who successfully complete 9+ CTE units in a single year by 10% from 2021-2025.

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

Rationale (With supporting data): Effective higher education resource development benefits from a functioning alumni engagement program. The COS Foundation has spent the last three years developing and implementing an alumni engagement plan. There are approximately 190,000 alumni of the College of the Sequoias. The College of the Sequoias supplied the COS Foundation with a digital database of directory information available from all students that attended COS Between the years of 1986-2018. From these records, the COS Foundation has been able to acquire 37,000 emails and 47,000 current mailing addresses of alumni. This new source of contact information will be enhanced annually with additional student directory

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information.

The three-year capital budget to develop and implement a COS Alumni Association brand alumni engagement strategy with a marketing firm experienced in two-year college campaigns is now complete and implemented.

Priority: High

Safety Issue: No

External Mandate: No

Safety/Mandate Explanation:

Resources Description

Personnel - Classified/Confidential - An additional staff member skilled in correspondence, event organization, and overall membership engagement will dramatically accelerate the level of alumni engagement and the overall number of alumni being reached by engagement activities. The associated tasks to do this are not enough to justify a full-time position. By adding tasks currently performed by the COS Foundation Director and the Accounting Technician, the director may engage in more highly skilled activities associated with major, planned, and capital gift cultivation and the accounting technician can improve the data capture and management of our expanded donor database and gift volume. The delegated duties would include event planning and execution, website development and content maintenance, newsletter content creation and distribution, and alumni database maintenance for a database that has grown 37 times larger with the addition of alumni directory information. (See attached task breakdown).

It is important to stress that this added resource will help achieve the strategic goals of the Foundation in more areas than just alumni engagement, as the overall tasks of this small department would be redistributed. Adding one full-time employee would be a 38% increase in human resources to the Foundation currently staffed at 2.6 FTEs.

The added staff resource is expected to quickly (within one to two years) generate contributions from resulting gifts to the Foundation to surpass the annual operating outlay requested of the District. The Return On Investment (ROI) for this position will be greater than the investment within two years. These gifts may manifest in the form of more significant project funding allocations, more scholarships, capital gifts, and any other resource need the District may call upon the Foundation to help secure to benefit the District and the students directly. But overall support of the Foundation could also be channeled to certain general fund expenses of the District to more directly offset the additional general fund outlay, if necessary.

(Active)

Why is this resource required for this action?: It is important to the structure of the COS Foundation that its personnel costs and the majority of its other operating expenses continue to be underwritten by the District as opposed to such expenses being underwritten by the Foundation. Fundraising for operating costs creates a whole new dynamic in how a case for support is portrayed to the community, and it shifts the priorities of staff. Staff would first need to raise their operating budget before any district priority. Foundations of California community colleges that must raise operating dollars institute schemes such as donation fees, funds held in trust fees, investment income assessments, and unique fundraising efforts specifically to underwrite operations. Doing so dilutes energy spent raising resources to donate to the college and students, as operating dollars must be the first dollars raised to sustain operations. Such factors can also diminish gifts to the college as donors learn that a portion of their donation will not go to their intended cause within the District. Avoiding these dynamics is why 4-year universities avoid such structures and generally underwrite the operations of the Foundation with the understanding that far more resources will be donated to the university than spent on these operating costs. Currently, less than \$60,000 of operational expenses are being underwritten directly by the Foundation. The revenue source to cover those expenses is investment income, so staff may avoid raising money for operations. The remaining investment income is used for annual gifts to the District and continued growth of the invested unrestricted capital balance.

Notes (optional): The cost estimate is strictly for personnel costs of a full-time classified position with a base salary of approximately \$60,000. Office space and other infrastructure already in place in the Foundation office to accept one more staff member. Other incidental operating expenses associated with this new staff position can be covered by Foundation investment income.

Notes (optional):

Cost of Request (Nothing will be funded over the amount listed.): 98000

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Related Documents:

[1 Foundation Org Chart Current-Future.pdf](#)

Link Actions to District Objectives

District Objectives: 2021-2025

District Objective 1.1 - The District will increase FTES 2% from 2021 to 2025.

District Objective 2.1 - Increase the number of students who earn an associate degree or certificate (CTE and non-CTE) by 5% from 2021-2025.

District Objective 2.4 - Increase the percentage of CTE students who achieve their employment objectives by five percentage points (job closely related to field of study and attainment of a livable wage) and the number of CTE students who successfully complete 9+ CTE units in a single year by 10% from 2021-2025.

Action: Planned Giving Program Plan Expansion (2023-2024)

Expand the Planned Giving Program Plan to reach more donor prospects, estate planners, and investment advisers to promote COS as a cause to be supported to increase the frequency and size of planned gifts donated to the District.

Leave Blank:

Implementation Timeline: 2023 - 2024

Leave Blank:

Leave Blank:

Identify related course/program outcomes: District Objective 4.2 - Improve organizational effectiveness by strengthening operations of and communication between District departments, divisions, and constituents

SAO Develop Additional District Resources - SAO remains the primary focus for change. Most efforts can be categorized into two main categories: 1) Leveraging and perfecting existing methods of resource development (i.e., fundraising events, investment income and scholarship donations) to improve overall income to the Foundation and, therefore, support to the District and our students. 2) Initiating or expanding new resource development channels (i.e., Alumni gifts, capital gifts, planned gifts, etc.)

Person(s) Responsible (Name and Position): Tim Foster

Rationale (With supporting data): Planned giving is a key component in resource development efforts in higher education. Studies through CASE.org indicate that planned gifts offer the greatest effort/dollar outcome ratio of all resource development efforts. However these efforts can take a long time to pay off, so it is important to continue other resource development efforts for immediate needs while continuing to cultivate planned gifts. The most frequent large gifts to the COS Foundation are in the form of planned gifts. More can be done to put COS in the minds of those preparing their own estate plans or plans for others.

Priority: Medium

Safety Issue: No

External Mandate: No

Safety/Mandate Explanation:

Link Actions to District Objectives

District Objectives: 2021-2025

District Objective 1.1 - The District will increase FTES 2% from 2021 to 2025.

District Objective 2.1 - Increase the number of students who earn an associate degree or certificate (CTE and non-CTE) by 5% from 2021-2025.

Action: Expand Funds (2023-2024)

Program Review - Foundation

Develop at total of eight endowment funds that represent support for major components of the college and areas of community support for the college. Have functioning committees for six of the eight funds.

Leave Blank:

Implementation Timeline: 2023 - 2024

Leave Blank:

Leave Blank:

Identify related course/program outcomes: District Objective 2.1 - Increase the number of students who earn an associate degree or certificate (CTE and non-CTE) by 5% from 2021-2025.

District Objective 2.4 - Increase the percentage of CTE students who achieve their employment objectives by five percentage points (job closely related to field of study and attainment of a livable wage) and the number of CTE students who successfully complete 9+ CTE units in a single year by 10% from 2021-2025.

District Objective 4.1 - Increase the effective use of data and transparency in decision-making at all institutional levels from 2021-2025.

District Objective 4.2 - Improve communication practices needed to support organizational effectiveness and continuous improvement across all District units and constituents from 2021-2025.

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

Rationale (With supporting data): The COS Foundation board members seek to positively impact an area of service the college provides to all the communities in the District. The early success of the Athletics Fund and the Local Heroes Fund has prompted the COS Foundation board to develop six more funds for a total of eight. These funds are Athletics, Local Heroes, Fine Arts, Student Services, Agriculture, Career Technical Education, Business and Science. Each fund will have an advisory committee commissioned by the COS Foundation board to advise the board. The primary purpose of these committees is to develop two essential precursors to asking for large sums of money: articulated need and strong stewardship. By developing a committee for each of these funds and filling the vacancies with volunteers who have specialized insight into the areas covered by the respective committees, the Foundation will be able to establish many opportunities to support the college and generate community confidence that a "forever gift" will forever benefit the college in the area(s) in which the donor intended.

Priority: Medium

Safety Issue: No

External Mandate: No

Safety/Mandate Explanation:

Link Actions to District Objectives

District Objectives: 2021-2025
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