

Santa Rosa Junior College

Program Resource Planning Process

Foundation 2024

1.1a Mission

The mission of the Santa Rosa Junior College Foundation is to align with the mission of the College by raising and stewarding funds to support programs, scholarships, facilities and special projects. In cooperation with the Sonoma County Junior College District, the Foundation enhances the quality of higher education in the communities we serve.

1.1b Mission Alignment

The SRJC Foundation's mission is aligned with the District's mission and college initiatives. The Foundation raises and administers funds to support student success, district-wide programs, facilities and faculty.

1.1c Description

The SRJC Foundation, a 501 (c) (3) nonprofit organization, is organized to encourage private gifts, trusts, and bequests for the benefit of Santa Rosa Junior College. A 19-member Board of Directors governs the SRJC Foundation. Its membership includes professional, business, and philanthropic leaders who have a dedicated interest in the well being of the college.

The Foundation manages more than 1,350 funds -- 400 endowed and 950 non-endowed. Giving programs include: SRJC Foundation Endowment, restricted and unrestricted non-endowed funds, the President's Circle and Annual Fund, Randolph Newman Legacy Society, and a variety of planned giving programs.

Four partner committees work with the foundation to raise funds and provide programs and services for alumni and friends of SRJC:

- Alumni and Friends Association
- AgTrust Committee
- Bear Cub Athletic Trust
- Friends of Petaluma

The SRJC Foundation employees six staff members:

- 1 100% - Executive Director
- 1 100% - Alumni Relations and Annual Fund Director
- 1 100% - Administrative and Events Assistant III
- 1 100% - Accounts Specialist
- 1 100% - Administrative Assistant II
- 1 70% - Administrative Assistant II
- 2 50% - STNC/Major Gift Fundraisers

1.1d Hours of Office Operation and Service by Location

The SRJC Foundation is open Monday through Friday, 8:00 AM to 5:00 PM.
The foundation office is covered during all opens hours.

1.2 Program/Unit Context and Environmental Scan

Fiscal Year 2011/12 the SRJC Foundation was ranked No. 1 in the nation for for fundraising by the Council for Aid to Education. The Foundation earned this ranking among the top 1,500 Community Colleges in the United States. The SRJC Foundation also remains the top California Community Colleges for total assests, total endowed assests, number and total of scholarship awards and alumni programming.

2.1a Budget Needs

The SRJC Foundtaion is self-supporting and requires no funding from the District.

The SRJC Foundation 13/14 projected operating budget is as follows:

Revenue: \$927,500
Expenses: \$919,455

Grant support to the College exceeds \$120,000

2.1b Budget Requests

| Rank | Location | SP | M | Amount | Brief Rationale |
|------|----------|----|---|--------|-----------------|
|------|----------|----|---|--------|-----------------|

2.2a Current Classified Positions

| Position | Hr/Wk | Mo/Yr | Job Duties |
|---|-------|-------|---|
| Accounts Specialist | 40.00 | 12.00 | General ledger, payables and receivables, database management, deposits, reconciliations, fund management. . |
| Administrative and Events Assistant III | 40.00 | 12.00 | Assistant to ED, Board and committee support, clerical, meetings and appointments, special projects, donor contact. Special event coordination. |
| Administrative Assistant II | 24.00 | 12.00 | Gift acknowledgements, data entry, gift processing, special event support, reception. Data queries and analysis. |
| Accounts Specialist | 40.00 | 12.00 | General ledger, payables and receivables, database management, deposits, reconciliations, fund management. . |
| Administrative Assistant II | 40.00 | 12.00 | General clerical, database functions, assist with alumni relations, office duties, committee minutes, etc. |

2.2b Current Management/Confidential Positions

| Position | Hr/Wk | Mo/Yr | Job Duties |
|---|-------|-------|---|
| Executive Director | 40.00 | 12.00 | Foundation administration, personnel management, fundraising and donor relations, board and committee support, SRJC management team, community relations. |
| Alumni Relations and Annual Fund Director | 40.00 | 12.00 | Development of alumni outreach programs, affinity marketing, communications, alumni events/activities, President's Circle and Annual Fund management, personnel supervision/evaluations, public presentations. |

2.2c Current STNC/Student Worker Positions

| Position | Hr/Wk | Mo/Yr | Job Duties |
|---------------------|-------|-------|---|
| | 0.00 | 0.00 | |
| Major Gifts Officer | 16.00 | 12.00 | Conduct 100th Anniversary Feasibility Study to raise funds in support of student and College needs. |
| Major Gifts Officer | 20.00 | 12.00 | Identify, cultivate and solicit gifts to support all areas of the College. |

2.2d Adequacy and Effectiveness of Staffing

The SRJC Foundation continues an aggressive strategy to secure major and transformational gifts to support essential needs at the College. With the recent hire of two part-time major gift officers, fundraising efforts have expanded to broader segments within the community.

The Foundation has proposed a focused fundraising Campaign in celebration of the College's 100th Anniversary.

2.2e Classified, STNC, Management Staffing Requests

| Rank | Location | SP | M | Current Title | Proposed Title | Type |
|------|----------|----|---|---------------|----------------|------|
|------|----------|----|---|---------------|----------------|------|

2.3a Current Contract Faculty Positions

| Position | Description |
|----------|-------------|
|----------|-------------|

2.3b Full-Time and Part-Time Ratios

| Discipline | FTEF Reg | % Reg Load | FTEF Adj | % Adj Load | Description |
|------------|-------------|---------------|-------------|---------------|-------------|
|------------|-------------|---------------|-------------|---------------|-------------|

2.3c Faculty Within Retirement Range

RS.EOF

2.3d Analysis of Faculty Staffing Needs and Rationale to Support Requests

2.3e Faculty Staffing Requests

| Rank | Location | SP | M | Discipline | SLO Assessment Rationale |
|------|----------|----|---|------------|--------------------------|
|------|----------|----|---|------------|--------------------------|

2.4b Rationale for Instructional and Non-Instructional Equipment, Technology, and Software

RS.EOF

2.4c Instructional Equipment Requests

| Rank | Location | SP | M | Item Description | Qty | Cost Each | Total Cost | Requestor | Room/Space | Contact |
|------|----------|----|---|------------------|-----|-----------|------------|-----------|------------|---------|
|------|----------|----|---|------------------|-----|-----------|------------|-----------|------------|---------|

2.4d Non-Instructional Equipment and Technology Requests

| Rank | Location | SP | M | Item Description | Qty | Cost Each | Total Cost | Requestor | Room/Space | Contact |
|------|----------|----|---|------------------|-----|-----------|------------|-----------|------------|---------|
|------|----------|----|---|------------------|-----|-----------|------------|-----------|------------|---------|

2.4f Instructional/Non-Instructional Software Requests

| Rank | Location | SP | M | Item Description | Qty | Cost Each | Total Cost | Requestor | Room/Space | Contact |
|------|----------|----|---|------------------|-----|-----------|------------|-----------|------------|---------|
|------|----------|----|---|------------------|-----|-----------|------------|-----------|------------|---------|

2.5a Minor Facilities Requests

| Rank | Location | SP | M | Time Frame | Building | Room Number | Est. Cost | Description |
|------|----------|----|---|------------|----------|-------------|-----------|-------------|
|------|----------|----|---|------------|----------|-------------|-----------|-------------|

2.5b Analysis of Existing Facilities

3.1 Academic Quality

—

3.2 Student Success and Support

Seeking and achieving diversity in a community college setting requires one to embrace a broad representation of experiences, perspectives, opinions and cultures and to encourage those around us to do the same. The very nature of creating an organizational culture that embraces diversity is to actively promote inclusiveness in the pursuit of our organization's mission.

The SRJC Foundation follows the recruiting guidelines and recommendations of the District's Human Resources Department and we ask all candidates how they work with and are sensitive to the diversity of our student population, our donor base, and the community we serve.

The Foundation encourages ongoing training and awareness for all employees.

3.3 Responsiveness to Our Community

In FY 12/13 staff attended trainings in the following areas:

Raiser's Edge Database Management
California Community College Symposium

In addition, classified employees are encouraged to take SRJC coursework as it relates to their position, attend staff development activities, and participate in external training courses/programs, as appropriate and needed.

3.4 Campus Climate and Culture

Foundation employs are provided updated safety and emergency information.

Safety trainings are offered to each employee.

Safe use of workstation and other equipment is demonstrated by District reps.

Building/Area Coordinators: Rebecca Merkley and Tina Laws

3.5 Establish a Culture of Sustainability

The Foundation staff participate in sustainable practices through recycling, composting, and re-use of paper and other products. All workstations have a recycling bin.

4.1a Course Student Learning Outcomes Assessment

NA

4.1b Program Student Learning Outcomes Assessment

NA

4.1c Student Learning Outcomes Reporting

| Type | Name | Student Assessment Implemented | Assessment Results Analyzed | Change Implemented |
|------|------|--------------------------------------|--------------------------------|-----------------------|
|------|------|--------------------------------------|--------------------------------|-----------------------|

4.2a Key Courses or Services that address Institutional Outcomes

| Course/Service | 1a | 1b | 1c | 2a | 2b | 2c | 2d | 3a | 3b | 4a | 4b | 5 | 6a | 6b | 6c | 7 |
|----------------|----|----|----|----|----|----|----|----|----|----|----|---|----|----|----|---|
| | | | | | | | | | | | | | | | | |

4.2b Narrative (Optional)

5.0 Performance Measures

In the past five years, the Foundation has raised/stewarded more than \$20.6 million.

In FY 12/13 the Foundation secured a \$2M Charitable gift Annuity and an additional \$1M for student scholarships

12/13 \$4,859,050

11/12 - \$7,620,477

10/11 - \$3,011,981

09/10 - \$2,762,950

08/09 - \$5,323,256

07/08 - \$1,763,080

06/07 - \$2,523,052

05/06 - \$2,720,161

04/05 - \$2,521,072

6.1 Progress and Accomplishments Since Last Program/Unit Review

| Rank | Location | SP | M | Goal | Objective | Time Frame | Progress to Date |
|------|----------|----|----|---|--|------------|------------------|
| 0001 | ALL | 00 | 00 | Endowment Building Campaign: Increase contributions to endowment and total assets by at least \$3M from \$46 to \$49M. | 1.1 Secure transformational (\$500K+) and major gifts (\$25K+) from current donors. 1.2 Prospect, cultivate and secure 10 major gifts from 10 new donors. 1.3 Task foundation board members with cultivation and donor referrals 1.4 Implement marketing program to provide public exposure for foundation. | FY 14/15 | |
| 0001 | ALL | 00 | 00 | Targeted Fundraising Programs: Begin implementation of targeted fundraising projects to address critical needs and align with College's 100th Anniversary Celebration. | 2.1 Work in collaboration with identified College partners to create specific fund development plans for next 3-4 years. 2.2 Assign Foundation fundraisers to project areas. 2.3. Develop integrated collateral across project areas and aligned to PR/College's 100th Anniversary promotions. | FY14/15 | |
| 0001 | ALL | 00 | 00 | College Instructional and Program Support: Secure funding for areas of greatest needs in college departments and programs. | 3.1 Work with college representatives to identify areas of instructional and program funding needs. 3.2 Prospect, identify, cultivate and secure gifts to support college priorities other than student scholarships. | FY 14/15 | |
| 0001 | ALL | 00 | 00 | Naming and Instructional Projects: Continue toward goal to complete named gifts in Bertolini Student Center, Culinary Arts Center and Petaluma Campus. | 4.1 Continue to cultivate and esecure gifts for building endowments. 4.2 Actively involve Foundation board members to assist with fundraising in specified areas. | FY 14/15 | |

| Rank | Location | SP | M | Goal | Objective | Time Frame | Progress to Date |
|------|----------|----|----|--|---|------------|------------------|
| 0001 | ALL | 00 | 00 | Corporate Relations Program: Design and implement a corporate relations effort to attract financial and other corporate resources to the College. | 5.1 Provide resources, leadership support and guidance to corporate relations manager. 5.2 Assist with the development and implementation of the program. 5.3 Integrate the corporate relations program into Foundation fund development goals. | FY 14/15 | |
| 0001 | ALL | 00 | 00 | Foundation Support to Partner Committees & Special Projects: Hire a Development Manager to provide fundraising support to AgTrust, BCAT, FOPCT, and other special projects. | 6.1 Recruit and retain qualified Development Manager by November 2014. 6.2 Identify projects and specific fundraising goals. 6.3 Ensure full understanding of manager's role and responsibilities with committees/projects. | FY 14/15 | |
| 0001 | ALL | 00 | 00 | Marketing: Hire part-time marketing and social media coordinator to assist Foundation with marketing and outreach. | 7.1 In collaboration with PR recruit and retain qualified marketing and social media coordinator by October 2014. 7.2 Assist with development of marketing plan. 7.3 Assign ongoing projects, i.e. JC Connect, Foundation Annual Report, Web site, etc. | FY 14/15 | |

6.2b PRPP Editor Feedback - Optional

—

6.3a Annual Unit Plan

| Rank | Location | SP | M | Goal | Objective | Time Frame | Resources Required |
|------|----------|----|----|---|--|------------|--------------------|
| 0001 | ALL | 00 | 00 | Endowment Building Campaign: Increase contributions to endowment and total assets by at least \$3M from \$46 to \$49M. | 1.1 Secure transformational (\$500K+) and major gifts (\$25K+) from current donors. 1.2 Prospect, cultivate and secure 10 major gifts from 10 new donors. 1.3 Task foundation board members with cultivation and donor referrals 1.4 Implement marketing program to provide public exposure for foundation. | FY 14/15 | |
| 0001 | ALL | 00 | 00 | Targeted Fundraising Programs: Begin implementation of targeted fundraising projects to address critical needs and align with College's 100th Anniversary Celebration. | 2.1 Work in collaboration with identified College partners to create specific fund development plans for next 3-4 years. 2.2 Assign Foundation fundraisers to project areas. 2.3. Develop integrated collateral across project areas and aligned to PR/College's 100th Anniversary promotions. | FY14/15 | |
| 0001 | ALL | 00 | 00 | College Instructional and Program Support: Secure funding for areas of greatest needs in college departments and programs. | 3.1 Work with college representatives to identify areas of instructional and program funding needs. 3.2 Prospect, identify, cultivate and secure gifts to support college priorities other than student scholarships. | FY 14/15 | |
| 0001 | ALL | 00 | 00 | Naming and Instructional Projects: Continue toward goal to complete named gifts in Bertolini Student Center, Culinary Arts Center and Petaluma Campus. | 4.1 Continue to cultivate and esure gifts for building endowments. 4.2 Actively involve Foundation board members to assist with fundraising in specified areas. | FY 14/15 | |

| Rank | Location | SP | M | Goal | Objective | Time Frame | Resources Required |
|------|----------|----|----|--|---|------------|--------------------|
| 0001 | ALL | 00 | 00 | Corporate Relations Program: Design and implement a corporate relations effort to attract financial and other corporate resources to the College. | 5.1 Provide resources, leadership support and guidance to corporate relations manager. 5.2 Assist with the development and implementation of the program. 5.3 Integrate the corporate relations program into Foundation fund development goals. | FY 14/15 | |
| 0001 | ALL | 00 | 00 | Foundation Support to Partner Committees & Special Projects: Hire a Development Manager to provide fundraising support to AgTrust, BCAT, FOPCT, and other special projects. | 6.1 Recruit and retain qualified Development Manager by November 2014. 6.2 Identify projects and specific fundraising goals. 6.3 Ensure full understanding of manager's role and responsibilities with committees/projects. | FY 14/15 | |
| 0001 | ALL | 00 | 00 | Marketing: Hire part-time marketing and social media coordinator to assist Foundation with marketing and outreach. | 7.1 In collaboration with PR recruit and retain qualified marketing and social media coordinator by October 2014. 7.2 Assist with development of marketing plan. 7.3 Assign ongoing projects, i.e. JC Connect, Foundation Annual Report, Web site, etc. | FY 14/15 | |