

Santa Rosa Junior College

Program Resource Planning Process

Foundation 2014

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 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 recievables, 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 Rational for Instructional and Non-Instructional Equipment, Technology, and Software

RS.EOF

2.4c Instructional Equipment and Software Requests

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

2.4d Non-Instructional Equipment, Software, and Technology 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 Develop Financial Resources

3.2 Serve our Diverse Communities

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 Cultivate a Healthy Organization

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 Safety and Emergency Preparedness

Foundation employees 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	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 Collaborate with Board members to cultivate and secure gifts 1.4 Implement marketing program	FY 12/13	
0001	ALL	00	00	100th Anniversary Campaign	2.1 Determine College long term needs. 2.2 Conduct feasibility study to determine levels of support. 2.3. Involve College community in Campaign	FY 12/13	
0001	ALL	00	00	College Program Support	3.1 Identify instructional and program needs 3.2 Involve College leaders in fund development 3.3 Implement new approaches to identify and cultivate donors	FY 12/13	
0001	ALL	00	00	Naming Program	4.1 Identify prospects/donors for naming opportunities in bertolini, Culinary, Petaluma 4.2 Provide additional opportunities to donors, i.e. Burbank Auditorium 4.3 Include in Anniversary Campaign	FY 12/13	

6.2a Program/Unit Conclusions

Location	Program/Unit Conclusions
ALL	

6.2b PRPP Editor Feedback - Optional

Dr. Frank Chong

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.	FY 14/15	
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 secure gifts for building endowments. 4.2 Actively involve Foundation board members to assist with fundraising in specified areas.	FY 14/15	
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.	FY 14/15	

					7.2 Assist with development of marketing plan. 7.3 Assign ongoing projects, i.e. JC Connect, Foundation Annual Report, Web site, etc.		
--	--	--	--	--	--	--	--