



# Southwestern Oregon Community College

## Success Indicator 42 Foundation Annual Fundraising

2012- 2013

### ACHIEVEMENT

Achieved: 11% - **Green**

### CORE THEME

Community Engagement

### OBJECTIVE

**CE.3:** Our community members participate and contribute to the Foundation in support of the college

### INDICATOR

**CE.3.1: Success Indicator 42 – Foundation Annual Fundraising**

Measured by the amount of scholarship raised from annual fundraising events from internal reports and audited final figures

### Indicator Thresholds

Green: 5% or greater      Yellow: Between -5% and 5%      Red: Below -5%

### Purpose and Meaning

The amount of increase in dollars raised will demonstrate how well the Foundation has been able to connect with the population that values the educational and cultural opportunities provided by the college in the region.

## WHAT WAS ACHIEVED AND WHAT IS PLANNED FOR THE FUTURE

In the most current year approximately \$290,392 was raised which is 11% higher than the 3 year average. This total does not include the dollars raised in the capital campaign for the Curry Campus. The Foundation will continue the success of the Superhero Campaign with the goal of reaching contributions or pledges of \$10,000 from each of 5 donors. Concurrently, the Foundation will communicate with existing annual donors to secure their continued annual donations. The staff conducted a successful Superhero campaign and reached the goal of \$50,000 in gifts and pledges. The “Endowment Fund Study” whose purpose was to align the Foundations endowment accounting with UPMIFA standards required months of staff time that would otherwise have been spent on the annual fundraising.

## FACTORS AFFECTING RESULTS/PROGRESS

The staff and board member worked carefully with a donor on an unusual gift giving the donors confidence in the Foundation as a beneficiary. There was an unusual gift of \$100,000 from a church group that was gifted a portion of their assets after dissolving their corporation. The Foundation will be looking for more opportunities for unusually large gifts.

## NWCCU Accreditation Recommendation Response: Continue to refine thresholds

The 2012-13 thresholds were established as part of the continuous improvement process during the accreditation process to address recommendations and Standard 1 of the Year One Report to the Northwest Commission on Colleges and Universities. In response to recommendations from the peer evaluators to the Year One Report to the Commission (NWCCU) that the College continue to refine indicator thresholds, the thresholds for the academic year 2013-2014 and future are modified as follows:

Green: \$200,000

Yellow: Between \$100,000 and \$199,999

Red: Below \$100,000

The measure has also been modified to precisely indicate the data used to calculate the thresholds as follows:

Measured by the three-year average amount of scholarships raised from annual fundraising events as reported by the foundation from foundation raised funds.

Measurement of a three-year average is designed to consider donations over time and allows for variations from year to year wherein a specific campaign or unusually high donations may occur.

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### Planning Priorities

**Strategic Goal - 8:** Sustain and build strong community, business, and agency partnerships

**Annual Priority - 8.2:** Create and sustain educational partnerships to promote shared resources for seamless education opportunities

**Institutional Planned Accomplishment - 8.2A:** Improve communication and involvement with community stakeholders – e.g. school districts, business and industry

### Unit Planning

Continue the Superhero campaign for an additional year. Develop the campaign plans for the new Health Sciences building. Hire a new Foundation Director.

### Budget Impact

Annual Fundraising from the private sector helps the college provide for operating revenues for continued fundraising activities, helps with program and equipment costs and supports students with scholarship monies for books, fees and tuition.

### Achievement Analysis

Several activities robbed the amount of time spent on the annual fundraising, including time spent on researching the endowment calculations and supporting the endowment fund study conducted by Gary McGee and Company. The coming year should prove to be more successful without the need for extensive fund accounting analysis.

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## DATA DOCUMENTATION

### *Documentation Posted:*

SOCC Mission Fulfillment Reports Website at: SOCC Mission Fulfillment Reports Website at: <http://www.socc.edu/ie/pgs/success-indicators/index.shtml>

TracDat Assessment Software: Success Indicators 2012-13 folder

### *Data References:*

Foundation fund accounts (TB Financials) provided by Kim Phelps of Michael Gordon CPAs; Excel comparison chart located on the network: itt\institutionalresearch\succcessindicators\si\_42\_foundationfundraising

## ABOUT THE DATA

The report and chart information was prepared and coordinated by Karen Pringle, Foundation Executive Director, Cathy Chisum, Foundation Office Coordinator, and Robin Bunnell, Institutional Researcher.

Contributions to the narrative were supplied by Karen Pringle, Executive Foundation Director and Cathy Chisum, Foundation Office Coordinator.

### Requirements

NWCCU Accreditation; Foundation Plan.

For more detailed information, contact the Institutional Research office - [ir@socc.edu](mailto:ir@socc.edu)