



ACHIEVEMENT

Achieved: \$95,371.33 =



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

Indicator Thresholds

Green: \$200,000 Yellow: Between \$100,000 and \$199,999 Red: Below \$100,000

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

The Foundation brought in donation revenues of \$149,575 for grants and scholarships with a three-year average amount of \$95,371.33 indicating achievement within the red threshold. The Foundation will continue to actively engage college staff members to contribute to scholarships and programs to increase employee participation to 10 percent or greater. The Foundation held no fundraising events in the 2013-14 fiscal year, but the Foundation Board will host a new annual fundraising event in January. The Foundation also will complete the Forestry Program campaign and implement the campaign plans for the Health & Science Building.

FACTORS AFFECTING RESULTS/PROGRESS

The Foundation finalized its Superhero Campaign, adding an additional commitment with \$3,500 paid toward a \$10,000 pledge. The Foundation operated six months without a director, which hindered its ability to actively solicit donations and assist donors with giving plans. A new director is in place and will renew endowment and gift solicitation. The Foundation received approximately \$113,000 due to the surrender of an insurance policy the Foundation held on the part of a donor. The donor gifted the policy to the Foundation in 1999 and this was the culmination of that giving plan. After the close of the fiscal year, the Foundation Board decided to allocate \$100,000 of those funds to endowments to fund scholarships.

Success Indicator Changes for 2014-15 supporting NWCCU accreditation standards: 1.B.2; 4.A.1; 4.B.1; 5.B.2

For 2014-15 the measurement indicator will be changed to measure all of the revenues contributed to the Foundation and as restated below:

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

Planned Projects

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

Project CE3.1: Expand access to financial assistance

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

Budget Impact identifies the budget requests needed in the future year(s) to support the planned changes.

Annual fundraising from the private sector and individual donors help provide the college with program development, equipment purchases and scholarships that support students in paying for tuition, books and fees.

Achievement Analysis

In the coming year with a new executive director and active events/marketing committee, the Foundation will host an annual fundraising event and increase outreach, resulting in more support. In analyzing the report, the success indicator is limited by the measurement of only “grants and scholarships,” however the foundation also engages the community for program contributions that are neither grants nor scholarships. Next year, those contributions will be measured and computed in the three-year average – a more accurate reflection of community outreach and fundraising.

DATA DOCUMENTATION

Documentation Posted:

Portal: Resource Center Core Themes – Objectives – Success Indicator Page:

https://mylakerlink.socc.edu/ICS/Resource_Center/Core_Themes_-_Objectives_-_Success_Indicators.jnz?portlet=Handouts_2014-09-17T12-15-51-67

Assessment Software: Success Indicator 42 Report – execute report for specified year

Data References:

Foundation fund accounts (TB Financials) provided by Kim Phelps of Michael Gordon CPAs; Excel comparison chart located on the network: itt\institutionalresearch\successindicators\si_42_foundationfundraising

ABOUT THE DATA

The report and chart information was prepared and coordinated by Elise Hamner, Foundation Executive Director and Robin Bunnell, Institutional Researcher.

Contributions to the narrative were supplied by Elise Hamner, Executive Foundation.

DETERMINING MEASUREMENT AND SETTING THRESHOLD LEVELS

The Foundation determined measurement of this indicator by looking at the five-year pattern of contributions. Selection of a three-year average measurement considers fluctuations of the amounts contributed that traditionally have occurred due to economic conditions and other. The thresholds represent current expectation levels consistent with Foundation goals and economic conditions. The measurement and thresholds require yearly review to ensure the indicator provides meaningful and applicable data to be used in decision making, specifically for planning and budget development.

Requirements

NWCCU Accreditation; Mission Fulfillment; Foundation Plan.

For more detailed information, contact the Institutional Research office - ir@socc.edu

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