THE A-TEAM
CHARTING A NEW COURSE

Abdul Adris
Operating Officer

Shana Carter
Stewardship Program Assistant

Carlos Watkins
Development Officer
SJECCD FOUNDATION
EXECUTIVE COMMITTEE

Donald Young, Chair

Joe Vela, Vice Chair

Lamar Thorpe, Institutional Advancement Officer

Carol Coen, Vice Chancellor
Workforce, Economic and Resource Development
Strong community engagement; over 200 guests in attendance!
- 22% increase in total sponsorship contributions

- $60,500 in pledges and commitments

- Established 12 new named scholarships

B2F increased availability of scholarships by 34% district wide
Secured 23 sponsorships
Strong Campus Engagement

• METAS
  • Cosmetology
    • Adult Education
      • Journalism and Photography
    • YESS
Compelling Student Stories and Guest Speakers

- Derrick Newton, EVC
- Armando Cervantes, SJCC
- Maria Jimenez, EVC
- Troung Mai, SJCC

Kevin Jensen, Alumnus Speaker
Cem Erdem, Keynote Speaker
SAVE THE DATE:

Bridge to the Future 2015
Mid-August!!!
BRIDGE TO THE FUTURE 2015
PROSPECT. CULTIVATE. ASK!!!

Prospecting:
• Build a list using your personal and/or professional network
• Your job, Chamber of Commerce, Rotary, etc.
• Review list with an Advancement Representative i.e. Lamar or Carlos
• Advancement Reps either qualify or disqualify prospects

Cultivate:
• Invite prospect/s to a non-ask event/s
• VIP Basketball Receptions –
• Feb 14th or 21st
• District Office Grand Opening – Feb 26th
• Dinner with the Chancellor or Presidents
• Graduations Ceremonies – May
• Personal Visit with Advancement Rep.
Keeping our house in legal and financial order
SCHOLARSHIP COMPLIANCE REVIEW PROCESS

- Developed a new process for awarding scholarships in collaboration with both campus Financial Aid Offices

- Established 4 new scholarship accounts for scholarships that were previously awarded through trust accounts

- Ensured all scholarships had clear award criteria, were in compliance and have recorded information
  - Updated 18 accounts through individual visits with donors and/or account signors
  - Determined 4 accounts needed to be closed
PAYROLL QUALITY ASSURANCE REVIEW

• Ensured every payroll deduction comports to the employee’s wishes

• 89 payroll enrollees who will be stewarded
  o Annual thank you and tax deductible receipt
  o Honored by inclusion in either 1921 or 1975 Societies
    ▪ Invitations to special events
    ▪ Listed on donor honor roll
FOUNDATION FINANCIAL STATUS

$1.4 million in Net Assets

SVCF: $1,037,737.18
Santa Clara County: $314,723.98
Wells Fargo: $34,914
LIABILITIES

- Trust Accounts: $488,597
- Scholarship Accounts: $404,762
- Endowed: $297,646
- Unrestricted: $147,890
What does that mean for Advancement?
1. Establish a base line for annual fundraising

2. Identify, track and steward current and prospective donors

3. Develop an integrated operating system that supports foundation, district and campus efforts
ANNUAL FUND CAMPAIGN

- Collaboration with campus leaders and department heads
- Developed a temporary alumni data-base
- Engaging alumni (i.e. 1-1 visits, non-ask events)
- Runs through June 30th; public launch DO Grand-Opening
- Key to campaign – affinity engagement
STEWARDSHIP

1. Gift acceptance forms agreeable to gift policies
2. Timely correspondence to donors – thanking and articulating how gift is being used
3. Recognition opportunities
   - Events
   - Giving societies (1921 and 1975 Societies)
   - Donor rolls and other external communications
4. Reporting back to donor about impact of gift
ALUMNI ENGAGEMENT

Gino Biorgioli
MHUSD Trustee; former VP Bank of America

Pricilla Francine Wright
Make-Up Artist

Josue Garcia
S.C. & S.B. Counties BCTC

Cassandra Staff
Director, Global Social Benefit Institute

Dan Orloff
Orloff Williams Strategic Marketing

Jose Salcido
Senior Policy Advisor
former Mayor Chuck Reed

Everett & Marilyn Randolph
Betty Howard Memorial Scholarship