A Message from the Vice Chancellor

The District is proud to have a stellar team of talented and driven professionals known as the A-Team. We’ve had a long history of philanthropy, but now we’re moving into a new era that will transform our fundraising and alumni relations efforts into greater support. We are demonstrating that we wholeheartedly value the relationships of donors and stakeholders, especially students. As the Vice Chancellor for Workforce, Economic and Resource Development, I am excited to work alongside such committed individuals and support their endeavors in strengthening our District.

-Carol Coen

Charting a New Course: Building the A-Team

The end of December not only marks the end of our second quarter but completes my sixth month as our District’s Institutional Advancement Officer (IAO). My goal is to build a well-functioning Advancement Team (A-Team) that’s creating and strengthening relationships with the communities we serve to encourage advocacy, financial investment and support for the District and its mission.

In this short period, I’m proud to report that the A-Team has grown to include two temporary positions. Carlos Watkins, our new development officer and Abdul Idris our operations officer. Shana Carter continues to support the team as our Stewardship Program Assistant. Together, we’re working to advance the District by developing the infrastructure to support philanthropic investment, establish open two-way communication with our stakeholders, involve our partners, and inspire a culture of giving among alumni, faculty and staff to move us closer to becoming a premier institution for advancing opportunity,... Cont. P. 2
A-Team From P. 1:

As we work to chart a new course for the future, the A-Team has been working tirelessly to develop three critical areas that will be the underpinning of the Advancement Office. First, we are establishing a base line for annual fundraising among key constituency groups by launching our first Annual Fund Campaign. Second, we are identifying and tracking current and prospective donors so that we may begin recognizing and thanking donors in a timelier and consistent basis through our Stewardship program. And third, we are integrating our gift processing, donor management, accounting and payroll systems into one comprehensive operating system that will dramatically increase data and reporting integrity and give us the capability of making data-driven decisions.

Please note that the SJECCD Foundation is the District’s vehicle for collecting and processing donations. And as such, the A-Team is here to build and maintain meaningful relationships on behalf of the District that result in external support like philanthropy.

Currently, as part of our responsibility in overseeing the SJECDD Foundation, we manage an estimated 170 scholarship and trust accounts, each with a specific customer base that requires good customer service; check processing and disbursements; scholarship awarding; quality assurance; and compliance measures based on the Financial Reporting Standards Board (FASB), Council for Advancement and Support of Education (CASE) and Internal Revenue Service (IRS) reporting standards. Conservatively speaking, the administration of these accounts makes up about 65% of the Team’s workload.

Our short-term goal is to reduce the time committed to these accounts by streamlining current processes, developing an integrated operating system, building collaborative working relationships with our Financial Aid Offices and campus deans, and designing and funding a position that is solely dedicated to advancement operations (gift processing, reporting, payroll and accounting). This will ensure that the A-Team can dedicate 80 to 90% of our workload to building relationships, making solicitations, external communications and stewarding donors.

Obviously, there is a lot the A-Team is developing that is critical to building a sustainable Advancement Office and there are current processes that also must be integrated with our overall goals.

That being said, I’m happy to report that the A-Team has worked diligently in the last three months to complete a Scholarship Compliance Review Process, headed by Carlos, to ensure all of the Foundation’s scholarships have clear award criteria, are in compliance with IRS reporting standards, and have identified donors. As a result of this process, the A-Team is proud to have increased scholarship availability by 34% District wide, and developed and implemented new processes that have streamlined the awarding of scholarships in collaboration with campus Financial Aid Offices.

I’m also happy to report that we’ve completed an extensive and detailed examination of our 2013-14 financial records led by Abdul. As a result, the A-Team brought our 2013-14 financial records into audit compliance. Please note that this process is not over. Together, we must now complete the same process for fiscal year 2014-15 to … Cont. P. 4

THE 2015 ANNUAL FUND CAMPAIGN

Annual Fund From P. 1:

When I joined the District’s Advancement Team 4 months ago, I began to build an annual fund program from the bottom up.

I started by collaborating with campus departments and programs to develop lists of potential constituency groups. This was necessary so that we could engage our alumni based on their affinity. Also, I developed a temporary alumni database by working with the office of Institutional Effectiveness and Student Success. Lastly, I began to engage a few alumni willing to volunteer their time.

This January we will launch our first annual fund campaign. The campaign will run through June 30th, 2015. The key to the campaign will be based on affinity engagement, particularly with our alumni.

Therefore, the campaign will interface with prospective donors including alumni, faculty, staff, and students, depending on school. For example, individuals who are constituents of EVC, may be asked to contribute to the EVC Annual Fund. Or, if an individual is a constituent of SJCC, he or she may be asked to make a contribution to the SJCC Annual Fund. All others may be asked to give to the Annual Fund.

Please note, my colleague Shana Carter will discuss donor recognition and stewardship in one of the following articles, which goes hand-in-hand with our annual fund campaign. Cont. P. 3
Bridge to the Future 2014

This year’s 3rd Annual Bridge to the Future benefit luncheon was a huge success on all fronts. This year’s theme was titled: A Courageous Journey. This theme was selected to shed light on the very challenging journeys many of our students take in order to receive an affordable and quality education.

During the lunch, we honored and recognized our donors for their continued support. In return, our donors got the opportunity to hear from the students who directly benefit from their philanthropy. The event received over 20 sponsorships that totaled an estimated $60,000.00 an increase of 22% from the previous year.

Thanks to the work of Shana and Carlos, the event was orchestrated flawlessly. This year’s event was preceded by a special pre-reception that included a jazz-quartet and showcase of some of our District’s finest students and programs.

As a result, this year, the SJECCD Foundation will be awarding 13 new student scholarships ranging between $750 and $1000. Thank you to those who attended and see you at the 2015 event!

An Eye on Stewardship

Often times we’re blinded by the perception that we have to constantly keep an eye out for new donors. Part of having a healthy individual giving program, like our new annual fund campaign, requires it. But, what is also required is our ability to retain current donors. So, we have to keep an EYE on donor stewardship.

At the center of donor stewardship is the idea of building deeper and meaningful relationships with our donors. This means we have to ensure a plan is in place for thanking and communicating with our donors.

The last few months, I’ve been working on building a strong stewardship program to support all of our fundraising efforts including Bridge to the Future, annual fund campaign and the retention of current donors (irrespective of where they designate their gift).

The Advancement Team’s plan includes four elements:

- First, proper gift acceptance forms to ensure donations are agreeable to the SJECCD Foundation’s gift policies;
- Second, timely correspondence to donors thanking them for their gift on behalf of the District and Foundation that clearly articulate where the gift has been designated and for how much;
- Third, recognition opportunities including events, giving societies... Cont. P. 4

Annual Fund From P. 2:

I’m also happy to announce that Josie Gutierrez an alum of SJCC and Maria Duran an alum of EVC will both serve as our honorary Alumni Association Chairs for this important inaugural campaign.

If you’re interested in making your first annual fund donation or volunteering, please feel free to contact me directly.

Carlos Watkins
Development Officer
carlos.watkins@sjeccd.edu
408-918-5109/direct
A-Team From P. 2:

ensure both fiscal years are aligned and stand future audit mandates.

Finally, I’m happy to report that Shana is currently heading up our Payroll Deduction Quality Assurance Review. This review is to ensure every payroll deduction that is being administered by the Payroll and Advancement Offices comports to the employee’s wishes as a donor. This process is scheduled for completion by the end of January 2015. In addition, starting in January of 2015, every payroll deduction enrollee will receive a gift receipt letter that states their total contribution for the previous year, where your contribution is designated and a THANK YOU and recognition for your generosity.

The A-Team is grateful for the opportunity to serve our District. We look forward to 2015!

-Lamar Thorpe

Stewardship From P. 3:

(for example, the 1921 or 1975 Society, which honors annual donors), honor rolls, external publications, etc.

- Fourth, reporting back to the donor about the impact of their gift to the mission of our District and the lives of our students.

The 1921 Society and 1975 Society are named in honor of the founding year of each of our respective colleges.

These giving societies have been established to celebrate the philanthropic leadership of current and future donors and build affinity among SJCC and EVC alumni, friends and students.

Each society will have three levels of recognition, as follows:

- SJCC's 1921 Society:
  - Jaguar Pride Level - under $2500
  - President's Level - $2500-$9999
  - Chancellor's Level - $10,000+

- EVC's 1975 Society:
  - Hawk Pride Level - under $2500
  - President's Level - $2500-$9999
  - Chancellor's Level - $10,000+

Anyone who made a contribution on or after July 1, 2014, is a member of a giving society depending on your gift designation.

Starting in 2015, society members will begin to receive correspondence from their respective giving society.

Operations: Gift Processing, Payroll & Accounting

The purpose of Advancement Operations is to manage the day-to-day operations of the SJECCD Foundation as our legal vehicle that receives, manages and distributes all private gifts, restricted and unrestricted, for the benefit of the District including both colleges and the Workforce Institute. The Foundation provides funds from private sources to a variety of District departments, programs and student groups. The primary source of revenue is from contributions and their investment return. In my role as the Operating Officer, I record all financial transactions including gift processing, preparing financial reports, disbursing checks, and other financial transactions. The Foundation follows the procurement and reporting policies and procedures of the District, FABS, CASE and IRS.

Currently, the Foundation is home to over 170 scholarships and annual (trust) accounts totaling over $1.4 million that go directly to student enrichment activities and support programs. Since the beginning of fiscal year 2014-15 to end of Quarter 2 the Foundation has raised $110,103.85 in annual contributions. No endowment gifts have come in for quarter 1 and 2.

The breakdown is as follows:

Q1 (Jul 1 – Sep 30): $74,324.96
Q2 (Oct 1 – Dec 31): $35,778.89

Total: $110,103.85

If you have any questions, feel free to contact me.

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Abdul Idris
Operating Officer
Abdul.idris@sjeccd.edu
408-918-5110/main line

Shana Carter
Stewardship Program Assistant
shana.carter@sjeccd.edu
408-918-5110/direct