

Educational Planning Committee Report for Academic Year 2016-2017

Please keep the report to a maximum of 2 pages for each objective.

1. EMP Recommendation and Objective (Include narrative from 2015-2018 strategic plan)

Objective 1: Increase philanthropic support to address unfunded needs in the form of scholarships, endowments, academic student support programs and facilities within three years.

Performance Indicator 1.1: Increased number of donors in two years. Baseline for FY 2014-15 is 503 total donations, 416 unique donors. FY 2015-16: 644 total donations, 391 unique donors.

Performance Indicator 1.2: Increased number and dollar amount of gifts, grants and other forms of philanthropic support in two years. FY 2014-15 baseline is \$333,697* (COM Advancement) and \$38,066 to the COM Foundation (both figures unaudited).

*\$405,850 was the amount originally cited as COM Advancement baseline. In a review of the funds included in that figure, Fiscal Services determined that ASCOM monies should not be counted towards the total and the figure of \$333,697 is to be used.

The FY 2015-16 totals are \$555,648 (COM Advancement) and \$47,815 to the COM Foundation (unaudited figures)

2. What actions have been taken toward achieving the objective? Please describe (reference action steps when relevant).

For reference: Action Step 1.1: Maintain and grow positive relationships with current and potential donors and funding agencies. **Action Step 1.2:** Secure new gifts and grants.

Donor Outreach and Solicitation

- Ongoing outreach to COM Foundation (COMF) donors through emails from the President, individual meetings and presentations to review status of the COMF and particular endowment funds. (1.1)
- Personalized thank-you cards from more than 100 student scholarship recipients sent to 45 donors. (1.1)
- Created quarterly "[Advancement eNotes](#)" emailed to donors, alumni and friends, and COM employees.
- Re-established President's Circle- for those donors who make donations of \$1,000 or more. Direct mail to donors and prospective donors representing \$80,000 in contributions during 2015-16. (1.2) Special COM enameled pins and thank-you letter from President Coon sent to each donor.
- Pillars of Philanthropy to honor donors who have made gifts of \$100,000 or more, whether current or planned. The Pillars donor wall is located near the Student Services Center and Fusselman Hall. In 2015-16, added two more members of the Pillars of Philanthropy (1.1, 1.2)
- Launched the 1926 Legacy Society in conjunction with COM's 90th Anniversary, with mailing to alumni, donors, ESCOM members and estate planning professionals. To date, COM has been notified of estate plan commitments in excess of \$5.25 million. Discussed planned giving with donors who wish to include COM in their estate plans. (1.2)
- #GivingTuesday to celebrate the act of giving back and encourage alumni, donors, employees and prospective donors to give, no matter the amount. Direct mail, email, tweets and posts to encourage people to give to COM. (1.2)

Advancement Operations

- Online giving—transitioned to a different web application for secure, user-friendly online giving with PayPal as gateway vendor. (1.2)
- Use of Affinaquest, a Salesforce platform, customer-relation donor database, to keep donor records and track donations, process thank-you receipts. Annual download of COM graduate contact information. (1.2)

- Wealth screening through DonorSearch completed to identify donors and prospective donors with a wealth capacity to give major and planned gifts. (1.2)
- With assistance of campus interview committee, hired Administrative Assistant, Connie Siegenthaler, who started on December 1, 2015.
- In collaboration with the Enrollment Services, COM launched AcademicWorks in June 2016 to manage the scholarship program, a process that includes online application, screening of applications, and awarding scholarships. More than \$147,000 in 223 scholarships awarded through this new system. (1.1, 1.2)
- In team with President Coon, provided information on the COMF endowment funds regarding legal documents and correspondence to the auditors.(1.1)
- Launched new [Advancement web pages](#) on new COM platform, with updated copy, images, video and forms. (1.1, 1.2)

Outreach to Private Foundations

- Outreach to Marin Community Foundation (MCF) to inform philanthropic advisors of opportunities for their clients to support COM. Connection yielded introduction to the Peter Haas Family Fund, which is part of the MCF. Awarded a \$50,000 capital grant to assist in remodeling Biosciences Laboratory at IVC. (1.2)
- Awarded a \$15,000 grant from The George Sandy Foundation to support new software, technology and equipment for the Student Accessibility Services program. (1.2)
- Awarded a \$170,000 grant from the Haddie Fund of the MCF to support student scholarships (\$100,000) and Community Education ESCOM courses and activities. (\$70,000). (1.2)
- MCF operating grant awards also received for COMPASS (\$50,000) and the Ethel Seiderman Institute for Excellence in Early Education (\$50,000) thanks to faculty, staff and administrators in those programs.
- Submitted proposals to Gamble and Kimball foundations for funding for the COMPASS program. (1.2)

Outreach to Alumni and Friends

- Had “Alumni Connection” table at Kentfield and IVC Open Houses and signed up alumni and friends for “eNotes” and provided 90th Anniversary buttons. (1.1)
- “Alumni Connection” celebrated new graduates at May 2016 Commencement, giving them 90th Anniversary buttons at the Alumni Connection table. (1.1)
- Volunteered at COM TedX event to reach out to alumni and friends (1.1)
- Participated on the Nursing 50th Alumni Reunion committee to locate Nursing alumni and hold an all-alumni reunion on June 10, 2017, to celebrate 50 years of the program. Silent auction at the event and invitation to contribute to Nursing Program funds will be part of the outreach. (1.1, 1.2)

Work with Advisory Committees

- In collaboration with President Coon, staffed two advisory committees that report to the Board of Trustees: Finance Advisory Committee and Program Advisory Committee to ensure that COM is following donor intent in its disbursements of COMF endowments and restricted funds. For the past year, advisory committees have been meeting and have reviewed scholarship disbursement reports and updated COMF Investment Policy Statement. (1.1, 1.2)

3. Are you on track to achieve this objective? What evidence supports your judgment of progress made toward this objective?

Yes, on track. Based on current gifts and grants in FY2016-17, less than halfway through the year and more than 50% of baseline numbers.

4. Have you achieved this objective? Yes X No If not, why not?

Rating by Educational Planning Committee

Activity:

Red= No Progress

Yellow= Progress Being Made

Green= Complete

Objective Met: Yes ____ No ____