

Educational Planning Committee
Report for Academic Year 2017-2018
Additional Objective 1: Increase Philanthropic Support
Presented by Linda Frank

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. FY 2016-17: 781 total donations, 442 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). The FY 2015-16 totals were \$555,648 (COM Advancement) and \$47,815 to the COM Foundation (unaudited figures)

*\$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 unaudited FY2016-17 totals were \$733,317 (COM Advancement) and \$1,050,819 (COM Foundation) This amount included a gift from the Estate of Jean Razenne to the COM Foundation with a value of \$941,435.

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

- Personalized thank-you cards from student scholarship recipients sent to scholarship donors. (1.1)
- Created quarterly "Advancement eNotes" emailed to donors, alumni and friends, and COM employees. (1.1)
- President's Circle- for those donors who make donations of \$1,000 or more. Direct mail to donors and prospective donors representing more than \$70,000 in contributions during 2016-17. (1.2) Special COM bookmark and thank-you letter from President Coon sent to each donor.
- To date, COM has been notified of estate plan commitments in excess of \$5.3 million. Sent planned giving and 1926 Legacy Society information to donors who wish to include COM in their estate plans. (1.1,1.2)
- #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. (1.1,1.2)
- Targeted direct mailings to alumni and friends who support Drama and Music programs.
- In collaboration with the Enrollment Services, Advancement held a reception to honor student scholarship recipients and donors. More than \$250,000 in scholarships awarded in 2016-17. (1.1)
- Collaborated with Kentfield-Greenbrae Historical Society to have a reception with more than 150 attendees for the October 2016 opening of the George Demont Otis art exhibit in the COM Fine Arts Gallery. (1.1)
- Held a special reception for major donors in October 2016 to thank them for their support of COM.(1.1)
- Hosted a special coffee with President Coon for President Circle donors after Haddie Author Talk Series (Michael Krasny) organized by ESCOM and the Library.

- Participated in fundraiser event held in San Anselmo for the Ethel Seiderman Institute for Excellence in Early Care and Education. (1.2,1.2)

Advancement Operations

- Used PayPal mobile card reader to process auction transactions at the 50th Anniversary Nursing Gala. (1.2)
- Clean up of duplicate account records in Affinaquest, and refine name and greeting fields. Affinaquest is a Salesforce platform, customer-relation donor database, to keep donor records and track donations, process thank-yous. Annual download of COM graduate contact information. (1.2)
- Use of data from wealth screening through DonorSearch to engage donors and prospective donors with a wealth capacity to give major and planned gifts. (1.2)
- In team with President Coon, continued to provide information on the COMF endowment funds regarding legal documents and correspondence to the auditors.(1.1)
- Updated Advancement web pages on COM platform, with new copy, images, and forms. (1.1, 1.2)

Outreach to Private Foundations

- Awarded a \$15,000 grant from The George Sandy Foundation to support new equipment for the Adaptive Physical Education classes. (1.2)
- In July 2016 received \$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 Kimball foundation for funding for the COMPASS program and the Center for Cooperative Media for Project Censored. (1.2)
- Received \$24,000 from Nancy P. and Richard K. Robbins Family Foundation for Summer Bridge program. (1.2)

Outreach to Alumni and Friends

- Had “COM” table at events in downtown Novato and at Whole Foods 5% Day in Novato (for IVC Organic Farm) and signed up alumni and friends for “eNotes” and provided COM enameled pins and alumni ribbons. (1.1, 1.2)
- Hosted a pre-show reception on March 17 for Drama attendees of “You’re a Good Man, Charlie Brown.”
- “Alumni Connection” celebrated new graduates at May 2017 Commencement, giving them COM enameled pins and alumni ribbons 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 held a reunion on June 10, 2017, to celebrate 50 years of the program. Tour of Nursing labs, silent auction at the event and solicitation sent to Nursing alumni to make a donation to the program. (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. In May 2017, there was a joint committee meeting with the auditor to review the COM Foundation audits. (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 FY2017-18, 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____