Ohlone College
Program Review Report

Program Description and Scope:
1. Program Review Title: Ohlone College Foundation
3. Review Type: President's Office
4. Program/Departments: Foundation (70901)
5. Authority Code: 18-Executive Director, Ohlone College Foundation
6. External Regulations: Yes X No
   Describe:
   We are subject to IRS requirements and any normal regulations of an non profit.
7. Provide a brief narrative that describes the services provided.

The Ohlone College Foundation (Foundation) is a non-profit (501c3) organization (subject to typical IRS requirements) that provides community and fundraising support for various programs of the Ohlone Community College District. The Ohlone College Foundation is governed by a volunteer board of directors (approximately 25 individuals) consisting of community leaders, faculty, administration, trustees and students. Specifically, the Foundation exists to support the college’s strategic plan, create community good-will and provide financial and fundraising support to programs and students.

The Ohlone College Foundation is also an auxiliary organization of the Ohlone Community College District and is subject to the regulations of the District as adopted for auxiliary organizations and to the Master Agreement by and between the District and the Foundation.

See Appendix A: Board Policy 3600 Auxiliary Organizations. In addition, the Foundation adheres to a specific set of Bylaws, as required for all IRS 501c3 organizations.

Primary services, programs and activities:

1. To provide the fiscal means and the management procedures that allows the District to carry on educationally-related activities not normally funded by the State. These activities include (but are not limited to):
• Student scholarships and faculty mini grants
• Endowments and trusts
• Alumni, employee giving, annual and capital fundraising campaigns
• Special events to provide financial or community (public relations) support for the College.

**Mission statement of the Foundation:**

The Ohlone College Foundation supports Ohlone College in execution of its strategic plan and provides assistance to the College and the students through fund raising and community outreach programs.

**Services provided**

The Ohlone College Foundation raises funds and solicits donations in a number of areas – including student scholarships, endowments and trusts, in-kind donations, unrestricted donations and through special events (annual golf tournament) and special programs. The Foundation receives the bulk of its financial support from individual community members, local businesses, and private funding groups and foundations.

8. *Describe how the program specifically serves students, faculty, staff, or other.*

Fundamentally, the Foundation serves these audiences by aligning organizational goals and objectives directly to the strategic goals of the college and the specific goals of the president. In addition, the Foundation serves Ohlone students through scholarship programs. Students can apply for Foundation scholarships annually. The average scholarship awarded is $500 - covering the costs of tuition for one semester. In Fall 2012, approximately 73 students were awarded scholarships - totaling more than $65,000.

In addition, the Foundation also sponsors a College-wide $30,000 mini-grant program for faculty that's designed specifically to fund priority projects from program improvement objectives. The Foundation also funds an employee giving campaign that provides employees/faculty/staff the ability to directly donate to a project of their choice.
9. Describe how the program or service needs are addressed (how the program/service accomplishes what it's supposed to do.) How are current technologies applied?

In January 2013, the Foundation board of directors approved a strategic plan that matches foundation goals to college objectives. This Plan can be found in Appendix A.

The Foundation's strategic plan directly addresses the following College Strategic Goals:

CG1.1; 1.8; 1.9
CG 4.3; 4.7
CG 5.3
CG 8.3

The Foundation develops specific strategies and then action plans/projects to meet these strategic goals of the college. Currently, the Foundation conducts two major events, an annual golf tournament and a benefit luncheon honoring local community members. However, as identified in the strategic plan/attachment, the Foundation engages directly in fundraising for scholarships, endowments and major gifts as well as specific program gifts for the college. Additional revenue is generated as interest from the unrestricted general fund and endowments.

In addition the Foundation coordinates an employee giving program that provides opportunities for Ohlone employees to contribute to various endowments of their choosing.

10. Discuss the impact of the program on the college and/or other programs. Highlight any services, reports or functions supplied, in whole or in part, by this service area that supports state or federal compliance mandates for the College.

Current Foundation accounts include two general funds and two restricted funds. One of the general fund are monies (in-kind and direct) provided by the college/district. The second general fund is Foundation specific. Investment reports for all endowments can be found in Appendix B.

11. Discuss the impact of the program on the community and the impact of the community on the program.

The college foundation serves as a bridge between the college,
local business, non-profit organizations and community members at large. The foundation board provides an opportunity for civic-minded citizens with interest in higher education to participate in supporting the college in a number of meaningful ways. In addition to board member involvement, the Foundation offers alliance through an auxiliary/ambassador type membership as well as corporate membership levels ranging from $2500 to $15,000.

**College Mission**

1. **Mission Statement**
   The mission of Ohlone College is to serve the community by offering instruction for basic skills, career entry, university transfer, economic development, and personal enrichment for all who can benefit from our instruction in an environment where student learning success is highly valued, supported and continually assessed.

2. **Vision Statement**
   Ohlone College will be known throughout California for our inclusiveness, innovation and superior rates of student success.

3. **Core Values, Goals & Objectives:**
   **College Core Values**
   - We provide life-long learning opportunities for students, college personnel and the community.
   - We open access to higher education and actively reach out to under-served populations.
   - We promote diversity and inclusiveness.
   - We maintain high standards in our constant pursuit of excellence.
   - We value trust, respect and integrity.
   - We promote team work and open communication.
   - We practice innovation and actively encourage risk-taking and entrepreneurship.
   - We demonstrate stewardship for our human, financial, physical and environmental resources.

   **College Goals/Objectives**
   1. **Through innovative programs and services, improve student learning and achievement.**
      1. By 2013, have in place an ongoing system for identifying and assessing student learning outcomes at the program and course levels, which includes faculty dialogue and appropriate improvement plans.
   4. **Use human, fiscal, technological, and physical resources responsibly, effectively, and efficiently to maximize student**
4. Briefly describe how the program supports the college mission, vision selected college values.

The Foundation provides a link between the College and the community the College serves. Through various funding mechanisms the Foundation provides fiscal assistance to the College’s teaching and learning environments, academic programs, and directly to students in the form of scholarships. In doing so the Foundation supports the College’s mission specifically in support of student learning and success. Similar to the College values, the Foundation’s board promotes diversity, inclusiveness, and openness to differing viewpoints. Trust, respect and integrity are also part of the boards guiding principles. The Foundation promotes teamwork and open communication and demonstrates stewardship of human, financial, physical, and environmental resources. See appendix A for specifics.

5. Briefly describe how the program supports selected college goals.

see answer to previous question

6. Briefly describe how the program supports selected college objectives.

see answer to previous question
• Student Learning Impacts
  1. Student Learning Impact -

    The Foundation offers annual student scholarships - directly
designed to help students afford the cost of tuition and to
ensure that they are able to focus on their education.

    The Foundation also supports college programs through
funding for program improvements, as identified annually
through the program review process.

    a. Enter assessment results for "Student Learning Impacts" and
       analyze student success.

    b. Future Action

• Program Achievement
  1. List area-specific outcomes.

    New executive director of Foundation hired in March 2012.

    2. Identify internal and/or external benchmarks and regulations.

    Razor's Edge (best practice external data base and fundraising tool)
    was fully implemented.

    The Foundation maintained it recognition as a financially stable
IRS 501c3 organization with more than $4 million in assets.
Audtior reports indicated best accounting practices are in place.

    3. Enter assessment results for area-specific outcomes and analyze
trends.

    4. Analyze program budget trends and expenditures. Comment on
how the program can best use budget resources.

    Foundation will move towards self-sufficiency in coming years.
    Focus will change from scholarships to unrestricted donatinos.

    5. Analyze the program's current use of staff, equipment, technology,
facilities, and/or other resources. Comment on how the program
    can best use these resources.

    6. Describe any additional notable program achievements(optional).

7. Additional Program Table Data

    program Achievement Chart
8. Future Action
   Current levels of achievement indicators maintained.

- **Program Analysis**
  After assessing student learning outcomes/impacts, student/program achievement, and the status of previous program improvement objectives (PIOs), analyze the data and any identified trends, and summarize your findings. Use these data and trends to prioritize, revise, or develop new PIOs.

  1. Describe program achievements and successes.

     New director hired in April 2012. Since that time, bylaws and master agreement have been rewritten and implemented. Two major events (COY and Golf tournament) were held with success. The latter raised $32K (more than last year) with less golfers and $30K in savings/event costs. In addition, the mailing list has been modified to ensure correct addresses and donors, and new systems have been put into place for board members, giving levels and corporate involvement.

  2. According to the evidence, what are the areas needing improvement?

     See new program goals/objectives in Appendix A

- **Program Improvement Objectives:**

  1. Objective:

     Strengthen organizational and administrative procedures for the Foundation office setting the stage for a financially stable and effective non profit.

     a. Action Plan

        Year 1:

        Develop and implement new mission/vision/bylaws/masteragreement, website and strategic plan.

        Review and implement best practices of other CCCF's.
Fully incorporate all Razor's Edge technology

Ensure full staffing and all training is provided

Review all current Foundation programs (golf, COY, bricks, employee giving, faculty mini grants) for effectiveness and enhancements. Refine as necessary.

Develop new giving programs (alumni, annual campaign)

b. Which college goal(s) does this program improvement objective work to achieve? Clearly describe how your PIO will help achieve one or more of the college goals and objectives, has impact beyond the particular department, and contributes to student learning/success.

1. Through innovative programs and services, improve student learning and achievement.
Rationale:
See strategic plan (appendix A) for specifics

3. Promote continuous, needs-based, learning and professional development opportunities for all district personnel.
Rationale:
See strategic plan (appendix A) for specifics

5. Lead and educate the community in environmental sustainability.
Rationale:
See strategic plan (appendix A for specifics)
8. Engage all members of the college community in active, continual institutional improvement.
Rationale:
See strategic plan (appendix A for specifics)

2. PIO Assessment
   a. Enter assessment results with analysis.

   2011/12 was a transition year for the foundation. A new executive director was hired in March 2012. In addition, the following was accomplished organizationally/administratively:

   1. Cleanup of mailing list resulting in the immediate elimination of 800 incorrect addresses or deceased individuals. 2. Indepth clean up of all records and the physical facility of the foundation.

   b. Describe how PIO achieved one or more of the college goals and objectives, had an impact beyond the particular department, and contributed to student success/learning.

   The Foundation awarded approximately $80K in HOSTS (Helping One Student to Succeed) scholarships in June 2012. The annual Citizen of the Year event netted $22K to the general foundation fund.

   c. Analyze the impact of reallocation or addition of resources. If money or resource was not used, give rationale.

   Additional administrative procedures and best practices are needed. However, due to the vacancy of the executive director position and decreased administrative staffing at the end of FY2012 this was not possible. Once full staffing is achieved greater growth can be made on this goal.

   d. Future Action

   Strategies to promote improvements. Specify.

   Hire full time administrative assistant for the Foundation, effective February 2013.

   • Outside Review Results
1. List each team members name and title.
   None.
2. Discuss key feedback provided by team and how it was incorporated into the report.
   None.

- **Attached Files**
  1. [Ohlone College Investment Review 10-31-20121.pdf](#)
  2. [Foundation Strategic Plan Nov 28.pdf](#)