



## 1.0 SUPPORT OF COLLEGE MISSION

The TBCC Foundation is a nonprofit organization committed to helping students gain a college education by awarding scholarships and building the capacity of Tillamook Bay Community College to provide vital educational opportunities for our community. We support educational programs at TBCC, and ensure the college has the resources it needs to stay current. Our purpose is to engage the community and increase the level of philanthropic support for student scholarships and the growth, innovation and overall fiscal strength of TBCC.

## 2.0 ACCOMPLISHMENTS IN ACHIEVING GOALS

Service Area Outcome	Assessment Tool, Criteria for Measurement	Analysis/ Progress	Refinements/ Modifications
The Foundation will grow and enhance their service to the college which helps TBCC students be successful.	Amount of contributions or donations made to the TBCC Foundation in an academic year.  Thresholds • Green: > \$100K • Yellow: \$85-99K • Red: <\$85K	\$116,050.50 in scholarship support \$9,000 Student Emergency Funds \$1,000 TEYA \$15,000 grants \$3,592 in gift fees \$30,000 in pledge receipts for capital \$1,200 program funds \$15,603 undesignated funds \$4,523 for C2C \$25,000 C2C Healthcare scholarship 100k planned gift	The TBCC Foundation board has committed to increasing total funds raised to benefit scholarships by 10 percent the following fiscal year, in addition to \$25k annual contribution to C2C scholarships.

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<p>TBCC students receive needed financial resources to continue their education.</p>	<p>2018-2020 Assessment:  Green 20%  Yellow 10-19% increase.  Red 10% increase.</p> <p>Beginning 2022-2023 Assessment changed to reflect below metrics. Increase the number of students applying for scholarships.  Thresholds  · Green: 8-10% or greater increase  · Yellow: 5-7% increase  · Red: &lt;4% increase</p>	<p>We saw a decrease in number of applicants 58 total, target was 59-69. COVID-19 implications are still affecting scholarship participation. Alter metric to coincide with number of students logging into AwardSpring each application cycle, rather than focusing on increase from previous year.</p> <p>Begin tracking a metric of 'Convert 75 percent of AwardSpring applicants to completed applications. Beginning 2022-2023 Green, Yellow and Red thresholds changed to better reflect TBCC student population.  Green 8-10% increase  Yellow 5-7% increase  Red 4% or less increase.</p>	<p>Evaluate if this is an appropriate measure for this SAO. Also, consider if the spring scholarship cycle deadline should be extended. Has this been a barrier to students - this would allow for longer application period, but they wouldn't be able to participate in the student award ceremony.</p>
<p>TBCC Students receive needed financial resources to continue their education.</p>	<p>Increase the number of scholarship opportunities.  Thresholds  · Green: 3 or more new scholarships  · Yellow: 1 or 2 new scholarships  · Red: No new scholarships</p>	<p>This measurement will be retired - we continued to increase scholarship support available to students. Adding scholarships is not a driver increasing the amount available is the driver.  2018/19 = \$102,698; 2019/20 \$ 78,209;  2020/21 = \$107,803</p>	<p>None. Measure will be retired.</p>

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Project	Description	Progress
Launch the Alumni Association	<ol style="list-style-type: none"> <li>1. Work with the TBCC registrar to develop an initial mailing list for TBCC graduates and invite graduates to the Association.</li> <li>2. Implement a communication and engagement plan to increase membership.</li> <li>3. Develop a web presence for the Alumni Association with opt in opportunities.</li> <li>4. Evaluate first year efforts.</li> </ol>	<p>Done. AA launched, invitations to join sent to 2018-2021 TBCC graduates. Two hard copy letters sent, welcoming to AA, inviting to join TBCC for MLK day of service, free stickers, and exclusive discount code for flash sale merchandise. Email communications sent via CC; three two regarding Mildred Davy festivities, recap and one regarding BAC fundraiser;. Digital opt in form on website. No in person events held, COVID.</p>
Transition the Foundation Accounting System away from the Business Office	<p>Work with the Business Office to transition the Foundation to a new local accountant and new accounting system.</p> <ul style="list-style-type: none"> <li>• Identify Accounting Needs</li> <li>• Interview and Hire an Accountant</li> <li>• Determine and purchase an accounting system</li> <li>• Transition funds from Jenzabar to a new system</li> <li>• Write procedures to manage cash handling and to meet fiduciary best practices</li> </ul>	<p>Done. Accounting system was transitioned. Jigsaw Consulting Services hired to set up QB, and monthly service fee of \$250 arranged. Undesignated budget reflects contracted service increase. Need to finalize/tweak existing cash handling procedures, approval at fall 2022 board meeting. Currently Britta has access to QB, check writing capabilities, and listed on bank account, so permissions need to be adjusted to make board feel comfortable, as well as protect employee.</p>
Implement a new Customer Relationship Management System (CRM)	<ul style="list-style-type: none"> <li>• Determine the scope of needs for a new CRM</li> <li>• Research what other Foundations are using</li> <li>• Demo vendors</li> <li>• Implement the new system</li> </ul>	<p>Donor Perfect new CRM. Raw data transferred from Jenzabar – 80 percent complete. Pledges were transferred as gifts, so dates go into future. DonorPerfect programming team/managers have been in contact, and they are working to resolve issues.</p>
Transition the Foundation bank account to a local bank	<p>As directed by the Foundation Finance Committee research the region bank options in Tillamook County and recommend a new bank.</p> <ul style="list-style-type: none"> <li>• Work with the Business Office to assist with the transfer of funds.</li> <li>• Establish new processes for bank deposits separate from the Business Office</li> </ul>	<p>Done. TLC, a Division of Fibre Federal Credit Union has been a great community partner, as well as more favorable account rates/less fees than US Bank. A new checking account is established and all funds have been removed from US Bank.</p>

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### 3.0 PERSONNEL SUMMARY

a. Staff 1.75 FTE Executive Director, Development Specialist

b. Britta Lawrence, Executive Director 1.0 FTE

The Executive Director of the TBCC Foundation is responsible for providing vision, leadership, strategic direction and administrative oversight for the comprehensive resource development efforts of the Foundation. The Executive Director reports to the Vice President of Administration and College Relations.

The Executive Director ensures compliance with all governmental policies and regulations of the Foundation, supervises foundation staff, manages daily operations of the foundation office, and is responsible for achieving all fundraising goals.

c. Vanessa Steele, Development Specialist 0.75 FTE (This position is funded by a combination of the Title III Grant and the General Fund)

Under the guidance of the Executive Director, the Development Specialist is responsible for supporting the administration of resource development and fundraising efforts for Tillamook Bay Community College's healthcare pathways and the Foundation. The development specialist assists the Foundation with the development and implementation of special events, fundraisers and other projects by handling logistics like event set-up, developing and maintaining guest lists, registration and training volunteers, and providing other support relating to the nursing program as needed.

The Development Specialist will develop community relationships that support the Healthcare Learning Communities and the new college Nursing program. Use of Customer Relationship Management (CRM) software (DonorPerfect), providing technical support, data entry, and summary reports to Foundation staff. Work with Foundation Executive Director to plan donor and alumni events, visits, and email campaigns. Other major areas of responsibilities include: Develop modules, reports, and customize dashboards on DonorPerfect, Provide technical support to Foundation office in analysis of constituent data, Foster best practices in use of data management, Track agreements, funding sources and financial data and provide general support for scholarships, nursing, and healthcare programs, career center and other initiatives supported by Title III.

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### 4.0 STAFF DEVELOPMENT

Professional Development Britta Lawrence, Executive Director

<p><b>Professional Development Objective 1:</b> Conference for Community College Advancement - CASE</p> <p>Development Activities: <b>The Five “C’s” of Fundraising, Connections, Collaboration, Communication, Creativity, and Community</b></p> <p>Measurements: Complete one training</p> <p>Time Frame for Completion: <b>October 26-28 2022, Anaheim, CA – Title III funded</b></p>
<p><b>Professional Development Objective 2:</b> AGN 103: Planning Activities</p> <p>Development Activities: Planning an integrated calendar of appeals, communications and other activities is an essential aspect of a good annual giving strategy. Multi-channel plans are often complex, layered, and filled with details, but they serve as important guides and roadmaps for your program. When built and shared correctly, they help mobilize stakeholders, optimize resources, and ensure that your efforts are executed in a timely and efficient manner.</p> <p>Measurements: Complete training</p> <p>Time Frame for Completion: Webinar, readily available, FY end 2023</p>
<p><b>Professional Development Objective 3:</b> Rotary President Elect Training</p> <p>Development Activities: Required training hosted by Rotary International and District 5100 to onboard as incoming president. Leadership, facilitation, fundraising, grant writing all required training areas.</p> <p>Measurements: Complete training</p> <p>Time Frame for Completion: FY end 2023</p>

Professional Development Vanessa Steele, Development Specialist

<p><b>Professional Development Objective 1:</b> AGN 103: Planning Activities</p> <p>Development Activities: Planning an integrated calendar of appeals, communications and other activities is an essential aspect of a good annual giving strategy. Multi-channel plans are often complex, layered, and filled with details, but they serve as important guides and roadmaps for your program. When built and shared correctly, they help mobilize stakeholders, optimize resources, and ensure that your efforts are executed in a timely and efficient manner.</p> <p>Measurements: Complete one training</p> <p>Time Frame for Completion: Webinar, readily available, FY end 2023</p>
<p><b>Professional Development Objective 2:</b> AGN 102: Segmenting Prospects</p> <p>Development Activities: Segmenting your audience is the first step in developing a successful annual giving strategy. This begins by recognizing the different behaviors, characteristics, and interests of your prospects, organizing them into groups, and developing messages that are personal and meaningful. Doing this in a</p>

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thorough and thoughtful way will help ensure that all of your appeals and communications are optimized and integrated across each and every channel.

Measurements: Complete one training

Time Frame for Completion: Webinar, readily available, FY end 2023

**Professional Development Objective 3:** DonorPerfect customized trainings

Development Activities: Preparing custom reports, analyze constituent data etc.

Measurements: Watch all available DonorPerfect knowledgebase videos, as well as complete individualized trainings with DP trainers.

Time Frame for Completion: FY end 2023

### 5.0 FACILITIES AND EQUIPMENT

In 2022 the TBCC Foundation moved office locations from the TBCC main campus at 4301 Third Street to the Partners for Rural Innovation Building located at 4506 Third Street. This move was necessary for two reasons, the college has grown tremendously, which means more staff were/are needed, additionally it allowed the Development Specialist to have their own office space. Having the foundation housed at PRI has strengthened partnerships with the other organizations housed at PRI: Economic Development Corporation (EDC), Small Business Development Center (SBDC), OSU Extension, Juntos Afuera and Tillamook County 4-H.

To build competency and improve financial processes, the TBCC Foundation purchased a Square credit card reader. This allows foundation staff to process donations, board lunches, event entry fees and merchandise sales on their own without the assistance of the TBCC Business Office. Previously the process had many bottlenecks, leading to delays in donor donation receipts, and the creation of additional credit card processing batches to separate TBCC Foundation and college transactions.

### 6.0 BUDGET

The TBCC Foundation budget has two components that are tracked and managed differently. The College Development budget is housed under the college general fund, and managed by the foundation Executive Director and the Foundation Undesignated Budget – which is approved annually by the TBCC Foundation Board, again managed by the foundation Executive Director with a separate bookkeeping service. An updated Memorandum of Understanding (MOU) was signed in December of 2021 by the TBCC Foundation and President of TBCC – this explains in greater detail the arrangement between the college and foundation. The Title III federal grant Tillamook Bay Community College received expanded the capacity for the foundation to hire a Development Specialist. The grant was written and approved to hire a D.S., which means College Development will to start budgeting funds to cover a percentage of the Development Specialist position in years three-five. After

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year five, the plan is to retain the position, and have it be fully funded by the TBCC general fund.

The role of the Development Specialist is to identify funding sources that could help bring up the new nursing program, and continue to strengthen/expand our healthcare pathways programs. This support is crucial to ensure we meet all appropriate metrics laid out in the Title III grant, and allocated funds from the bond that was passed in Tillamook County in May 2022 to build a healthcare pathways building, and start a nursing program.

The TBCC Foundation will continue to help identify funding sources for equipment or capital as the College President or other departments approach them on campus.

### **7.0 STRENGTHS AND WEAKNESSES**

#### a. Strengths

- Title III provided funding to purchase a Customer Relation Management (CRM) software. This new tool will allow TBCC Foundation staff to pull the necessary donor reports without spreadsheet manipulation, and using 'workarounds' previously necessary with the Jenzabar Advancement module.
- Tillamook County passed the bond in May – demonstrating there is a large percentage of community support and momentum that can be capitalized on as we begin fundraising to support our new nursing program as well as our other healthcare pathways.
- Internal staff promotion from Development Director to Executive Director is a benefit to knowing the details and what caveats are included in each role.

#### b. Weaknesses

- The largest weakness the foundation faced was not being able to hire a development specialist for the first six months the Title III grant funds were available. Year 1 is where metrics are developed for the five-year reporting period – ex. Establish increased capacity and ROI the foundation has with new software and staff in place.

#### c. Opportunities

- More collaboration with the student services staff made during scholarship cycles. Being present at student orientation sessions, and financial aid workshops helped to get the idea of foundation scholarships in front of students more frequently.
- The TBCC Foundation scholarship cycle was selected as one category for the Student Services LEAN audit. The SS team did this work, and their suggestions were shared with the foundation executive director. Valuable for other areas of TBCC to familiarize themselves with the foundation, as well as offering support in time of staffing challenges.

#### d. Challenges

- The COVID-19 Pandemic affected the TBCC Foundation's ability to host in person events/fundraisers. This affected the launching of the Alumni Association and networking gatherings that we intended to host.

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- The TBCC Foundation Board had two long time board members resign after the Development Director was reassigned to the Executive Director of the Foundation. This placed more weight on the remaining board members shoulders, causing some stress in committee work due to dwindling participation.
- Like nearly all higher education foundations across the state, the TBCC Foundation faced staffing challenges when advertising for the Development Specialist position. TBCC was awarded a Title III grant, which provided a funding source for multiple positions, but the Development Specialist role was vacant for six months prior to being filled. We now have an excellent staff person in that role that has nonprofit and medical field experience, but no previous employment experience with higher education.

### 7.5 PAST YEAR GOAL LOOK BACK

Project	Description	Year	Progress
Develop a Fundraising and Communication plan for 2020	<p>Develop an integrated communication and fundraising plan that increases the donor base, retains current donors, and increases resources available to the college by providing community engagement opportunities, fundraising options, and meaningful stewardship of donors.</p> <ol style="list-style-type: none"> <li>1. The TBCC Foundation Board will finalize a Fundraising and Engagement Plan for calendar year 2020 at the Dec. board meeting that integrates all foundation engagement, stewardship, and fundraising goals.</li> </ol>	2019	A communication and stewardship plan was created and launched 12/2019. A Director of Development was hired in 2020 to complete the work.
Research developing an Alumni Association	<p>Investigate options for developing an Alumni Association at TBCC.</p> <ol style="list-style-type: none"> <li>1. Consider goals for the program.</li> <li>2. Consider database needs.</li> <li>3. Ask Blue Mountain to share their research.</li> <li>4. Seek input from Alumni regarding what they would like in an Alumni Association.</li> </ol>	2020	This will be completed by the new Development Director and will roll as a project into 2020-21.
Increase Community Engagement /civic opportunities at the college	The Advancement team will work with the equity and inclusion committee and other partners throughout the college to implement three community engagement/civic events sponsored by the college.	2020	The Spring Art show was cancelled due to COVID-19. The Poet Laureate was cancelled due to COVID-19. Outreach for the food pantry was



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	<ol style="list-style-type: none"> <li>1. Recognition of a national “month” that includes a community partner and onsite event (Black History Month, Women’s History Month, etc.)</li> <li>2. Collaborate with the Art instructor to hold a student Art Showcase and fundraising reception in March 2020</li> <li>3. Fundraiser for the TBCC Student Food Pantry</li> </ol>		<p>made to Foundation donors and donations were received but needs more coordination with the equity team.</p> <p>Management of this project will be with the new Development Director and this project will roll into next year’s project plan. The intent is for the DD to serve as a point person for activities and assist with logistics and any public relations.</p>
Develop an Alumni Association	<p>Develop an Alumni Association at TBCC.</p> <ol style="list-style-type: none"> <li>1. Consider goals for the program</li> <li>2. Consider database needs</li> <li>3. Ask OCCF to share their research</li> <li>4. Seek input from Alumni regarding what they would like in an Alumni Association</li> <li>5. Write and launch an approved plan for 2022</li> </ol>	2021	Work is underway. Met with OSU Alumni leaders. Reviewed BMCC research as well as their alumni program launch.
Reconstruct the AAUW/TBCC Reflection Garden and celebrate completion of the 10-year project.	<ol style="list-style-type: none"> <li>1. Redo the memorial bricks</li> <li>2. Update the kiosk</li> <li>3. Through a celebration event in conjunction with AAUW</li> </ol> <p>Create media around the project and relationship with AAUW</p>	2021	This project is on track to be completed in Spring of 2021. A celebration will be held to recognize the AAUW partnership and success. 10-year tree project.
Launch the Alumni Association	<ol style="list-style-type: none"> <li>1. Work with the TBCC registrar to develop an initial mailing list for TBCC graduates and invite graduates to the Association.</li> <li>2. Implement a communication and engagement plan to increase membership.</li> <li>3. Develop a web presence for the Alumni Association with opt in opportunities.</li> </ol> <p>Evaluate first year efforts.</p>	2021	AA launched, invitations to join sent to 2018-2021 TBCC graduates. Two hard copy letters sent, welcoming to AA, inviting to join TBCC for MLK day of service, free stickers, and exclusive discount code for flash sale merchandise. Email communications sent via CC; three two regarding Mildred Davy festivities, recap and one regarding BAC fundraiser. Digital opt in form on website.

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			No in person events held, COVID.
Transition the Foundation Accounting System away from the Business Office	<p>Work with the Business Office to transition the Foundation to a new local accountant and new accounting system.</p> <ul style="list-style-type: none"> <li>• Identify Accounting Needs</li> <li>• Interview and Hire an Accountant</li> <li>• Determine and purchase an accounting system</li> <li>• Transition funds from Jenzabar to a new system</li> <li>• Write procedures to manage cash handling and to meet fiduciary best practices</li> </ul>	2021	<p>Done. Accounting system was transitioned.</p> <p>Jigsaw Consulting Services hired to set up QB, and monthly service fee of \$250 arranged. Undesignated budget reflects contracted service increase.</p> <p>Need to finalize/tweak existing cash handling procedures, approval at fall 2022 board meeting. Currently Britta has access to QB, check writing capabilities, and listed on bank account, so permissions need to be adjusted to make board feel comfortable, as well as protect employee.</p>
Implement a new Customer Relationship Management System (CRM)	<ul style="list-style-type: none"> <li>• Determine the scope of needs for a new CRM</li> <li>• Research what other Foundations are using</li> <li>• Demo vendors</li> <li>• Implement the new system</li> </ul>	2021	<p>Donor Perfect new CRM. Raw data transferred from Jenzabar – 80 percent complete. Pledges were transferred as gifts, so dates go into future. DonorPerfect programming team/managers have been in contact, and they are working to resolve issues.</p>
Transition the Foundation bank account to a local bank	<p>As directed by the Foundation Finance Committee research the region bank options in Tillamook County and recommend a new bank.</p> <ul style="list-style-type: none"> <li>• Work with the Business Office to assist with the transfer of funds.</li> </ul> <p>Establish new processes for bank deposits separate from the Business Office</p>	2022	<p>Done. TLC, a Division of Fibre Federal Credit Union has been a great community partner, as well as more favorable account rates/less fees than US Bank. A new checking account is established and all funds have been removed from US Bank.</p>

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### 8.0 NEW GOALS AND PLAN

After completing the S.W.O.C. analysis, established TBCC Foundation operational project list and SAO's were examined to ensure strengths and opportunities are leveraged, and challenges and weaknesses are analyzed and improved upon. This analysis discontinued some existing priorities that don't reflect the work or success of the TBCC Foundation – creating a specific number of new scholarships each year, total dollars received rather than funds dedicated to scholarship contributions only.

Project	Description	Progress
Engage and Utilize Alumni Association members as donors	<ul style="list-style-type: none"> <li>• Turn 10 percent of association members to donors a year.</li> <li>• Develop 'outstanding alumni award'. Expand opt in form to include alumni nominations, publish in winter newsletter.</li> </ul>	All AA directory included in foundation newsletter mailing, as well as invited to MD luncheon.
Engage/Develop Foundation Board	Utilize Title III funds to do some board development. Find the fire and passion that existing members have, as well as onboarding new board members <ul style="list-style-type: none"> <li>• Add two board members to roster</li> <li>• Encourage/enforce all board members as donors as mentioned in board policies</li> <li>• Work with governance committee to audit existing board policies. What is working – what is not? Should we implement a code of conduct?</li> <li>• Non Profit Board Professional Development</li> </ul>	Two board members added in September. Committee assignments sent to existing and new board members. Meeting with Ann Batchelder, employed at Adventist Health to hopefully welcome a healthcare expert to the foundation board.
Implement a new Customer Relationship Management System (CRM)	<ul style="list-style-type: none"> <li>• Project not 100 percent complete – carry over from 21-22.</li> <li>• Work with DonorPerfect programmers to fix pledge information from conversion</li> </ul>	DonorPerfect programming team/managers have been in contact, and they are working to resolve issues.
Onboard Development Specialist – Title III funded, explore CWE student	<ul style="list-style-type: none"> <li>• Establish job description with HR and Title III director</li> <li>• Determine best places to advertise and attract potential employee</li> <li>• Develop onboarding schedule/plan when employee is hired</li> <li>• Determine if CWE student could be hired – to ensure no supplanting is done with Title III funded DS position.</li> </ul>	DS hired onboarding underway. Intern sourced through Tillamook Works program scheduled to begin as Foundation intern winter term.