

# Cabrillo College

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## Foundation

### Officers

#### President

Stephen Snodgrass

#### Vice President

Leola Lapidés

#### Secretary

William Ow

#### Chief Financial Officer

Alan Aman

#### Past President

Linda Burroughs

#### Community Representatives

Pegi Ard

Claire Biancalana

Carrie Birkhofer

Jess Brown

Owen Brown

Ceil Cirillo

Linda Downing

Lee Duffus

David Heald

Kelly Nesheim

June Padilla Ponce

Carlos Palacios

Patty Quillin

Maria Esther Rodriguez

Gun Ruder

#### College Trustee Representatives

Rachael Spencer

Gary Reece

#### College Staff Representatives

Laurel Jones

President

Victoria Lewis

VP Administrative Services

Kathleen Welch

VP Instruction

Carsbia Anderson

VP Student Services

Enrique Buelna

Faculty Representative

#### Executive Director

Eileen Hill

## MEMORANDUM

**DATE:** May 2, 2017

**TO:** Alan Aman, Carsbia Anderson, Jr., Pegi Ard, Claire Biancalana, Carrie Birkhofer, Jess Brown, Owen Brown, Enrique Buelna, Linda Burroughs, Ceil Cirillo, Linda Downing, Lee Duffus, David Heald, Laurel Jones, Leola Lapidés, Victoria Lewis, Kelly Nesheim, William Ow, Carlos Palacios, June Padilla Ponce, Patty Quillin, Gary Reece, Maria Esther Rodriguez, Gun Ruder, Rachael Spencer, Kathleen Welch

**FROM:** Steve Snodgrass, Cabrillo College Foundation President

**GUESTS:** Brian Sharpes, UBS Financial Services  
Chuck Mornard, Construction and Energy Management Chair  
Isabel O'Connor, Dean of Human Arts and Social Sciences  
Marcy Alancraig, English Instructor  
Rachel Mayo, Dean of Education Centers

**SUBJECT: Cabrillo College Foundation Board of Directors Regular Meeting  
Tuesday, May 9, 2017**

**11:00 am – 12:00 pm Tour of Watsonville Center**

**12:00 - 2:00 pm Board Meeting**

**Cabrillo College Watsonville Center**

**318 Union Street, Watsonville**

**(Solari Green Technology Center, RM C108)**

## AGENDA

	Responsibility	Page
<b>A. Regular Open Session</b>		
1. Welcome and Call to Order	S. Snodgrass	
2. Approval of Agenda	S. Snodgrass	
<i>We reserve the right to change the order in which agenda items are discussed and/or acted upon at this meeting. Subject to further action, the agenda for this meeting is to be approved as presented. Items may be added to this agenda for discussion or action only as permitted by the</i>		

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[www.cabrillo.edu/associations/foundation](http://www.cabrillo.edu/associations/foundation)

*Please remember Cabrillo College Foundation in your will*

*Brown Act.*

Item	Responsibility	Page
<b>A. Regular Open Session (cont.)</b>		
3. February 14, 2017 meeting minutes	S. Snodgrass	7-11
<b>B. Public Comment</b>		
1. Public Comment Opportunity	S. Snodgrass	
<b>C. Special Presentations</b>		
1. Cabrillo Watsonville Center	K. Welch	
1.1 Rachel Mayo, Dean of Education Centers		
1.2 Chuck Mornard, Construction and Energy Management Chair		
2. Guided Pathways	L. Jones	
2.1 Isabel O'Connor, Dean of Human Arts and Social Sciences		
2.2 Marcy Alancraig, English Instructor		
<b>D. Reports</b>		
1. College President Report	L. Jones	12-13
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July 1, 2016 to April 25, 2017		
Outright Gifts:	\$2,233,665	
Unbooked Revocable Planned Gifts:	\$ 800,000	
Total:	\$3,033,665	
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4. Review Nominating Committee Recommendations	L. Lapidès	37-39
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5. Form 990	A. Aman	40
<b>F. Informational Items</b>		
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1.1 Historical Gifts Chart as of February 28, 2017		
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2.1 CCF UBS Performance Report		attached to email
2.2 Traditional Pool Summary Activity Report as of March 31, 2017		42
2.3 ESG Pool Summary Activity Report as of March 31, 2017		43
3. 2016-17 President's Circle Campaign	C. Biancalana	44-48
4. Cabrillo Advancement Program (CAP)	C. Birkhofer	49
5. WES Campaign	L. Lapidès	50

6. Scholarships	R. Spencer	51
7. Honoring Retiring Board Members <ul style="list-style-type: none"><li>• Pegi Ard</li><li>• Jess Brown</li></ul>	S. Snodgrass	
8. Presentation to Steve Snodgrass	E. Hill	
9. Calendar and Roster	S. Snoggrass	52-54

#### **G. Adjournment**

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1. Adjournment	S. Snodgrass
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### **2017-18 BOARD MEETINGS**

*Tuesdays, 12:00 PM – 2:00 PM - Sesnon House unless otherwise noted*

**September 12, 2017**

**November 14, 2017**

**February 13, 2018**

**May 8, 2018**

### **BOARD OF DIRECTORS ATTENDANCE CHART**

<b>Board of Directors</b>	<b>2/9/16</b>	<b>5/10/16</b>	<b>9/13/16</b>	<b>11/1/16</b>	<b>2/14/17</b>
Alan Aman	P	A	P	P	P
Pegi Ard	P	A	A	P	P
Claire Biancalana	P	P	A	P	P
Carrie Birkhofer	P	P	P	P	A
Jess Brown	P	P	P	A	P
Owen Brown	P	P	P	P	P
Enrique Buelna	P	P	P	A	P
Linda Burroughs	P	P	A	P	P
Ceil Cirillo	P	P	A	P	A
Linda Downing	P	A	P	P	P
Lee Duffus	P	P	A	A	P
David Heald	P	P	A	A	P
Laurel Jones	P	P	P	P	P
Leola Lapidés	P	P	P	A	P
Victoria Lewis	A	P	P	A	P
Kelly Nesheim	P	P	P	P	P
William Ow	P	P	P	A	P
Carlos Palacios	A	A	A	A	P
June Padilla Ponce	A	P	P	P	A
Patty Quillin	N/A	N/A	A	P	P
Gary Reece	A	A	P	P	P
Maria Esther Rodriguez	N/A	N/A	P	P	P
Gun Ruder	N/A	N/A	P	P	P
Steve Snodgrass	P	P	P	P	P
Rachael Spencer	A	P	A	P	A
Kathleen Welch	P	P	P	P	P

*P=Present, A=Absent, N/A=Not applicable, not on the Board at the time. Based on Board of Director's meeting minutes.  
Please contact Cabrillo College Foundation if you believe this chart is in error.*

## UPCOMING EVENTS

**American Dream Scholarship Ceremony**  
Thursday, June 1, 2017  
4:00 pm  
Samper Recital Hall

## EXCLUSIVE EVENTS FOR PRESIDENT'S CIRCLE MEMBERS

Cabrillo Culinary Arts Winemaker's Dinner  
(*\$2,500+ members*)

May 11, 2017  
6:00 – 9:00 pm

Crawfish Boil at the home of Andrew & Marilyn Calciano  
(*\$1,500+ members*)

June 22, 2017  
5:30 – 8:30 pm

Cabrillo Stage Play and Reception  
(*\$1,500+ members*)

July 21, 2017  
5:30 pm

CABRILLO COLLEGE FOUNDATION  
BOARD OF DIRECTORS MEETING  
Minutes of February 14, 2017

Directors Present: Alan Aman, Pegi Ard, Claire Biancalana, Jess Brown, Owen Brown, Enrique Buelna, Linda Burroughs, Linda Downing, Lee Duffus, David Heald, Laurel Jones, Leola Lapidés, Victoria Lewis, Kelly Nesheim, William Ow, Carlos Palacios, Patty Quillin, Gary Reece, Maria Esther Rodriguez, Gun Ruder, Stephen Snodgrass and Kathleen Welch

Directors Absent: Carsbia Anderson, Jr., Carrie Birkhofer, Ceil Cirillo, June Padilla Ponce, Rachael Spencer

Guests Present: Nancy Brown, Cabrillo College Philosophy Instructor, and Ethics Bowl Team  
Nancy Phillips, Reading Department Chair  
Bridgete Clark, Director Dental Hygiene  
Michelle Donohue, Dean of Student Services

Staff Present: Eileen Hill, Nancy Machado, Caitlin Bonura, Lori Hood

Call to Order

S. Snodgrass called the meeting to order at 12:10 pm.

Approval of Agenda

Motion: MSC: L. Lapidés/C. Biancalana. The committee voted unanimously to approve the Board agenda.

Approve Board Meeting Minutes

Motion: MSC: G. Reece/O. Brown.

The following Board Members voted to approve the minutes of November 1, 2016:

Pegi Ard, Claire Biancalana, Owen Brown, Linda Burroughs, Linda Downing, Laurel Jones, Kelly Nesheim, Patty Quillin, Gary Reece, Maria Esther Rodriguez, Gun Ruder, Stephen Snodgrass and Kathleen Welch.

The following Board Members abstained:

Jess Brown, Enrique Buelna, Lee Duffus, David Heald, Leola Lapidés, Victoria Lewis and Carlos Palacios and William Ow.

The following Board Members were absent:

Alan Aman, Carsbia Anderson, Carrie Birkhofer, Ceil Cirillo, June Padilla Ponce and Rachael Spencer.

### Public Comment Opportunity

There were no members of the public in attendance.

### Special Presentations

Nancy Brown, Philosophy Instructor, gave an overview of the Ethics Bowl competition and reported that Cabrillo's team was the first in the competition's 21-year history to win the regional Competition against four-year colleges and universities from California, Utah and Arizona. Two team members spoke about the experience and their overall positive experiences as students of Cabrillo College.

Two recipients of faculty grants provided through the Foundation spoke about their projects and how they help students. Nancy Phillips, Reading Department Chair, described the HUB, which is a tutoring center for Cabrillo students. One of the student tutors from the HUB spoke of her positive experience being tutored which inspired her to become a tutor. Bridgete Clark, Director of Dental Hygiene, introduced the Conduction Local Anesthesia Model she purchased with grant funds. A Dental Hygiene student described how valuable this tool is to practice giving anesthesia shots.

### Reports

Cabrillo President L. Jones gave an overview of Cabrillo's current focus on its next strategic plan and updated mission statement. Community Forums are being held in different locations throughout Santa Cruz County to obtain feedback on the community's perspective of Cabrillo. The Board will have its own Community Forum on March 27<sup>th</sup>, 8:00 - 9:30 am at the Sesnon House. A summary report will be presented once all of the Community Forums have been completed.

Vice President of Instruction, K. Welch gave an overview of instructional highlights. She reported on an application for an Innovation Grant to develop a pathway for high school students to take prerequisite courses for the nursing program at Cabrillo so that they are able to enter the program right out of high school. She went on to describe several other grant-funded programs in place and new initiatives in the works.

Executive Director E. Hill reported that the Foundation Executive and Finance Committees have been working on CalPERS compliance and updating insurance services. She gave an overview of fundraising including new scholarships and a potential collaborative opportunity with other non-profits to support girls in Pajaro through a grant process with the Community Foundation. She also reported that the Foundation has been issuing a monthly E-newsletter and working on a new website. She introduced new team members Caitlin Bonura, Development Officer, and Lori Hood, Events Coordinator/Executive Assistant.



#### Approve Financial Statements

As of November 30, 2016, the total assets were \$29.5M and the ending net assets were \$28.1M. The revenue for unrestricted, non-endowed and endowed funds was \$2.1M in total. Total expenses were \$1.3M with a net surplus for all funds of \$715K. The total operating revenue was \$316,000 and expenses \$417,000. The operating deficit was \$101,000.

Motion: MSC: D. Heald/P. Ard. The committee voted unanimously to approve the November 30, 2016 Financial Statements.

#### Net Assets, Endowed Net Assets and Historical Gifts Chart

The ending net assets balance as of November 30, 2016 was \$28,140,152. The highest net assets level was \$28,250,584 as of September 30, 2016. The endowed net assets balance was \$24,360,746, the highest net assets balance reported by the Cabrillo College Foundation. The endowed historical gifts value was \$20,323,345, the highest reported by the Cabrillo College Foundation.

#### Insurance RFP Update

The Finance Committee requested the Foundation send an RFP for insurance coverage. The Foundation's current policies will expire March 5, 2017. The Ad-Hoc Insurance Committee has received and will review two proposals submitted through the RFP process.

Motion: MSC: L. Lapidés/O. Brown. The committee voted unanimously to give the Ad-Hoc Insurance Committee the authority to select the insurance broker upon clarification of proposals.

#### Investment Activity review

The Cabrillo College Foundation Traditional Endowment pool return on investments update fiscal year to date as of December 31, 2016 (6 months) is as follows:

- Actual Return: 6.69%
- Benchmark Return 6.62%
- Difference .07%

The CCF return on investments for the UBS ESG Endowment pool return on investments fiscal year to date as of December 31, 2016 (6 months) is as follows:

- Actual Return: 2.50%
- Benchmark Return 2.46%
- Difference .04%

#### Fundraising Report

E. Hill reported the fundraising total from July 1, 2016 to December 31, 2016:

Outright gifts:	\$ 1,395,216
Unbooked Revocable Planned Gifts:	\$ <u>750,000</u>
Total:	\$ 2,145,216

E. Hill reported that the Foundation is on track to meet the goal of \$3M.

### President's Circle

C. Biancalana reported the President's Circle campaign has raised \$309,053 towards the \$318,000 goal as of February 13, 2017. Claire reported that 199 members have joined and 17 are new members. Claire reported we received our first \$15,000 donation from Patti Quillin and Reed Hastings.

### Cabrillo Advanced Program (CAP) Update

L. Lapidés described the CAP program as a scholarship and support program designed to increase the academic success of high risk, low income students and support their preparation for attending college. A solicitation has been sent to help reach the remaining budget goal of \$15,565. The CAP Ceremony for incoming 6<sup>th</sup> graders and graduating seniors will be on March 7, 2017 at 6:00 pm, Crocker Theater.

### Upcoming Deadlines and Dates

S. Snodgrass reviewed the Budget Timeline, 990 Timeline, and Committee Calendar and Roster.

### Adjournment

The meeting was adjourned at 1:22 PM.

BOARD OF DIRECTORS ATTENDANCE CHART

Board of Directors	11/10/15	2/9/16	5/10/16	9/13/16	11/1/16	2/14/17
Alan Aman	A	P	A	P	P	P
Carsbia Anderson, Jr.	N/A	N/A	N/A	P	P	A
Pegi Ard	P	P	A	A	P	P
Claire Biancalana	P	P	P	A	P	P
Carrie Birkhofer	P	P	P	P	P	A
Jess Brown	P	P	P	P	A	P
Owen Brown	P	P	P	P	P	P
Enrique Buelna	P	P	P	P	A	P
Linda Burroughs	P	P	P	A	P	P
Ceil Cirillo	A	P	P	A	P	A
Linda Downing	P	P	A	P	P	P
Lee Duffus	A	P	P	A	A	P
David Heald	A	P	P	A	A	P
Laurel Jones	P	P	P	P	P	P
Leola Lapidés	P	P	P	P	A	P
Victoria Lewis	A	A	P	P	A	P
Kelly Nesheim	P	P	P	P	P	P
William Ow	A	P	P	P	A	P

Cabrillo College Foundation Board of Directors

Meeting Minutes of February 14, 2017

Page 5 of 5

Carlos Palacios	P	A	A	A	A	P
June Padilla Ponce	A	A	P	P	P	A
Patty Quillin	N/A	N/A	N/A	A	P	P
Gary Reece	P	A	A	P	P	P
Maria Esther Rodriguez	N/A	N/A	N/A	P	P	P
Gun Ruder	N/A	N/A	N/A	P	P	P
Steve Snodgrass	A	P	P	P	P	P
Rachael Spencer	P	A	P	A	P	A
Kathleen Welch	P	P	P	P	P	P

*P=Present, A=Absent, N/A=Not applicable, not on the Board at the time. Based on Board of **Director's meeting minutes**. Please contact Cabrillo College Foundation if you believe this chart is in error.*

2016-17 BOARD MEETINGS

*Tuesdays, 12:00 PM – 2:00 PM - Sesnon House unless otherwise noted*

May 9, 2017

(Watsonville Center)

# Cabrillo College

Volume 5, Issue 5

Newsletter Date: 05/01/2017

Hello  
May

**Congratulations  
Cabrillo  
Community  
College's  
Graduating Class  
of 2017!**

## **Kudos, College Happenings & In the News:**

### ***Cabrillo's own HSERV Student Honored by the County Board of Supervisors...***

Shout out to Tatiana Dias-Martins who has been volunteering at the Probation Department and has been honored for her hard work and competency. She is now managing a small caseload! *Kudos Tatiana!*



### **6 Star Volleyball Athletes Sign Letters of Intent...**

*They will be attending Humbolt State, San Francisco State and Great Falls. All will be receiving athletic scholarships and have worked very hard to achieve these incredible awards.*

***Awesome!***

*L to R: Natalie Picone, Savannah Horton, Olivia Tabron, Vanessa Ditz, Eden Fukushima, and Melissa Gonzalez*

### **UCSC Santa Cruz's 2017 Karl S. Pister Leadership Opportunity Program Award Recipient Named...**

Cabrillo Student Laura Florez-Lopez was recently awarded this prestigious award. It consists of a \$10,000 annual scholarship, awardable over two years, as well as opportunities for paid or volunteer summer work experience tailored to complement their academic studies, between their junior and senior year.

Great Job Laura!



***"Set out each  
day believing  
in your  
dreams.  
Know without  
a doubt that  
you were  
made for great  
things."***  
*Josh Hinds*



### **Rob Johnstone returns to Cabrillo...**

#### **Connecting Guided Pathways to Equity**

Another "Brown Bag Lunch", hosted by Leading from the Middle, was held on Friday, April 28th. This discussion delved into the important connections between Guided Pathways and Equity. Cabrillo looks forward to our next steps as a participant in the Statewide California Guided Pathways Initiative!



*Breakthroughs happen here...*

**May 6th is  
National  
Teacher's Day...**

**Thank a  
teacher!**

“One book, one pen,  
one child, and one  
**teacher**,  
can change the world.”  
— Malala Yousafzai

**April 17—22**

Celebrations for Earth Week were plentiful across the Cabrillo Campus. Information on sustainability and composting, a science climate forum, a bike ride, and a BBQ, were just a few of the activities.

Thank you to all who helped make the week a success!

### **Employee and Volunteer Appreciation....**

Cupcakes and lemonade were served at both our Aptos and Watsonville

campuses on Friday, April 21st to celebrate and appreciate all who help to make Cabrillo shine!

**Thank you all for your work and dedication every day!**

*L to R: Angela Hoyt, Kathie Welch, Victoria Lewis (Aptos)*

*Not pictured; Laurel Jones (Watsonville)*



**Cabrillo College  
Main Campus :  
6500 Soquel Drive  
Aptos, CA 95003  
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Watsonville Center  
Cabrillo College  
318 Union Street  
Watsonville, CA  
95076  
(831)786-4700**

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Www.cabrillo.edu**



### **4th Annual Bob Swenson Memorial Golf Tournament...**

The Cabrillo College Athletic Department would like to invite you to take part the 4th Annual Bob Swenson Memorial Golf

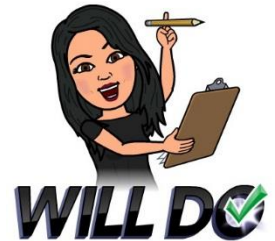
Tournament. This has been a great event in the past and helps us raise the funds we need to provide our student-athletes with a quality experience here at Cabrillo College. The money we raise supports our student athletes by helping fund equipment, uniforms, travel expenses and facility maintenance. We would love to have you join us at Seascape Golf Club on Friday June 2 for a day of golf and Cabrillo camaraderie. There are many ways you can help support our golf tournament,

**Please register at [bit.do/CabrilloGolf](http://bit.do/CabrilloGolf)**

# Executive Director Report: May 2, 2017

## Administration

- 2017-18 Budget Work
- Form 990
- Website Reconstruction
- 2017-18 Board Members



## Fundraising

- Raised \$3,033,665 towards \$3M annual goal
- Surpassed President's Circle goal, \$331,158 raised
- 2017 Women's Educational Success campaign launched
- Proposals/Solicitation Meetings to support scholarships and Guided Pathways (\$15,000 to \$250,000 solicitations)
- Submitted Community Foundation proposal in collaboration with 5 other organizations—Girls In Pajaro Valley Initiative (\$450,000 request)
- Planned Giving: one gift annuity and two planned gifts



## Upcoming Events

- American Dream Scholarship Ceremony: June 1, 2017
- President's Circle Crawfish Boil at the home of Andrew and Marilyn Calciano (PC members \$1,500+): June 22, 2017
- Cabrillo Stage Play & Reception (PC members \$1500+): July 21, 2017
- Next Board of Directors Meeting: September 12, 2017  
11:00 am, Optional walking tour  
12:00 pm, Meeting





# Cabrillo College

## Foundation

DATE: April 25, 2017

TO: Board of Directors

FROM: Eileen Hill

### Officers

#### President

Stephen Snodgrass

#### Vice President

Leola Lapides

#### Secretary

William Ow

#### Chief Financial Officer

Alan Aman

#### Past President

Linda Burroughs

#### Community Representatives

Pegi Ard

Claire Biancalana

Carrie Birkhofer

Jess Brown

Owen Brown

Ceil Cirillo

Linda Downing

Lee Duffus

David Heald

Kelly Nesheim

June Padilla Ponce

Carlos Palacios

Patty Quillin

Maria Esther Rodriguez

Gun Ruder

#### College Trustee Representatives

Rachael Spencer

Gary Reece

#### College Staff Representatives

Laurel Jones

President

Victoria Lewis

VP Administrative Services

Kathleen Welch

VP Instruction

Carsbia Anderson

VP Student Services

Enrique Buelna

Faculty Representative

#### Executive Director

Eileen Hill

July 1, 2016 to April 25, 2017

2016-17 Outright Gifts Fundraising Total

\$ 2,233,665

2016-17 Unbooked Revocable Planned Gifts

\$ 800,000

**Total**

**\$3,033,665**

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2016-17 Fundraising Goal for Outright and Unbooked Revocable Planned Gifts \$ 3,000,000

Recorded Gifts 7-1-16 to 4-25-17:

Monterey Peninsula Foundation (Athletics, CAP, Youth Chorus, Nursing & STEM Tutoring)	\$ 242,000
Jewish Communal Fund (Foster Youth)	\$ 125,000
The Grove Foundation (Scholarships)	\$ 110,000
Patty Quillin & Reed Hastings (President's Circle, Scholarships, STEM Tutoring, WES & 4 <sup>th</sup> Grade Experience)	\$ 105,100
The Richard & Mary Solari Charitable Trust (President's Circle & Scholarships)	\$ 105,000
SD Trombetta Foundation (Children's Center & Scholarships)	\$ 90,000
Joan Griffiths (ACE, President's Circle, Scholarship, Stroke Center, Tutorials & WES)	\$ 61,320
Rachael Spencer & Kevin Rooney (Scholarships & WES)	\$ 50,402
CFSCC (ACE & Cabrillo Gallery)	\$ 45,000
Assoc Students of Cabrillo College Student Senate (Scholarships & Student Emergency Program)	\$ 44,000
Brian & Patti Herman (Athletics, Cabrillo Stage, President's Circle, Scholarships & WES)	\$ 42,500
Joseph Padula Trust (Scholarships)	\$ 40,600
Fran Anderson Trust (Stroke Center)	\$ 35,088
Bob and Sharon Bailey (Chorus & Scholarships)	\$ 31,000
Astrid Atkinson (Scholarships)	\$ 30,000
Darryl Dill Trust (Scholarships)	\$ 25,605
William & Lupe Burgstrom (CAP)	\$ 25,000
Dale O'Rourke (Unrestricted)	\$ 20,325
Jill and Dick Wilson (Scholarships)	\$ 20,079
Esther & Gerry Levandoski (President's Circle & CAP)	\$ 15,170
Catherine & Kenneth Waldvogel (Scholarship)	\$ 15,100
Virginia Coe (Scholarship)	\$ 15,000
Barbara Canfield (President's Circle & WES)	\$ 14,907
Claire Biancalana & William Kelsay (Athletics, President's Circle, Scholarship & WES)	\$ 13,226
Foundation for CA Community Colleges (Scholarships)	\$ 12,100
Bill & Brigid Simpkins (CAP, Stroke Center & Water Polo)	\$ 12,100
Dorothy Miller (CAP & Unrestricted)	\$ 10,500
Snap-Raise (Baseball)	\$ 10,152
Gifts under \$10,150 (2,871 of 2,898 total donors)	<u>\$ 867,391</u>
Total Outright Gifts	\$ 2,233,665
Total Unbooked Revocable Planned Gifts	<u>\$ 800,000</u>
<b>TOTAL</b>	<b>\$3,033,665</b>

**Notes:** 1. For 2016-17, the Cabrillo College Foundation has been notified of two planned giving gifts of \$800,000.

The cumulative unbooked revocable planned gifts total is \$24,958,000

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[www.cabrillo.edu/associations/foundation](http://www.cabrillo.edu/associations/foundation)

**Cabrillo College Foundation  
Fundraising Dashboard 2016-17**

updated 5/2/2017

Gift Amount			
Outright Gifts and Unbooked Revocable Planned Gifts Range	Twelve-month 2016-17 Goal	7-1-16 to 6-30-17	Percent of Goal
Transformational Gift \$500,000+	\$500,000	\$750,000	150%
Major Gifts \$25,000 to \$499,999	\$1,500,000	\$1,126,485	75%
Gifts \$1,000 to \$24,999	\$750,000	\$842,788	112%
Gifts < \$1,000	\$250,000	\$314,092	126%
TOTAL	\$3,000,000	\$3,033,365	101%

Total cumulative unbooked revocable planned gifts level for all years is \$24,958,000 as of April 7, 2017

Number of Gifts			
Outright Gifts and Unbooked Revocable Planned Gifts Range	Twelve-month 2016-17 Goal	7-1-16 to 6-30-17	Percent of Goal
Transformational Gift \$500,000+	1	1	100%
Major Gifts \$25,000 to \$499,999	15	16	107%
Gifts \$1,000 to \$24,999	300	346	115%
Gifts < \$1,000	3,500	3,694	106%
TOTAL	3,816	4,057	106%

Annual Campaigns			
	Twelve-month 2016-17 Goal	7-1-16 to 6-30-17	Percent of Goal
President's Circle	\$318,000	\$331,158	104%
Annual Fund	\$93,281	\$113,267	121%



## Reconstruction of Cabrillo College Foundation website

The average lifespan of a website is 3 to 7 years. Our website was built in 2010, so it is at the end of its lifespan. According to Google Analytics, the CCF website had increased activity from new users via mobile/tablet from 2015 to 2016; however, online giving remains stagnant. Updates to the site need to address this trend.

### History of online donations:

2014 online donations 225 totaling \$89,699  
2015 online donations 193 totaling \$78,125  
2016 online donations 227 totaling \$66,515

Giving Days are becoming an increasingly popular way to fundraise and engage a younger audience. In order to pilot such a campaign for CCF, we need a more nimble giving page structure that can be adapted to a giving day type event. Our current donation page does not tolerate significant editing .

### **Mobile Friendly**

Current design standards allow a website to flex and adapt to the size of screen, so those who open a web page on a smartphone could be shown the same site as the person opening it on their laptop. Since responsive design has been around for a few years, at this point any site not using it not only looks old, it's difficult to use on the range of mobile devices out there.

### **Add flexibility to our Donate Now page**

In attempt to connect with younger donors, we need to improve our check out process online including ease of use for mobile users.

Adding recurring/subscription billing, direct link to checking accounts (to avoid fees), and PayPal option should improve the experience in order to capture more donors through our website.

Additionally, adding the function for crowd-sourced campaigns will consolidate campaigns currently happening on campus and help us maintain our brand.

We suspect the number of online donations to increase with the ability to improve the mobile donating process. Network for Good reports that while overall giving is up by %2, online giving increased 9% in 2015.

## **ADA Compliant**

Web accessibility refers to the inclusive practice of removing barriers that prevent interaction with, or access to websites, by people with disabilities. When sites are correctly designed, developed and edited, all users have equal access to information and functionality.

Our Governance page relies heavily on pdf documents, which were not generated to be ADA compliant and according to an online reading tool (<http://webaim.org>) were not readable.

## **Incorporate latest design standards:**

Every year web standards the change radically and techniques to build web sites become more advanced in order to comply with the latest standards, such as the site or page has valid HTML, CSS and JavaScript. As our site was built in 2010, it can be assumed that it does not meet current standards.

## **Update Look and Feel to tell our story**

Web design elements also go in and out of style—gradients, borders, drop-shadows, dark- and light-colored backgrounds, tiling patterns, small type, large type, fat footers, mega-menus. Most viewers can't necessarily tell you what design elements on your site are "in" or "out," but they know when something looks dated. CCF looks forward to an update particularly to look appealing and fresh to a younger donor.

## **Timeline (5 – 9 months)**

Discovery and planning (2 to 6 weeks)

Design (4 to 10 weeks)

Content writing and assembly (5 to 8 weeks)

Development and programming (6 to 10 weeks)

Beta testing and review (2 to 3 weeks)

Site launch (1 day to 2 days)

Maintenance and Enhancements (ongoing)

## **Summary of Outcomes**

1. Updated look/feel of website
2. Mobile Friendly
3. ADA Compliant
4. More/Easier Donation Options
5. Capability for a Giving Day Campaign to double our online donations over the previous year

**CABRILLO COLLEGE FOUNDATION**  
**February 28, 2017 Condensed Narrative**  
**Updated May 1, 2017**

**(1) Balance Sheet**

- **Total Assets:**  
Total assets of \$29.8M are \$5M over prior year due to positive investment results, receipt of pledge payments and higher contributed income.
- **Receivables:**  
Total pledges receivable are \$473K less than prior year. The Cabrillo College Foundation has five multi-year pledges scheduled to be completed in the 2016-17 fiscal year. Pledges receivable will continue to decline until new pledges or bequests are received.
- **Liabilities:**  
Liabilities of \$1.0M are consistent with prior year.
- **Net Assets:**  
Total net assets of \$29.8M are \$5M over prior year.

**(2) Income Statement**

- **Revenue:**  
Earned income as of February 28, 2017 is \$2.4M compared to the prior year balance of -\$1.3M. Contributed income of \$1.9M is \$560K over the prior year restricted contributions total.
- **Surplus/Deficit:**  
As of February 28, 2017, the Cabrillo College Foundation has a \$2.4M surplus over the prior year \$1.6M deficit.

**(3) Operational Budget to Actual**

- **Revenue:**  
Operating revenue of \$671K is \$17K favorable vs budget.
- **Expenses:**  
Operating expenses of \$630K are \$15K favorable vs projection.
- **Surplus/Deficit:**  
The operating fund surplus is \$41,213 as of February 28, 2017. The Cabrillo College Foundation is projecting a surplus of \$50K for the 2016-17 fiscal year.

#### **(4) Investment Report**

- Our return on investments for the UBS Long-Term Pool fiscal year to date as of March 31, 2017 (9 months) is as follows:  
  

Actual Return:	11.54%
Benchmark Return:	11.25%
Difference:	0.29%
- Our return on investments for the UBS ESG Long-Term Pool fiscal year to date as of March 31, 2017 (9 months) is as follows:  
  

Actual Return:	6.23%
Benchmark Return:	6.92%
Difference :	-0.69%

**Cabrillo College Foundation**  
**Balance Sheet as of February 29, 2017**  
 With Comparative Totals as of February 29, 2016

	Operating 2/29/16 A	Nonendowed 2/29/16 B	Endowed 2/29/16 C	Total 2/29/16 D	Total 2/28/16 E
<b>ASSETS</b>					
CASH AND INVESTMENTS					
CASH					
WELLS FARGO BANK	\$21,136.87	\$277,944.88	\$222,370.84	\$521,452.59	\$380,501
BAY FEDERAL	\$6,155.09	\$0.00	\$1,289.59	\$7,444.68	\$7,444
SANTA CRUZ COUNTY BANK	\$10,310.38	\$196,364.00	\$0.00	\$206,674.38	\$206,365
CALVERT	\$0.00	\$0.00	\$0.00	\$0.00	\$12,904
UBS	\$621,787.67	\$2,388,378.10	\$169,731.00	\$3,179,896.77	\$2,678,558
BAY FEDERAL CREDIT UNION	\$22,447.39	\$150,000.00	\$0.00	\$172,447.39	\$171,947
LIGHTHOUSE BANK	\$17,964.83	\$233,000.00	\$0.00	\$250,964.83	\$249,503
UBS GATES	\$15,249.42	\$51,892.13	\$0.00	\$67,141.55	\$67,125
SUBTOTAL CASH	\$715,051.65	\$3,297,579.11	\$393,391.43	\$4,406,022.19	\$3,774,347
INVESTMENTS					
DEUTSCHE ASSET AND WEALTH MANAGEMENT	\$0.00	\$0.00	\$0.00	\$0.00	\$22,291
UBS TITLE V HOLDING	\$4.61	\$21,000.00	\$0.00	\$21,004.61	\$21,001
UBS	\$164,636.05	\$0.00	\$23,607,898.07	\$23,772,534.12	\$19,554,905
UBS TITLE V	\$0.00	\$0.00	\$1,011,949.51	\$1,011,949.51	\$903,989
UBS TITLE III	(\$140.75)	\$0.00	\$171,664.28	\$171,523.53	\$153,379
UBS ESG	\$8,798.99	\$0.00	\$588,255.46	\$597,054.45	\$0
VANGUARD	\$0.00	\$0.00	\$10,941.50	\$10,941.50	\$0
SUBTOTAL INVESTMENTS	\$173,298.90	\$21,000.00	\$25,390,708.82	\$25,585,007.72	\$20,655,566
TOTAL CASH AND INVESTMENTS	\$888,350.55	\$3,318,579.11	\$25,784,100.25	\$29,991,029.91	\$24,429,913
RECEIVABLES					
PLEDGES					
PLEDGES - UNRESTRICTED	\$17,086.65	\$0.00	\$0.00	\$17,086.65	\$24,692
PLEDGES - ANNUAL FUND	\$40,277.84	\$0.00	\$0.00	\$40,277.84	\$34,457
PLEDGES - RESTRICTED	\$0.00	\$214,487.00	\$317,457.60	\$531,944.60	\$1,001,527
ALLOWANCE FOR UNCOLLECTIBLE PLEDGES	(\$14,097.34)	\$0.00	\$0.00	(\$14,097.34)	(\$12,060)
SUBTOTAL PLEDGES	\$43,267.15	\$214,487.00	\$317,457.60	\$575,211.75	\$1,048,615

**Cabrillo College Foundation**  
**Balance Sheet as of February 29, 2017**  
 With Comparative Totals as of February 29, 2016

	Operating 2/29/16 A	Nonendowed 2/29/16 B	Endowed 2/29/16 C	Total 2/29/16 D	Total 2/28/15 E
ACCOUNTS RECEIVABLE					
ACCOUNTS RECEIVABLE	\$264.92	\$803.00	\$0.00	\$1,067.92	\$4,215
TOTAL ACCOUNTS RECEIVABLE	\$264.92	\$803.00	\$0.00	\$1,067.92	\$4,215
OTHER RECEIVABLES					
SPLIT INTEREST AGREEMENTS	\$39,737.64	\$85,884.15	\$51,931.62	\$177,553.41	\$330,212
SUBTOTAL OTHER RECEIVABLES	\$39,737.64	\$85,884.15	\$51,931.62	\$177,553.41	\$330,212
TOTAL RECEIVABLES	\$83,269.71	\$301,174.15	\$369,389.22	\$753,833.08	\$1,383,042
FIXED ASSETS					
OFFICE EQUIPMENT	\$70,091.76	\$0.00	\$0.00	\$70,091.76	\$70,092
ACCUMULATED DEPRECIATION	(\$70,091.76)	\$0.00	\$0.00	(\$70,091.76)	(\$70,092)
TOTAL FIXED ASSETS (NET)	\$0.00	\$0.00	\$0.00	\$0.00	\$0
PREPAID EXPENSES	\$0.00	\$0.00	\$0.00	\$0.00	\$7,941
PREPAID RETIREMENT EXPENSE	\$26,289.88	\$0.00	\$0.00	\$26,289.88	\$35,960
<b>TOTAL ASSETS</b>	<b>\$997,910.14</b>	<b>\$3,619,753.26</b>	<b>\$26,153,489.47</b>	<b>\$30,771,152.87</b>	<b>\$25,856,857</b>

**Cabrillo College Foundation**  
**Balance Sheet as of February 29, 2017**  
 With Comparative Totals as of February 29, 2016

	Operating 2/29/16 A	Nonendowed 2/29/16 B	Endowed 2/29/16 C	Total 2/29/16 D	Total 2/28/16 E
<b>LIABILITIES AND NET ASSETS</b>					
<b>LIABILITIES</b>					
PAYABLES AND ACCRUED EXPENSES					
ACCOUNTS PAYABLE	\$10,216.36	\$16,022.10	\$0.00	\$26,238.46	\$13,064
ACCRUED PTO	\$18,097.28	\$0.00	\$0.00	\$18,097.28	\$40,201
ACCRUED EXPENSES	\$66,533.56	\$0.00	\$0.00	\$66,533.56	\$15,617
PAYROLL WITHHOLDINGS	\$1,632.03	\$0.00	\$0.00	\$1,632.03	\$0
SECTION 125 WITHHOLDINGS	\$1,150.12	\$0.00	\$0.00	\$1,150.12	\$1,236
ACCRUED RETIREE MEDICAL BENEFITS	\$54,850.00	\$0.00	\$0.00	\$54,850.00	\$78,634
SUBTOTAL PAYABLES, ACCRUED EXPENSES	\$152,479.35	\$16,022.10	\$0.00	\$168,501.45	\$148,752
SCHOLARSHIPS AWARDED					
CAP SCHOLARSHIPS	\$0.00	\$30,997.01	\$463,674.85	\$494,671.86	\$517,108
ENDOWED SCHOLARSHIPS	\$0.00	\$0.00	\$1,534.49	\$1,534.49	\$1,534
ANNUAL SCHOLARSHIPS	\$0.00	\$95,021.13	\$0.00	\$95,021.13	\$143,435
SUBTOTAL SCHOLARSHIPS AWARDED	\$0.00	\$126,018.14	\$465,209.34	\$591,227.48	\$662,077
FACULTY, WES GRANTS PAYABLE					
WES GRANTS	\$0.00	\$0.00	\$6,312.00	\$6,312.00	\$7,527
SUBTOTAL FACULTY, WES GRANTS PAYABLE	\$0.00	\$0.00	\$6,312.00	\$6,312.00	\$7,527
OTHER LIABILITIES					
UNFUNDED PERS PENSION LIABILITY	\$247,461.00	\$0.00	\$0.00	\$247,461.00	\$185,516
DEFERRED REVENUE - PERS	\$65,392.00	\$0.00	\$0.00	\$65,392.00	\$71,917
DEFERRED OUTFLOWS - FY PERS EXPENSE	(\$45,176.00)	\$0.00	\$0.00	(\$45,176.00)	\$0
DEFERRED OUTFLOWS - PENSION INVESTMENTS	(\$42,938.00)	\$0.00	\$0.00	(\$42,938.00)	\$0
SUBTOTAL OTHER LIABILITIES	\$224,739.00	\$0.00	\$0.00	\$224,739.00	\$257,433
<b>TOTAL LIABILITIES</b>	<b>\$377,218.35</b>	<b>\$142,040.24</b>	<b>\$471,521.34</b>	<b>\$990,779.93</b>	<b>\$1,075,789</b>
<b>NET ASSETS</b>					
OPERATING NET ASSETS					
DESIGNATED-OPERATING RESERVE	\$228,839.48	\$0.00	\$0.00	\$228,839.48	\$477,458
DESIGNATED-EQUIPMENT	\$15,000.00	\$0.00	\$0.00	\$15,000.00	\$15,000
DESIGNATED-HURD TRIBUTE	\$294,302.18	\$0.00	\$0.00	\$294,302.18	\$294,302

**Cabrillo College Foundation**  
**Balance Sheet as of February 29, 2017**  
 With Comparative Totals as of February 29, 2016

	Operating 2/29/16 A	Nonendowed 2/29/16 B	Endowed 2/29/16 C	Total 2/29/16 D	Total 2/28/15 E
DESIGNATED-RETIREE MEDICAL BENEFITS	\$41,337.00	\$0.00	\$0.00	\$41,337.00	\$0
UNDESIGNATED	\$41,213.13	\$0.00	\$0.00	\$41,213.13	(\$193,553)
SUBTOTAL OPERATING NET ASSETS	\$620,691.79	\$0.00	\$0.00	\$620,691.79	\$593,207
NET ASSETS - OTHER	\$0.00	\$3,477,713.02	\$0.00	\$3,477,713.02	\$3,184,903
NET ASSETS-HISTORICAL GIFTS	\$0.00	\$0.00	\$25,681,968.13	\$25,681,968.13	\$21,002,957
<b>TOTAL NET ASSETS</b>	<b>\$620,691.79</b>	<b>\$3,477,713.02</b>	<b>\$25,681,968.13</b>	<b>\$29,780,372.94</b>	<b>\$24,781,068</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$997,910.14</b>	<b>\$3,619,753.26</b>	<b>\$26,153,489.47</b>	<b>\$30,771,152.87</b>	<b>\$25,856,857</b>
 BEGINNING BALANCE WITH CURRENT YEAR ADJUSTMENTS	 \$579,478.66	 \$3,517,731.82	 \$23,324,509.59	 \$27,421,720.07	 \$26,332,665
 NET SURPLUS/(DEFICIT)	 \$41,213.13	 (\$40,018.80)	 \$2,357,458.54	 \$2,358,652.87	 (\$1,551,597)
 ENDING NET ASSETS	 \$620,691.79	 \$3,477,713.02	 \$25,681,968.13	 \$29,780,372.94	 \$24,781,068



**Cabrillo College Foundation**  
**Income Statement by Fund as of February 28, 2017**  
 With Comparative Totals as of February 29, 2016

	Operating 2/28/17 A	Nonendowed 2/28/17 B	Endowed 2/28/17 C	Total 2/28/17 D	Total 2/29/16 E
<b>REVENUE</b>					
EARNED INCOME					
INTEREST AND DIVIDENDS	\$15,014	\$70	\$351,336	\$366,420	\$351,915
UNREALIZED GAIN/LOSS ON SECURITIES	(\$11,517)	\$198	\$1,539,404	\$1,528,085	(\$2,123,508)
REALIZED GAINS/LOSSES	\$5,847	(\$71)	\$298,214	\$303,990	\$217,236
FEE INCOME	\$66,521	\$0	\$0	\$66,521	\$37,983
OPERATIONAL ENDOWMENT PAYOUT	\$14,030	\$0	\$0	\$14,030	\$14,232
ENDOWMENT MANAGEMENT FEE	\$168,954	\$0	\$0	\$168,954	\$155,885
TOTAL EARNED INCOME	\$258,850	\$197	\$2,188,953	\$2,448,000	(\$1,346,256)
CONTRIBUTED INCOME					
RESTRICTED CONTRIBUTIONS	\$0	\$965,386	\$531,251	\$1,496,637	\$869,535
ANNUAL FUND	\$56,321	\$0	\$0	\$56,321	\$45,008
PRESIDENT'S CIRCLE GIFTS	\$303,614	\$0	\$0	\$303,614	\$296,813
UNRESTRICTED GIFTS	\$41,351	\$0	\$0	\$41,351	\$57,030
INTERFUND CONTRIBUTIONS	(\$141)	\$903	(\$762)	\$0	\$0
IN KIND REVENUE	\$0	\$18,421	\$0	\$18,421	\$88,200
IN KIND REVENUE-RENT	\$10,896	\$0	\$0	\$10,896	\$10,896
TOTAL CONTRIBUTED INCOME	\$412,041	\$984,710	\$530,489	\$1,927,240	\$1,367,481
<b>TOTAL REVENUE</b>	<b>\$670,891</b>	<b>\$984,907</b>	<b>\$2,719,442</b>	<b>\$4,375,240</b>	<b>\$21,225</b>
<b>EXPENSES</b>					
SALARIES & WAGES					
SALARIES & WAGES	\$328,933	\$4,885	\$0	\$333,819	\$342,905
TOTAL SALARIES & WAGES	\$328,933	\$4,885	\$0	\$333,819	\$342,905
PAYROLL TAXES, BENEFITS					
PAYROLL TAXES, BENEFITS	\$142,124	\$671	\$0	\$142,795	\$134,954
TOTAL PAYROLL TAXES, BENEFITS	\$142,124	\$671	\$0	\$142,795	\$134,954
ADVERTISING	\$787	\$0	\$0	\$787	\$599
PRINTING	\$17,995	\$0	\$0	\$17,995	\$12,674
PHOTOS	\$2,100	\$0	\$0	\$2,100	\$2,000
CONSULTANTS	\$31,041	\$0	\$0	\$31,041	\$18,714

**Cabrillo College Foundation**  
**Income Statement by Fund as of February 28, 2017**  
 With Comparative Totals as of February 29, 2016

	Operating 2/28/17 A	Nonendowed 2/28/17 B	Endowed 2/28/17 C	Total 2/28/17 D	Total 2/29/16 E
FOOD	\$60	\$0	\$0	\$60	\$156
FUNDRAISING/EVENTS/PUBLIC RELATIONS	\$24,279	\$0	\$0	\$24,279	\$25,078
OFFICE EQUIP & MAINTENANCE					
OFFICE EQUIPMENT	\$517	\$0	\$0	\$517	\$381
SOFTWARE MAINTENANCE	\$10,236	\$0	\$0	\$10,236	\$9,576
TOTAL OFFICE EQUIP & MAINTENANCE	\$10,753	\$0	\$0	\$10,753	\$9,957
BOOKS/PUBLICATIONS/MEMBERSHIPS	\$1,075	\$0	\$0	\$1,075	\$1,300
OFFICE SUPPLIES	\$6,018	\$0	\$0	\$6,018	\$4,914
POSTAGE & MAILING SERVICE	\$2,273	\$0	\$0	\$2,273	\$4,759
BOARD EXPENSES	\$307	\$0	\$0	\$307	\$1,654
OTHER EXPENSES					
MISCELLANEOUS	\$121	\$0	\$0	\$121	\$186
UNCOLLECTIBLE PLEDGES	\$35,953	\$150	\$100	\$36,203	\$27,118
MILEAGE & PARKING	\$96	\$0	\$0	\$96	\$79
INTERNET SERVICE	\$699	\$0	\$0	\$699	\$581
IT HOSTING SERVICE	\$4,002	\$0	\$0	\$4,002	\$4,002
BANK CHARGES	\$4,458	\$0	\$0	\$4,458	\$4,557
INVESTMENT FEES	\$49	\$0	\$110,932	\$110,981	\$103,447
MANAGEMENT FEES	\$0	\$0	\$164,636	\$164,636	\$155,885
DIRECTOR/OFFICER LIABILITY INS	\$2,971	\$0	\$0	\$2,971	\$3,137
LIABILITY AND PROPERTY INSURANCE	\$2,690	\$0	\$0	\$2,690	\$2,534
TOTAL OTHER EXPENSES	\$51,038	\$150	\$275,668	\$326,856	\$301,524
IN KIND EXPENSE	\$0	\$18,421	\$0	\$18,421	\$88,200
IN KIND EXPENSE - RENT	\$10,896	\$0	\$0	\$10,896	\$10,896
PROJECT EXPENSES	\$0	\$917,217	\$0	\$917,217	\$328,080
CAF EXPENSES	\$0	\$0	\$21,715	\$21,715	\$77,223
SCHOLARSHIPS	\$0	\$83,582	\$64,600	\$148,182	\$207,235
<b>TOTAL EXPENSES</b>	<b>\$629,678</b>	<b>\$1,024,926</b>	<b>\$361,983</b>	<b>\$2,016,588</b>	<b>\$1,572,822</b>

**Cabrillo College Foundation**  
**Income Statement by Fund as of February 28, 2017**  
With Comparative Totals as of February 29, 2016

NET SURPLUS/(DEFICIT)	<u>\$41,213</u>	<u>(\$40,019)</u>	<u>\$2,357,459</u>	<u>\$2,358,653</u>	<u>(\$1,551,597)</u>
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# Cabrillo College Foundation

## Income Statement - Operating Budget as of 2/28/17

With Comparative Totals as of 2/28/16

	15-16 Actual 8 Months A	16-17 Actual 8 Months B	16-17 Budget 8 Months C	16-17 Actual To 16-17 Budget D	16-17 8 Mo. Actual and 4 Mos. Projected E	16-17 Annual Budget (Approved 5/10/16) F	Variance 16-17 8 Mos. Actual & 4 Mos. Projected to 16-17 Budget G
<b>REVENUE</b>							
EARNED INCOME							
INTEREST AND DIVIDENDS	\$9,082	\$15,014	\$9,000	\$6,014	\$17,600	\$13,500	\$4,100
UNREALIZED GAIN/LOSS ON SECURITIES	(\$11,051)	(\$11,517)	\$0	(\$11,517)	\$0	\$0	\$0
REALIZED GAINS/LOSSES	\$9,545	\$5,847	\$0	\$5,847	\$0	\$0	\$0
FEE INCOME	\$37,983	\$66,521	\$74,076	(\$7,555)	\$112,529	\$156,044	(\$43,515)
OPERATIONAL ENDOWMENT PAYOUT	\$14,232	\$14,030	\$14,232	(\$202)	\$14,030	\$14,232	(\$202)
ENDOWMENT MANAGEMENT FEE	\$155,885	\$168,954	\$169,663	(\$708)	\$339,325	\$339,325	\$0
<b>TOTAL EARNED INCOME</b>	<b>\$215,677</b>	<b>\$258,850</b>	<b>\$266,970</b>	<b>(\$8,120)</b>	<b>\$483,484</b>	<b>\$523,101</b>	<b>(\$39,617)</b>
CONTRIBUTED INCOME							
ANNUAL FUND	\$45,008	\$56,321	\$60,000	(\$3,679)	\$100,000	\$93,281	\$6,719
PRESIDENT'S CIRCLE GIFTS	\$296,813	\$303,614	\$310,000	(\$6,386)	\$330,000	\$318,000	\$12,000
UNRESTRICTED GIFTS	\$57,030	\$41,351	\$6,362	\$34,989	\$42,093	\$9,543	\$32,550
INTERFUND CONTRIBUTIONS	\$0	(\$141)	\$0	(\$141)	(\$141)	\$0	(\$141)
IN KIND REVENUE-RENT	\$10,896	\$10,896	\$10,896	\$0	\$16,344	\$16,344	\$0
<b>TOTAL CONTRIBUTED INCOME</b>	<b>\$409,747</b>	<b>\$412,041</b>	<b>\$387,258</b>	<b>\$24,783</b>	<b>\$488,296</b>	<b>\$437,168</b>	<b>\$51,128</b>
<b>TOTAL REVENUE</b>	<b>\$625,424</b>	<b>\$670,891</b>	<b>\$654,228</b>	<b>\$16,663</b>	<b>\$971,780</b>	<b>\$960,269</b>	<b>\$11,511</b>
<b>EXPENSES</b>							
SALARIES & WAGES							
SALARIES & WAGES	\$336,399	\$328,933	\$351,761	\$22,828	\$490,494	\$524,147	\$33,653
<b>TOTAL SALARIES &amp; WAGES</b>	<b>\$336,399</b>	<b>\$328,933</b>	<b>\$351,761</b>	<b>\$22,828</b>	<b>\$490,494</b>	<b>\$524,147</b>	<b>\$33,653</b>
PAYROLL TAXES, BENEFITS							
PAYROLL TAXES, BENEFITS	\$134,227	\$142,124	\$144,329	\$2,205	\$212,826	\$226,437	\$13,611
<b>TOTAL PAYROLL TAXES, BENEFITS</b>	<b>\$134,227</b>	<b>\$142,124</b>	<b>\$144,329</b>	<b>\$2,205</b>	<b>\$212,826</b>	<b>\$226,437</b>	<b>\$13,611</b>
ADVERTISING	\$599	\$787	\$1,750	\$963	\$900	\$1,750	\$850
PRINTING	\$12,674	\$17,995	\$18,600	\$605	\$18,600	\$20,600	\$2,000
PHOTOS	\$2,000	\$2,100	\$2,267	\$167	\$3,000	\$3,400	\$400
CONSULTANTS	\$18,714	\$31,041	\$21,213	(\$9,828)	\$43,222	\$25,775	(\$17,447)
FOOD	\$156	\$60	\$100	\$40	\$300	\$300	\$0

# Cabrillo College Foundation

## Income Statement - Operating Budget as of 2/28/17

With Comparative Totals as of 2/28/16

	15-16 Actual 8 Months A	16-17 Actual 8 Months B	16-17 Budget 8 Months C	16-17 Actual To 16-17 Budget D	16-17 8 Mo. Actual and 4 Mos. Projected E	16-17 Annual Budget (Approved 5/10/16) F	Variance 16-17 8 Mos. Actual & 4 Mos. Projected to 16-17 Budget G
FUNDRAISING/EVENTS/PUBLIC RELATIONS	\$25,078	\$24,279	\$29,298	\$5,019	\$47,644	\$49,965	\$2,321
OFFICE EQUIP & MAINTENANCE							
OFFICE EQUIPMENT	\$381	\$517	\$733	\$216	\$1,100	\$1,100	\$0
SOFTWARE MAINTENANCE	\$9,576	\$10,236	\$9,775	(\$461)	\$10,236	\$9,775	(\$461)
TOTAL OFFICE EQUIP & MAINTENANCE	\$9,957	\$10,753	\$10,508	(\$245)	\$11,336	\$10,875	(\$461)
BOOKS/PUBLICATIONS/MEMBERSHIPS	\$1,300	\$1,075	\$1,378	\$303	\$1,430	\$1,430	\$0
OFFICE SUPPLIES	\$4,914	\$6,018	\$4,050	(\$1,968)	\$6,750	\$6,075	(\$675)
POSTAGE & MAILING SERVICE	\$4,759	\$2,273	\$10,616	\$8,343	\$9,924	\$15,924	\$6,000
BOARD EXPENSES	\$1,654	\$307	\$1,033	\$726	\$2,066	\$2,066	\$0
OTHER EXPENSES							
MISCELLANEOUS	\$186	\$121	\$200	\$80	\$400	\$300	(\$100)
UNCOLLECTIBLE PLEDGES	\$25,790	\$35,953	\$22,568	(\$13,385)	\$35,953	\$33,852	(\$2,101)
MILEAGE & PARKING	\$79	\$96	\$330	\$234	\$495	\$495	\$0
INTERNET SERVICE	\$581	\$699	\$595	(\$104)	\$1,051	\$892	(\$159)
IT HOSTING SERVICE	\$4,002	\$4,002	\$2,668	(\$1,334)	\$4,002	\$4,002	\$0
BANK CHARGES	\$4,557	\$4,458	\$4,597	\$140	\$7,000	\$6,896	(\$104)
INVESTMENT FEES	\$0	\$49	\$0	(\$49)	\$49	\$0	(\$49)
DIRECTOR/OFFICER LIABILITY INS	\$3,137	\$2,971	\$2,736	(\$235)	\$4,414	\$4,104	(\$310)
LIABILITY AND PROPERTY INSURANCE	\$2,534	\$2,690	\$3,093	\$403	\$3,985	\$4,640	\$655
TOTAL OTHER EXPENSES	\$40,864	\$51,038	\$36,787	(\$14,250)	\$57,349	\$55,181	(\$2,168)
IN KIND EXPENSE - RENT	\$10,896	\$10,896	\$10,896	\$0	\$16,344	\$16,344	\$0
<b>TOTAL EXPENSES</b>	<b>\$604,192</b>	<b>\$629,678</b>	<b>\$644,586</b>	<b>\$14,908</b>	<b>\$922,185</b>	<b>\$960,269</b>	<b>\$38,084</b>
<b>NET SURPLUS/(DEFICIT)</b>	<b>\$21,232</b>	<b>\$41,213</b>	<b>\$9,642</b>	<b>\$31,571</b>	<b>\$49,595</b>	<b>\$0</b>	<b>\$49,595</b>

# Cabrillo College

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## Foundation

### MEMORANDUM

#### Officers

##### President

Stephen Snodgrass

##### Vice President

Leola Lapidés

##### Secretary

William Ow

##### Chief Financial Officer

Alan Aman

##### Past President

Linda Burroughs

##### Community Representatives

Pegi Ard

Claire Biancalana

Carrie Birkhofer

Jess Brown

Owen Brown

Ceil Cirillo

Linda Downing

Lee Duffus

David Heald

Kelly Nesheim

June Padilla Ponce

Carlos Palacios

Patty Quillin

Maria Esther Rodriguez

Gun Ruder

##### College Trustee Representatives

Rachael Spencer

Gary Reece

##### College Staff Representatives

Laurel Jones

President

Victoria Lewis

VP Administrative Services

Kathleen Welch

VP Instruction

Carsbia Anderson

VP Student Services

Enrique Buelna

Faculty Representative

##### Executive Director

Eileen Hill

DATE: May 2, 2017

TO: Board of Directors

FROM: Alan Aman

SUBJECT: 2017-18 Operating Budget Overview

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### Overview of 2017-18 Operating Budget compared to 2016-17 Projected Actual:

#### Revenue:

- The 2017-18 operating revenue of \$971,423 is projected to be \$11,830 more than the 2016-17 projected actual operating revenue of \$959,593.
- The endowment Management Fee is projected to be \$24,554 higher than 2016-17 primarily due to a \$2.7M increase in the endowed cash and investment balances.

#### Expenses:

- The 2017-18 operating expenses of \$981,423 projected to be \$60,866 more than the 2016-17 projected actual operating expense of \$920,557.
- The 2017-18 salary, benefits, and retiree benefits expense of \$731,424 is \$28,104 over 2016-17 projected actual. Salary increases for eligible employees were based on the CalPERS compliant Salary Schedule.
- Consultant's expense includes up to \$35,000 for Web Design in 2017-18. The Cabrillo College Foundation website needs to be updated to be mobile friendly, ADA compliant, and provide easier online giving.
- The operational reserves will cover the \$10,000 projected deficit for the one time cost of website reconstruction.

### Recommended Motion

Board of Directors approve the 2017-18 Operating Budget.

Cabrillo College Foundation Budget  
Planning Parameters 16-17 to 19-20  
Updated 5/2/2017

Description	Projected 2017-18	Projected 2018-19	Projected 2019-20
<b>INCOME:</b>			
INTEREST AND DIVIDENDS	Assume \$2,600,000 (3 year average operating and nonendowed cash balances) @ .90% unless rates change.	Assume \$2,600,000 (year average of operating and nonendowed cash balances @ 1% unless rates change.	Assume \$2,600,000 (year average of operating and nonendowed cash balances @ 1.10% unless rates change.
FEE INCOME - PROPOSAL INDIRECT	\$16,000 Joyce Foundation	\$5,000 Other	\$5,000 Other
FEE INCOME - OTHER	CAP 6% and WES 2.2% of total employee costs excluding Annual Fund and Clerical; Grove \$10K; Girls in Engineering \$1,250	CAP 6% and WES 2.2% of total employee costs excluding Annual Fund and Clerical; Grove \$10K; Girls in Engineering \$1,250	CAP 6% and WES 2.2% of total employee costs excluding Annual Fund and Clerical; Grove \$10K; Girls in Engineering \$1,250
FEE INCOME - GIFT FACILITATION	Five-year average of the 5% gift facilitation fees collected.	Five-year average of the 5% gift facilitation fees collected	Five-year average of the 5% gift facilitation fees collected
OPERATIONAL ENDOWMENT PAYOUT	4% of daily fund balance for previous 12 Trailing Quarters, no increase in fund balance from gifts (GL #8801, #8859 & #8322)	4% of daily fund balance for previous 12 Trailing Quarters, no increase in fund balance from gifts (GL #8801, #8859 & #8322)	4% of daily fund balance for previous 12 Trailing Quarters, no increase in fund balance from gifts (GL #8801, #8859 & #8322)
ENDOWMENT MANAGEMENT FEE	Annually begin with 6/30 cash and investments balance (includes Historical Gifts, Accumulated Earnings and Available to Spend). Add assumed \$500K projected net increase to endowment annually. Title IV and Title III endowments are not included in projection.		
ANNUAL FUND	\$95,000	\$90,000	\$90,000
PRESIDENT'S CIRCLE GIFTS	Previous year total plus \$3,000	Previous year total plus \$3,000	Previous year total plus \$3,000
UNRESTRICTED GIFTS	5 year average of unrestricted donations minus bequests over \$10K	5 year average of unrestricted donations minus bequests over \$10K	5 year average of unrestricted donations minus bequests over \$10K
IN KIND REVENUE	\$16,344 Rent provided by Cabrillo College	\$16,344 Rent provided by Cabrillo College	\$16,344 Rent provided by Cabrillo College
<b>EXPENSES</b>			
EXECUTIVE DIRECTOR 1.0 FTE	Increase 4.6% on July 1st	Increase 4.6% on July 1st	Increase 4.6% on July 1st
ACCOUNTING & HUMAN RESOURCES MANAGER 1.0 FTE	Increase 5% on July 1st	Increase 5% on July 1st	Increase 5% on July 1st
DEVELOPMENT OFFICER 1.0 FTE	Increase 5% on July 1st	Increase 5% on July 1st	Increase 5% on July 1st
OPERATIONS & COMMUNICATIONS DIRECTOR 1.0 FTE	Increase 5% on July 1st	Increase 5% on July 1st	Increase 5% on July 1st
EVENTS COORDINATOR/EXECUTIVE ASSISTANT .49FTE	Increase 5% on July 1st	Increase 5% on July 1st	Increase 5% on July 1st
ACCOUNTING & HUMAN RESOURCES SPECIALIST .49 FTE	Increase 0%	Increase 0%	Increase 0%
FOUNDATION ASSISTANT .49 FTE	Increase 5% on July 1st	Increase 5% on July 1st	Increase 5% on July 1st
ACCOUNTING ASSISTANT .49 FTE	Increase 5% on July 1st	Increase 5% on July 1st	Increase 5% on July 1st

Cabrillo College Foundation Budget  
Planning Parameters 16-17 to 19-20  
Updated 5/2/2017

Description	Projected 2017-18	Projected 2018-19	Projected 2019-20
ANNUAL FUND COORDINATOR .33 FTE	Increase 0%	Increase 0%	Increase 0%
ANNUAL FUND CALLERS	\$32,000 (34% of goal)	\$31,000 (34% of goal)	\$31,000 (34% of goal)
ANNUAL FUND CLERK .49 FTE	Increase 5% on July 1st	Increase 5% on July 1st	Increase 5% on July 1st
CLERICAL ASSISTANTS	\$0	\$0	\$0
PAYROLL TAXES	Same percentage rates as 16-17 and including Social Security @ 6.2%	Same percentage rates as 17-18 and including Social Security @ 6.2%	Same percentage rates as 18-19 and including Social Security @ 6.2%
HEALTH BENEFITS- EXECUTIVE DIRECTOR	16-17 Rates plus 2%. Reflects cost sharing.	17-18 Rates plus 2%. Reflects cost sharing.	18-19 Rates plus 2%. Reflects cost sharing.
HEALTH BENEFITS- ACCOUNTING & HUMAN RESOURCES MANAGER	16-17 Rates plus 2%. Reflects cost sharing.	17-18 Rates plus 2%. Reflects cost sharing.	18-19 Rates plus 2%. Reflects cost sharing.
HEALTH BENEFITS- DEVELOPMENT OFFICER	16-17 Rates plus 2%. Reflects cost sharing.	17-18 Rates plus 2%. Reflects cost sharing.	18-19 Rates plus 2%. Reflects cost sharing.
HEALTH BENEFITS- OPERATIONS & MARKETING DIRECTOR	16-17 Rates plus 2%. Reflects cost sharing.	17-18 Rates plus 2%. Reflects cost sharing.	18-19 Rates plus 2%. Reflects cost sharing.
HEALTH BENEFITS- RETIREE	Projected 2017-18: includes 2% increase over prior year cost and projects cost monthly taking into consideration retiree and spouse's age	Projected 2018-19: includes 2% increase over prior year cost and projects cost monthly taking into consideration retiree and spouse's age	Projected 2019-20: includes 2% increase over prior year cost and projects cost monthly taking into consideration retiree and spouse's age
WORKERS COMP	Based on 2016-17 Budget + 1%	Based on 2017-18 Budget + 1%	Based on 2018-19 Budget + 1%
LIFE AND DISABILITY INSURANCE	Based on 16-17 actual cost for each employee + 1%	Based on 2017-18 Budget + 1%	Based on 2018-19 Budget + 1%
TRAINING/CONFERENCES	Assume \$6,000; staff to attend CASE, \$4,000 other conferences and staff training	Assume \$6,000; staff to attend CASE, \$2,000 other conferences and staff training	Assume \$6,000; staff to attend CASE, \$2,000 other conferences and staff training
PAYROLL PROCESS FEES	Based on 2016-17 Projected Actual + \$300	Based on 2017-18 Budget + \$300	Based on 2018-19 Budget + \$300
RETIREMENT PLAN	Based on 6/30/15 CalPERS Actuarial: 8.418% for EJH/NAM/GW and 6.25% for KS/CB plus \$11,578 (proj. annual unfunded liability) + \$6,310 side fund pay off. First payment on side fund was 7/1/12 and final payment on side fund pay off is 6/30/21.	Based on 6/30/15 CalPERS Actuarial: 8.40% for EJH/NAM/GW and 6.25% for KS/CB plus \$15,781 (projected unfunded liability) + \$6,310 side fund pay off. First payment on side fund was 7/1/12 and final payment on side fund pay off is 6/30/21.	8.382% Projected for EJH/NAM/GW and 6.25% for KS/CB plus \$14,037 + (projected unfunded liability) \$6,310 side fund pay off. First payment on side fund was 7/1/12 and final payment on side fund pay off is 6/30/21.
RETIREE MEDICAL BENEFITS - FUTURE	\$5,686 per 15-16 actuarial. New actuarial will be prepared in June 2019.	\$5,686 per 15-16 actuarial. New actuarial will be prepared in June 2019.	\$5,686 per 15-16 actuarial. New actuarial will be prepared in June 2019.
ADVERTISING	Based on 2016-17 projected actual plus \$100	Based on 2017-18 Budget + \$100	Based on 2018-19 Budget + \$100
PRINTING	Based on 16-17 Projected Actual plus \$500	Based on 17-18 Budget plus \$500	Based on 18-19 Budget plus \$500
PHOTOS	Based on 2016-17 projected actual plus \$400	Based on 2017-18 Budget + \$400	Based on 2018-19 Budget + \$400



Cabrillo College Foundation Budget  
Planning Parameters 16-17 to 19-20  
Updated 5/2/2017

Description	Projected 2017-18	Projected 2018-19	Projected 2019-20
CONSULTANTS	Graphic Artist \$1,800; Web Designer \$35,000; CalPERS Actuarial \$1,400; \$3,775 Accounting Consultant; \$500 990 Return; \$7,500 Legal; \$500 Form 5500 Return; Proposal Writer \$6,500, Audit \$12,130, Retiree Benefits actuarial \$0	Graphic Artist \$2,000; Web Designer \$0; CalPERS Actuarial \$1,500; \$4,000 Accounting Consultant; \$600 990 Return; \$7,500 Legal; \$600 Form 5500 Return; Proposal Writer \$4,500; Audit \$12,930; Retiree Benefits actuarial \$2,500	Graphic Artist \$2,200; Web Designer \$0; CalPERS Actuarial \$1,600; \$4,096 Accounting Consultant; \$700 990 Return; \$7,680 Legal; \$700 Form 5500 Return; Proposal Writer \$2,880, Audit \$13,240; Retiree Benefits actuarial \$0
FOOD	\$300 Food for Annual Fund Callers	\$300 Food for Annual Fund Callers	\$300 Food for Annual Fund Callers
FUNDRAISING/EVENTS/PUBLIC RELATIONS	16-17 Budget plus 5%. Does not include postage or printing for invitations to events. President's endowment supplements \$2,000 for Pres. Holiday Party	18-19 Budget plus 5%. Does not include postage or printing for invitations to events. President's endowment supplements \$2,000 for Pres. Holiday Party	19-20 Budget plus 5%. Does not include postage or printing for invitations to events. President's endowment supplements \$2,000 for Pres. Holiday Party
OFFICE EQUIPMENT	Based on 2016-17 projected actual plus \$80	Based on 2017-18 Budget plus \$80	Based on 2018/19 Budget plus \$80
DEPRECIATION EXPENSE	Based on 2016-17 Budget	Based on 2016-17 Budget	Based on 2016-17 Budget
SOFTWARE MAINTENANCE	Based on 2016-17 Projected Actual + \$750	Based on 2017-18 Projected Actual + \$750	Based on 2018-19 Budget + \$750
BOOKS/PUBLICATIONS/MEMBERSHIPS	Based on 2016-17 Budget + 5%	Based on 2017-18 Budget + 5%	Based on 2018-19 Budget + 5%
OFFICE SUPPLIES	Based on 2016-17 Budget + 5%	Based on 2017-18 Budget + 5%	Based on 2018-19 Budget + 5%
POSTAGE & MAILING SERVICE	Based on 2016-17 Projected Actual + \$100	Based on 2017-18 Budget + \$100	Based on 2018-19 Budget + \$100
BOARD EXPENSES	Based on 2016-17 Budget + 5%	Based on 2017-18 Budget + 5%	Based on 2018-19 Budget + 5%
MISCELLANEOUS	Based on 2016-17 Projected Actual plus \$50	Based on 2017-18 Budget plus \$50	Based on 2018-19 Budget plus \$50
UNCOLLECTIBLE PLEDGES	\$33,250 which is 35% of Annual Fund \$95,000 goal	\$31,500 which is 35% of Annual Fund \$90,000 goal	\$31,500 which is 35% of Annual Fund \$90,000 goal
MILEAGE & PARKING	Based on 2016-17 Projected Actual plus \$50	Based on 2017-18 Budget plus \$50	Based on 2018-19 Budget plus \$50
INTERNET SERVICE	Based on 2016-17 Projected Actual plus \$30	Based on 2017-18 Budget plus \$30	Based on 2018-19 Budget plus \$30
IT HOSTING SERVICE	Based on 2016-17 Actual plus 15% (per Blackbaud)	Based on 2017-18 + 15% (per Blackbaud)	Based on 2018/19 + 15% (per Blackbaud)
BANK CHARGES	Based on 2016-17 Projected Actual plus \$500	Based on 2017-18 Budget plus \$500	Based on 2018-19 Budget plus \$500
DIRECTOR/OFFICER LIABILITY INS	2017 Actual Cost	Based on 2017-18 Actual + 4%	Based on 2017-18 Budget + 4%
LIABILITY AND PROPERTY INSURANCE	2017 Actual Cost	Based on 2017-18 Actual + 4%	Based on 2017-18 Budget + 4%
IN KIND EXPENSE	\$16,344 Rent provided by Cabrillo College	\$16,344 Rent provided by Cabrillo College	\$16,344 Rent provided by Cabrillo College
<b>Projected Surplus/Deficit before use of Reserves</b>	<b>(\$10,000)</b>	<b>(\$6,883)</b>	<b>(\$12,452)</b>

Cabrillo College Foundation  
Draft 2017-18 to 2019-20 Budget 5/2/2017

	A	I	J	K	L	M	N
1			16-17 Board Approved Budget	16-17 7 Mos. Actual and 5 Mos. Projected	17-18 Projected	18-19 Projected	19-20 Projected
2	<b>REVENUE</b>						
3	INTEREST AND DIVIDENDS	\$11,735	\$13,500	\$18,600	\$23,400	\$26,000	\$27,500
4	FEE INCOME - PROPOSAL INDIRECT	\$3,107	\$21,000	\$30,984	\$16,000	\$5,000	\$5,000
5	FEE INCOME - OTHER	\$72,124	\$72,164	\$60,914	\$64,268	\$66,795	\$67,918
6	FEE INCOME-GIFT FACILITATION	\$110,233	\$62,880	\$20,631	\$38,833	\$41,161	\$50,644
7	OPERATIONAL ENDOWMENTS PAYOUT	\$14,232	\$14,232	\$14,030	\$14,232	\$14,232	\$14,232
8	ENDOWMENT MANAGEMENT FEE	\$308,975	\$339,325	\$339,325	\$363,879	\$371,379	\$378,879
9	ANNUAL FUND	\$115,389	\$93,281	\$100,000	\$95,000	\$90,000	\$90,000
10	PRESIDENT'S CIRCLE GIFTS	\$318,639	\$318,000	\$318,000	\$321,000	\$324,000	\$327,000
11	UNRESTRICTED GIFTS	\$78,409	\$9,543	\$40,765	\$18,467	\$19,621	\$22,347
12	IN KIND REVENUE	\$16,344	\$16,344	\$16,344	\$16,344	\$16,344	\$16,344
13	<b>TOTAL REVENUE</b>	<b>\$1,049,187</b>	<b>\$960,269</b>	<b>\$959,593</b>	<b>\$971,423</b>	<b>\$974,532</b>	<b>\$999,864</b>
14							
15	<b>EXPENSES</b>						
29	TOTAL SALARIES	\$512,697	\$524,147	\$490,494	\$493,459	\$512,406	\$533,327
30	PAYROLL TAXES	\$41,828	\$41,014	\$40,589	\$41,268	\$41,907	\$43,077
31	HEALTH BENEFITS-EXECUTIVE DIRECTOR	\$23,843	\$20,668	\$25,345	\$29,657	\$30,808	\$32,168
32	HEALTH BENEFITS-ASSOCIATE DIRECTOR	\$27,862	\$28,976	\$11,986	\$0	\$0	\$0
33	HEALTH BENEFITS-ACCOUNTING & HR MANAGER	\$19,873	\$20,668	\$20,506	\$21,111	\$21,961	\$22,866
34	HEALTH BENEFITS- DEVELOPMENT OFFICER	\$27,862	\$28,976	\$20,841	\$29,657	\$30,808	\$32,168
35	HEALTH BENEFITS-OPERATIONS AND MARKETING DIRECTOR	\$0	\$0	\$19,272	\$29,657	\$30,808	\$32,168
36	HEALTH BENEFITS-RETIREE	\$0	\$0	\$7,932	\$13,881	\$14,400	\$7,800
37	PTO EXPENSE	\$1,704	\$0	\$0	\$0	\$0	\$0
38	WORKERS COMP	\$3,741	\$4,586	\$4,316	\$4,836	\$5,534	\$5,867
39	LIFE AND DISABILITY	\$3,925	\$4,346	\$3,242	\$3,405	\$3,860	\$4,120
40	TRAINING/CONFERENCES	\$3,168	\$6,000	\$6,000	\$10,000	\$8,000	\$8,000
41	PAYROLL PROCESS FEES	\$2,510	\$2,400	\$2,680	\$2,980	\$3,180	\$3,480
42	RETIREMENT PLAN	\$12,482	\$55,860	\$44,431	\$45,827	\$53,063	\$58,641
43	RETIREE MEDICAL BENEFITS-FUTURE	-\$23,784	\$12,943	\$5,686	\$5,686	\$5,686	\$5,686
44	<b>TOTAL PAYROLL TAXES AND BENEFITS</b>	<b>\$145,014</b>	<b>\$226,437</b>	<b>\$212,826</b>	<b>\$237,965</b>	<b>\$250,015</b>	<b>\$256,041</b>

Cabrillo College Foundation  
Draft 2017-18 to 2019-20 Budget 5/2/2017

	A	I	J	K	L	M	N
1			16-17 Board Approved Budget	16-17 7 Mos. Actual and 5 Mos. Projected	17-18 Projected	18-19 Projected	19-20 Projected
45	ADVERTISING	\$599	\$1,750	\$900	\$1,000	\$1,100	\$1,200
46	PRINTING	\$13,105	\$20,600	\$18,600	\$19,100	\$19,600	\$20,100
47	PHOTOS	\$2,600	\$3,400	\$3,000	\$3,400	\$3,800	\$4,200
48	CONSULTANTS	\$28,798	\$25,775	\$43,222	\$71,950	\$36,130	\$33,225
49	FOOD	\$522	\$300	\$300	\$300	\$300	\$300
50	FUNDRAISING/EVENTS/PUBLIC RELATIONS	\$45,375	\$49,964	\$47,644	\$50,026	\$52,528	\$55,154
51	OFFICE EQUIPMENT	\$1,020	\$1,100	\$1,100	\$1,180	\$1,260	\$1,340
52	DEPRECIATION EXPENSE	\$0	\$0	\$0	\$0	\$0	\$0
53	SOFTWARE MAINTENANCE	\$9,576	\$9,775	\$10,236	\$10,986	\$11,736	\$12,486
54	BOOKS/PUBLICATIONS/MEMBERSHIPS	\$1,386	\$1,430	\$1,430	\$1,501	\$1,577	\$1,655
55	OFFICE SUPPLIES	\$7,111	\$6,075	\$6,075	\$6,379	\$6,679	\$6,979
56	POSTAGE & MAILING SERVICE	\$7,821	\$15,924	\$9,924	\$10,023	\$10,123	\$10,223
57	BOARD EXPENSES	\$2,165	\$2,066	\$2,066	\$2,170	\$2,278	\$2,392
58	MISCELLANEOUS	\$359	\$300	\$400	\$450	\$500	\$550
59	UNCOLLECTIBLE PLEDGES - 35%	\$34,742	\$33,852	\$35,000	\$33,250	\$31,500	\$31,500
60	BOND CAMPAIGN EXPENSE	\$193,089	\$0	\$0	\$0	\$0	\$0
61	COLLEGE SUPPORT	\$35,000	\$0	\$0	\$0	\$0	\$0
62	MILEAGE & PARKING	\$90	\$495	\$495	\$545	\$595	\$645
63	INTERNET SERVICE	\$1,021	\$892	\$1,051	\$1,081	\$1,111	\$1,141
64	IT HOSTING SERVICE	\$4,002	\$4,002	\$4,002	\$4,602	\$5,293	\$6,087
65	BANK CHARGES	\$5,750	\$6,896	\$7,000	\$7,500	\$8,000	\$8,500
66	INVESTMENT MANAGEMENT FEES	\$0	\$0	\$49	\$0	\$0	\$0
67	DIRECTOR/OFFICER LIABILITY INS	\$4,623	\$4,104	\$4,414	\$4,327	\$4,500	\$4,725
68	LIABILITY AND PROPERTY INSURANCE	\$3,874	\$4,640	\$3,985	\$3,885	\$4,040	\$4,202
69	IN KIND EXPENSE	\$16,344	\$16,344	\$16,344	\$16,344	\$16,344	\$16,344
70	<b>TOTAL EXPENSES</b>	<b>\$1,076,683</b>	<b>\$960,269</b>	<b>\$920,557</b>	<b>\$981,423</b>	<b>\$981,415</b>	<b>\$1,012,316</b>
71							
72	<b>SURPLUS/DEFICIT</b>	<b>-\$27,496</b>	<b>\$0</b>	<b>\$39,036</b>	<b>-\$10,000</b>	<b>-\$6,883</b>	<b>-\$12,452</b>

# Cabrillo College

## Foundation

### Officers

#### President

Stephen Snodgrass

#### Vice President

Leola Lapiques

#### Secretary

William Ow

#### Chief Financial Officer

Alan Aman

#### Past President

Linda Burroughs

#### Community Representatives

Pegí Ard

Claire Biancalana

Carrie Birkhofer

Jess Brown

Owen Brown

Ceil Cirillo

Linda Downing

Lee Duffus

David Heald

Kelly Nesheim

June Padilla Ponce

Carlos Palacios

Patty Quillin

Maria Esther Rodriguez

Gun Ruder

#### College Trustee Representatives

Rachael Spencer

Gary Reece

#### College Staff Representatives

Laurel Jones

President

Victoria Lewis

VP Administrative Services

Kathleen Welch

VP Instruction

Carsbia Anderson

VP Student Services

Enrique Buelna

Faculty Representative

#### Executive Director

Eileen Hill

## MEMORANDUM

DATE: May 2, 2017

TO: Board of Directors

FROM: Eileen Hill

SUBJECT: Approve 2017-18 Fundraising Goal

The Cabrillo College Foundation staff has a fundraising goal of \$3,000,000 for outright and unbooked planned gifts for 2017-18. The following grid breaks down our goal by gift amount.

Gift Amount	
Outright Gifts and Unbooked Revocable Planned Gifts Range	Twelve-month 2016-17 Goal
Transformational Gift \$500,000+	\$500,000
Major Gifts \$25,000 to \$499,999	\$1,500,000
Gifts \$1,000 to \$24,999	\$750,000
Gifts < \$1,000	\$250,000
<b>TOTAL</b>	<b>\$3,000,000</b>

### RECOMMENDED MOTION:

Approve setting \$3,000,000 fundraising goal for outright and unbooked planned gifts for 2017-18.

6500 Soquel Drive • Aptos • CA • 95003 • 831-479-6338 • [foundation@cabrillo.edu](mailto:foundation@cabrillo.edu)  
[www.cabrillo.edu/associations/foundation](http://www.cabrillo.edu/associations/foundation)

*Please remember Cabrillo College Foundation in your will*

# Cabrillo College

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## Foundation

### Officers

#### President

Stephen Snodgrass

#### Vice President

Leola Lapidés

#### Secretary

William Ow

#### Chief Financial Officer

Alan Aman

#### Past President

Linda Burroughs

#### Community Representatives

Pegi Ard

Claire Biancalana

Carrie Birkhofer

Jess Brown

Owen Brown

Ceil Cirillo

Linda Downing

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VP Student Services

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Faculty Representative

#### Executive Director

Eileen Hill

## MEMORANDUM

DATE: May 2, 2017

TO: Board of Directors

FROM: Leola Lapidés

SUBJECT: Nominating Committee Recommendations for 2017-18

---

The Nominating Committee met on March 1, 2017 to discuss prospective Board members, officers, college representatives, and Audit Committee members. The goal was to add three to five new members to the Board. The following update shows the Committee's recommendations.

### New Board Members

- Charles Montoya
- Kate Terrell
- Amy Newell

### 2017-18 Officers

**President:** Leola Lapidés

**Vice President:** William Ow

**Treasurer:** Alan Aman

**Secretary:** Owen Brown

**Assistant Secretary:** Laurel Jones

**Assistant Treasurer:** Victoria Lewis

**Past President:** Steve Snodgrass

### College Representatives:

**President:** Laurel Jones

**Vice President, Student Services:** TBD

**Vice President, Administrative Services:** Victoria Lewis

**Vice President, Instruction:** Kathleen Welch

**Faculty:** Enrique Buelna

**Trustee:** Rachael Spencer

**Trustee:** Gary Reece

**Trustee:** Donna Ziel

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**Audit Committee Members**

- Lee Duffus, Chair
- Pegi Ard
- Carrie Birkhofer
- David Heald
- Laurel Jones
- Barbara Scherer
- Norm Schwartz
- Karen Semingson

**RECOMMENDED MOTION:**

Recommend to approve the above mentioned new Board members, officers, college representatives, and Audit Committee members.

## Recommended Prospective Board Members



**Kate Terrell** – Kate is the Senior Vice President and Chief Human Resources Officer on Driscoll's. Prior to that she held the position of vice president, Human Resources for Whirlpool's Global Products Organization and had accountability for the people strategy and execution. Previously she held the role of Sr. Director, HR Corporate and International where she had HR accountability for Finance, GIS, Legal, Communications, and HR. From 2007 – 2010 she was the global director of Human Resources for the global strategic sourcing organization. Kate has a unique background that spans over 20 years across a variety of Human Resource, Learning, Change

Management, and Consulting experiences, working in mid and large organizations to help drive effective use of the company's human capital. In addition to her work with Whirlpool, for over 15 years, Kate has been affiliated with LeaderShape Inc, a non-profit, leadership development organization who focus is to help young adults learn to live and lead with integrity. She joined their Board of Trustees in 2011. Kate received her BBA from The Ohio State University.



**Amy Newell** - Amy is a graduate of Watsonville High School, Stanford University and the London School of Economics. She spent 38 years working in the trade union movement in many parts of the U.S., including a stint as the Director of the Monterey Bay Central Labor Council after moving back to Watsonville in 1995. She retired from labor union work in 2010 and is now serving as a Director of the Pajaro Valley Water Management Agency, a docent at Seacliff State Beach, a member of the Personnel Commission for the city of Watsonville and a volunteer at the Watsonville Public Library.



**Charles Montoya**—Charles brings over twenty five years of professional management experience at Municipal, County, and State government level; including over a decade as an Officer in the United States Navy Reserve. He is the City Manager for the City of Watsonville, and prior to that served as the Town Manager for the Town of Florence, Arizona. There he demonstrated success in enhancing economic development activity in the downtown area, greatly improving the permitting process to encourage development, increasing capital project completions, and continuing to provide core services during a downturn in the economy. Prior to this, he served as the Director of Finance in the Town of Castle Rock, Colorado. He has a Masters in Public Administration from the University of New Mexico and a Bachelor of Business Administration/Management from New Mexico State University. He is a current Board Member for the Santa Cruz County Regional 911 and a Board Member for the Pajaro Valley Chamber of Commerce. Over the last

year Mr. Montoya has promoted business growth, development, expansion and retention – while balancing that with our agriculture partners, and housing needs.



# Cabrillo College

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Kathleen Welch

VP Instruction

Carsbia Anderson

VP Student Services

Enrique Buelna

Faculty Representative

#### Executive Director

Eileen Hill

## MEMORANDUM

DATE: May 2, 2017

TO: Board of Directors

FROM: Alan Aman

SUBJECT: Form 990

---

Cabrillo College Foundation Form 990 will be emailed to the Board prior to the May 9, 2017 Board meeting.

### Introduction

Form 990 provides a snapshot of the organization's purpose, staffing, sources of financial support, and use of funds. Form 990 asks whether it was furnished to the board prior to filing. It is good governance to have the board review Form 990 before submission.

### Timing

Form 990 must be submitted by May 15, 2017.

### RECOMMENDED MOTION

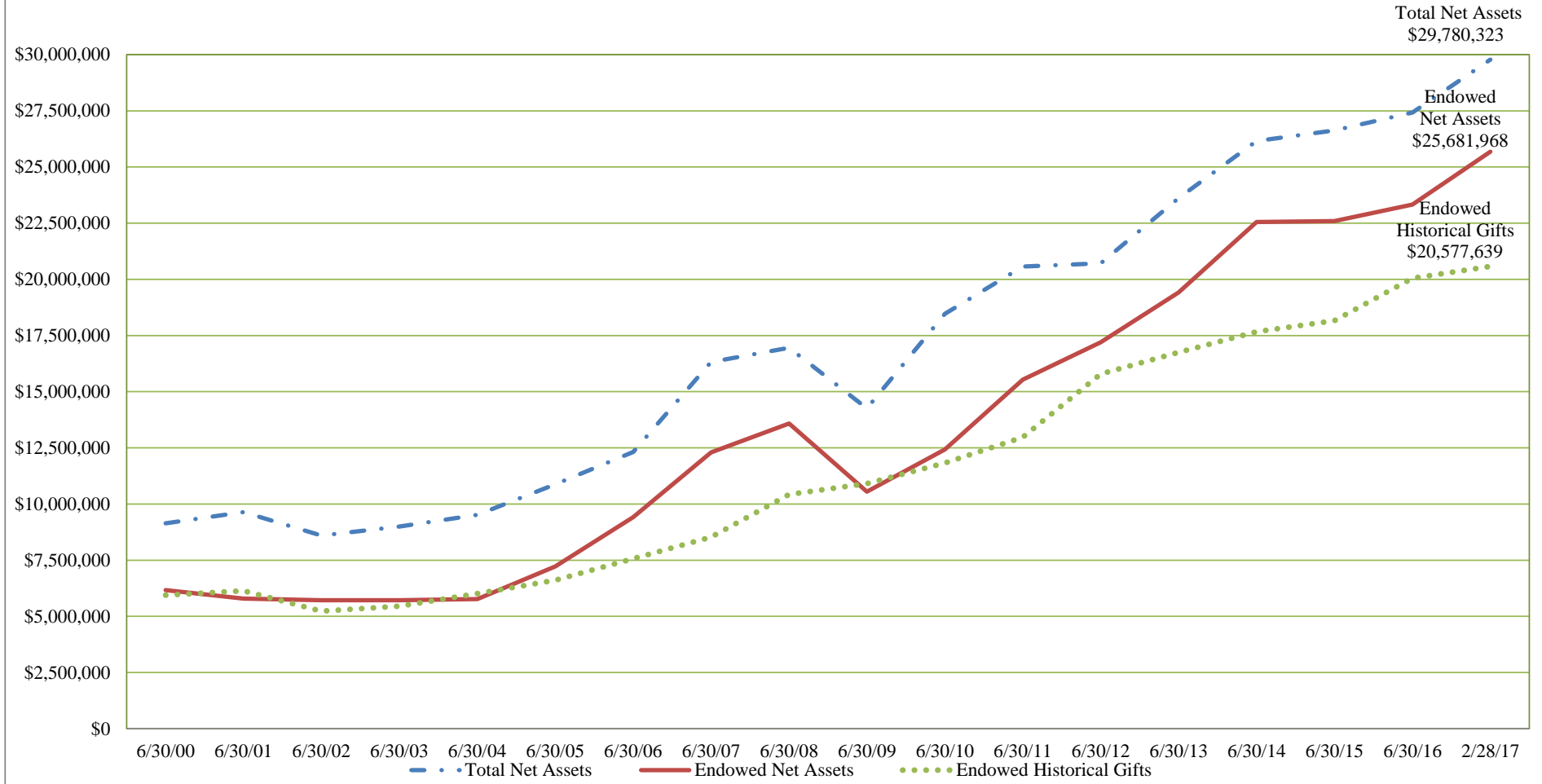
Approve the 2015 Form 990 as presented.

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[www.cabrillo.edu/associations/foundation](http://www.cabrillo.edu/associations/foundation)

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**Cabrillo College Foundation**  
**Total Net Assets, Endowed Net Assets, and Endowed Historical Gifts**  
**June 30, 2000 to February 28, 2017**



Total Net Assets highest level was \$29,780,373 as of February 28, 2017

Endowed Net Assets highest level was \$25,681,968 as of February 28, 2017

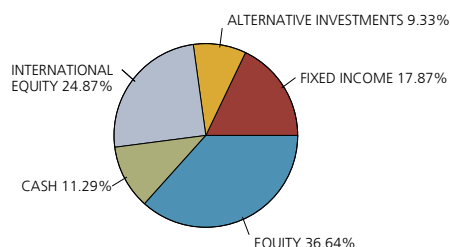
Endowed Historical Gifts highest level was \$20,577,639 as of February 28, 2017

# CABRILLO COLLEGE FOUNDATION - LONG-TERM POOL SUMMARY FOR THE PERIOD 7/1/2016 THROUGH 3/31/2017

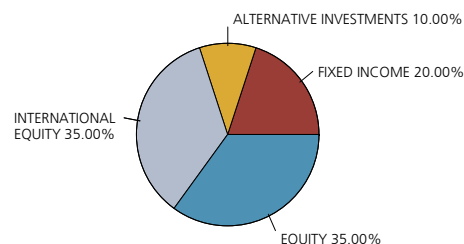


## Asset Allocation Analysis

Asset Allocation as of March 31, 2017

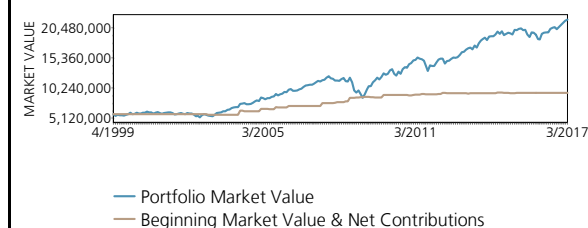


Investment Policy Preferred Target Allocation



## Portfolio Growth

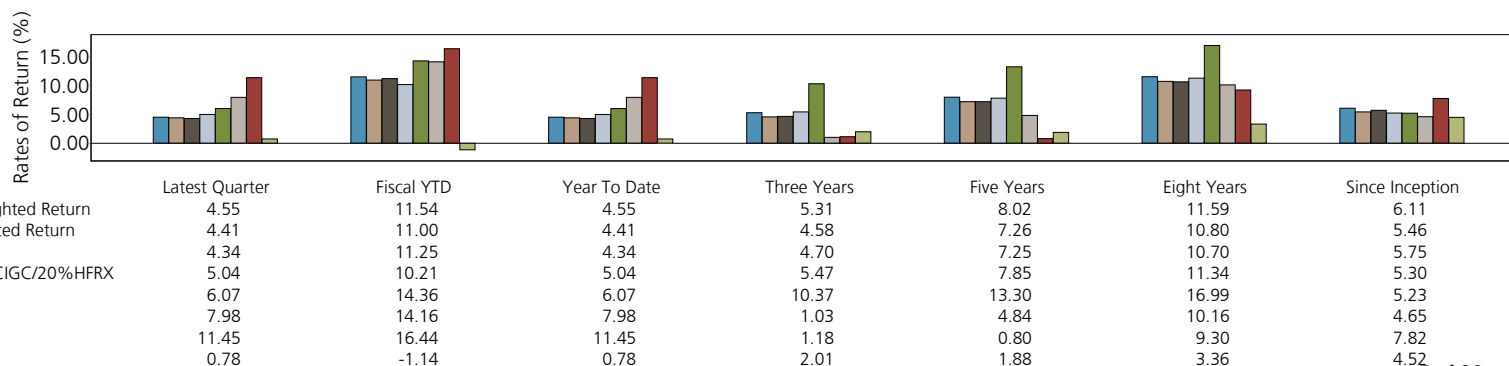
Source of Portfolio Growth  
April 30, 1999 Through March 31, 2017



	Dollars	
	Latest Quarter	Since Inception
Beginning Value	20,957,721	5,808,118
Net Contribution	94	3,570,854
Investment Return	923,305	12,502,148
Ending Value	21,881,120	21,881,120

## Portfolio Returns

Name	Incept. Date	Current Allocation	Latest Quarter	Fiscal YTD	Year To Date	Three Years	Five Years	Eight Years	Since Incep	Comparative Index	Latest Quarter	Fiscal YTD	Year To Date	Three Years	Five Years	Eight Years	Since Incep
<b>TOTAL FUND</b>																	
Parametric R3000	04/26/99	36.8%	5.73	14.95	5.73	9.57	13.04	17.00	5.93	Russell 3000	5.74	15.04	5.74	9.76	13.18	17.21	5.73
NFJ Small Cap Value	04/21/99	9.5%	0.71	20.64	0.71	8.79	11.38	14.88	10.63	Russell 2000 Value	(0.13)	24.03	(0.13)	7.62	12.54	17.19	9.69
Breckinridge Intm Fixed	05/31/06	18.0%	0.82	(1.04)	0.82	2.70	2.48	4.96	5.43	Barclays Int Gov/Cr *	0.78	(1.14)	0.78	2.20	1.92	3.47	4.19
Brandes Intl	04/30/99	9.1%	5.27	14.46	5.27	1.75	7.00	10.09	6.48	MSCI ACWI x US Value	6.82	19.15	6.82	0.05	4.39	10.01	5.33
Hansberger Intl	01/31/05	5.8%	10.04	18.00	10.04	3.05	6.11	11.36	5.89	MSCI ACWI x US Growth	9.23	9.33	9.23	1.92	5.21	10.27	5.62
Brandes Global MidCap	12/22/08	0.6%	3.20	19.27	3.20	7.66	14.20	20.27	19.06	MSCI World Index	6.53	14.05	6.53	6.12	9.99	13.96	11.80
Accuvest Intl	11/30/11	3.7%	9.04	13.58	9.04	1.22	3.83	-	4.72	MSCI ACWI x US	7.86	13.87	7.86	0.56	4.36	9.67	5.95
Intl Small Cap	10/24/16	6.9%	9.04	-	9.04	-	-	-	7.87	SP Developed ExUS SC	7.78	12.74	7.78	3.34	8.51	14.22	7.86
Liquid Alternatives	04/30/13	9.4%	2.84	5.13	2.84	2.40	-	-	1.70	HFRX Global Hedge	1.66	5.07	1.66	(0.42)	1.35	2.21	0.67
<b>TOTAL FUND</b>	<b>04/30/99</b>	<b>100.0%</b>	<b>4.55</b>	<b>11.54</b>	<b>4.55</b>	<b>5.31</b>	<b>8.02</b>	<b>11.59</b>	<b>6.11</b>	<b>Composite Benchmark</b>	<b>4.34</b>	<b>11.25</b>	<b>4.34</b>	<b>4.70</b>	<b>7.25</b>	<b>10.70</b>	<b>5.75</b>



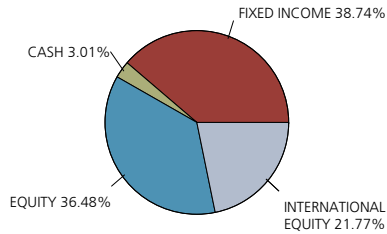
\* Strategy was transitioned from Barclays Intermediate Agg on 11/2014.

# CABRILLO COLLEGE FOUNDATION - ESG LONG-TERM POOL SUMMARY FOR THE PERIOD 7/1/2016 THROUGH 3/31/2017

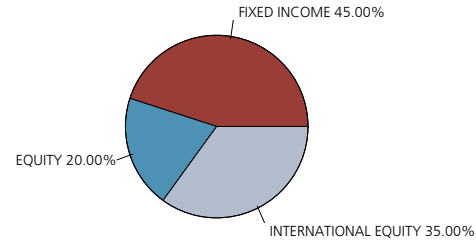


## Asset Allocation Analysis

Asset Allocation as of March 31, 2017

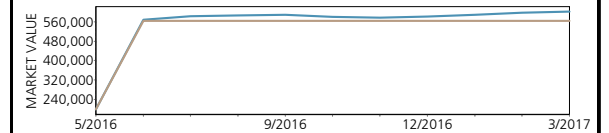


Investment Policy Preferred Target Allocation



## Portfolio Growth

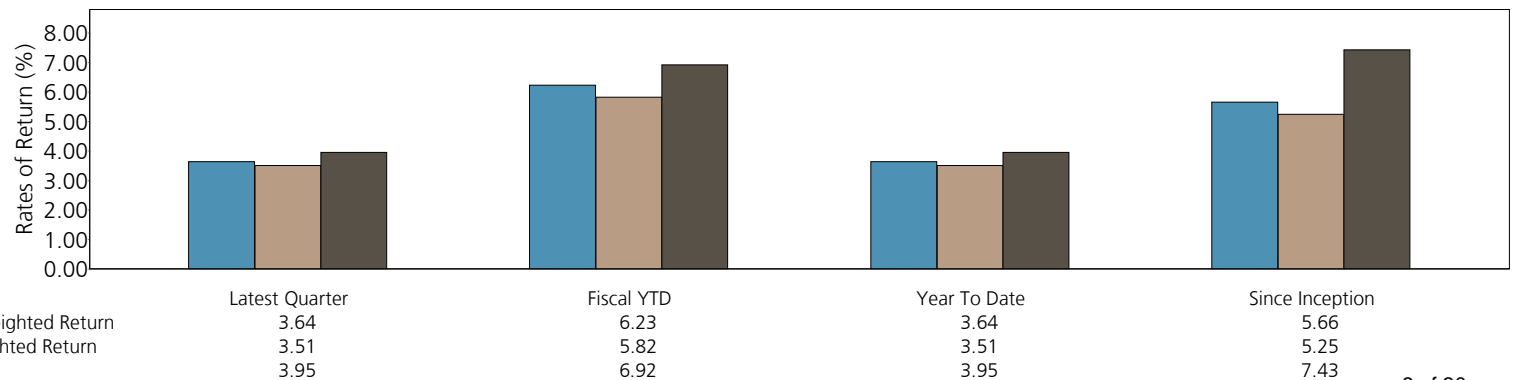
Source of Portfolio Growth  
May 18, 2016 Through March 31, 2017



— Portfolio Market Value  
— Beginning Market Value & Net Contributions

	Dollars	
	Since Inception	Since Inception
Beginning Value	198,742	198,742
Net Contribution	365,000	365,000
Investment Return	38,380	38,380
Ending Value	602,122	602,122

Name	Incept. Date	Current Allocation	Latest Quarter	Portfolio Returns			Comparative Index	Latest Quarter	Fiscal YTD	Year To Date	Since Inception
				Fiscal YTD	Year To Date	Since Inception					
TOTAL FUND											
ESG Trillium Lg Cap Core	05/19/16	21.7%	3.80	13.87	3.80	11.36	S&P 500 Index	6.07	14.36	6.07	14.66
ESG Breckinridge Intm Fixed	05/19/16	41.5%	0.76	(0.90)	0.76	0.16	BB Int Gov/Cr	0.78	(1.14)	0.78	0.27
ESG Funds	05/18/16	36.8%	6.98	10.85	6.98	9.11	MSCI ACWI ESG	6.47	12.85	6.47	12.20
TOTAL FUND	05/18/16	100.0%	3.64	6.23	3.64	5.66	Composite Benchmark	3.95	6.92	3.95	7.43



# Cabrillo College

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Faculty Representative

#### Executive Director

Eileen Hill

## MEMORANDUM

**DATE:** May 2, 2017  
**TO:** Board of Directors  
**FROM:** Claire Biancalana  
**SUBJECT:** President's Circle Campaign

---

### 2016-17 President's Circle Campaign:

Mahlon Foote and Claire Biancalana are co-chairs of the 2016-17 President's Circle Committee. Ceil Cirillo has agreed to be Co-chair for 2017-2018.

### As of May 2, 2017:

- \$331,158 has been raised, surpassing our goal of \$318,000
- 214 members have joined
- 19 are NEW members
- 93% retention rate of past PC donors

A 2016-17 member list and history report are attached.

## 2017 President's Circle Events

### President Level (\$1,000+)

- Summer Musical and Reception: *Beauty and the Beast*.....July 21
- President's Holiday Party.....December 1

### President's Plus Level (\$1,500+)

- Crawfish Boil at the home of Andrew and Marilyn Calciano.....June 22

### Director Level (\$2,500+)

- Winemaker's Dinner at the Sesnon House.....May 11

CABRILLO COLLEGE FOUNDATION  
President's Circle Members 2016-2017  
Updated 05/02/2017

\$15,000<sup>+</sup>

Patty Quillin and Reed Hastings

\$10,000<sup>+</sup>

Esther and Gerry Levandoski  
Thomas Sourisseau

\$5,000<sup>+</sup>

Claire Biancalana and William Kelsay  
Brian and Patti Herman  
Porter Sesnon Foundation  
Elio and Joy Rodoni  
Pamela Santacroce  
Stephen and Gail Snodgrass  
The Richard and Mary Solari Charitable Trust

\$2,500<sup>+</sup>

Harry and Mary Blanchard  
Owen Brown and Mary Akin  
Barbara Canfield  
John and Judy Eiskamp  
Joan Griffiths  
Trisha and Brandon Kett  
Robert Millslagle  
Bill and Karen Moncovich  
Ned and Helen Nemacheck  
Kelly and Maria Nesheim  
Amy Newell  
Brian and Michelle Sharpes  
Ginny Solari Mazzy  
Rachel Wedeen

\$1,500<sup>+</sup>

Kit Anderton  
Pegi and Tom Ard  
Jim Baker and Nancy Millslagle  
Edward and Kathleen Banks  
Carrie Birkhofer/Bay Federal Credit  
Union  
Bright Horizon Fund  
Blaine and Connie Brokaw  
John and Sydney Brokaw  
Jess and Laura Brown  
John and Linda Burroughs  
Andrew and Marilyn Calciano  
Ceil Cirillo  
Elizabeth Clifton and David Doolin

Susan Cony  
Diane Craddock and David Hogye  
Dwayne and Linda Downing  
Lee and Emily Duffus  
Roberta Dunton  
Charles and Sandra Eldridge  
James C. Emerson  
Esch Family  
Duf and Paula Fischer  
Mahlon and Joel-Ann Foote  
John and Sue Gaulty  
Hal and Dorothy Hyde  
Kent and Marie Imai  
Mary James and George Cook

Erik and Judy Johnson  
Judy Jones  
Ralph and Julie Kimball  
Vance Landis-Carey and Robert  
Carey  
Leola Lapides and Bob Katz  
Linda Larkin and Harold Widom  
Thomas Lehrer  
Karen and Charles Leigh-Wood  
Marilyn Manning Lonergan and  
Richard Lonergan  
John and Megan Martinelli/S.  
Martinelli & Co.  
Keith and Della McKenzie

**CABRILLO COLLEGE FOUNDATION**  
**President's Circle Members 2016-2017**  
Updated 05/02/2017

Susan and Joe Mingione  
Gayle and Joseph Ortiz  
Earleen Overend and Wayne Palmer  
William and Erica Ow  
Burton and Cynthia Rees  
Maria Esther and Jose Rodriguez  
Phyllis Rosenblum

Ronald and Cynthia Sekkel  
Shadowbrook and Crow's Nest  
Restaurants  
Greg and Robin Sirakides  
Rachael Spencer and Kevin Rooney  
Gabrielle Stocker  
James Thompson  
Madaline and Mickey Tomlinson

James and Carol Weisenstein  
Evans Whitaker and Deborah  
Bronstein  
Theo Wierdsma and Julie Hamilton  
Wierdsma  
James and Sue Wilson  
W. Todd and Corinne Wipke

**\$1,000<sup>+</sup>**

Phillip and Robin Adkins  
Michael and Toby Alexander  
Walter and Janet Alexander  
Alan and Wendy Aman  
Carlos and Jane Arcangeli  
Ann Asche/Locatelli Moving and  
Storage  
Dave Bachan  
Carolyn Baie and Howard Susman  
Chris Baker and Tina Cacace  
Brian and Maryann Barry  
William and Pat Barton  
Michele Bassi/Lighthouse Bank  
Philip and Kathryn Bates  
Susan and Richard Beach  
Nancy Beekman  
Paul and Carol Berman  
F. William Blaisdell  
Bob and Susan Bosso  
Jim Bosso  
Sue Broadston  
Rosemary Brogan and Gary Caballero  
Mindi and Paul Broughton  
Alan and Gweneth Brown  
Priscilla Brown  
George and Elizabeth Bunch  
Thomas Bush and Grace Sanchez  
Charles Canfield and Betty Danner  
Frederick and Kate Chen  
Sara Clarenbach  
Michael and Barbara Clark  
Joanne Clever  
Bill and Cloy Codiga  
Diane and Donald Cooley  
Margaret Cottle  
Richard and Theresa Crocker  
Bud and Martina Cummings  
Wallace Dale  
Daryl Dichek and Kenneth Smith  
Paul Dutra and Holly Liu  
Geoff and Sandy Eisenberg  
Edna Elkins  
Kristin Fabos and Rye Livingston  
Jack Farr  
Michele Finch

Finkelman Family Foundation, Herb  
Finkelman and Edda Tusinac  
Rocky and Judy Franich  
Lesley Franz  
Mary Gaukel and Les Forster  
Susana and John Glina  
Robert Goff and Eleanor Littman  
Ramon and Juana Gomez  
Nancy Gregg  
Ken Haber  
Kimberly Hallinan  
Diane and Conrad Hamako  
Richard and DeAnne Hart  
David and Jacqueline Heald  
Janet Heien  
Ken Helms  
Donald and Diana Henrichsen  
Eileen and Dave Hill  
Joseph and Bette Hirsch  
Russ and Mary Ann Hobbs  
John Hurd and Kate Kelly  
Carolyn Hyatt  
Ron Indra  
Ronald and Linda Israel  
Laurel and Richard Jones  
Ton and Thelma Jue  
Frances and Dean Kashino  
Tom and Nanette Kelsey  
Richard and Diane Klein  
George and Diane Koenig  
Agata Konopka and Flavio Cheng  
Ron Kusel and Carolyn Gong-Guy  
John Laird  
Nancy Lenox  
Norman Lezin  
Lance Linares and Laura Sutherland  
Pamela Lowry and Allen Rozelle  
Michael and Nancy Machado  
Laura Marcus and Johan Rubens  
Allen and Janet Martin  
Joseph and Lila Jean Marvin  
Dominic and Karen Massaro  
Mike and Bertie McElroy  
Mary McMillan  
Paul Meltzer  
Tom and Susana Meuldijk

Peter and Debbie Nelson  
Susan Nemitz  
George Newell  
Linda and Bruce Nicholson  
Harvey and Judy Nickelson  
Ogimachi  
Fane and Corie Opperman  
Julie Packard  
Rock Pfothhauer and Linda Wilshusen  
Peggy and Jay Poindexter  
James and Mary Ellen Poth  
Peter and Rita Prindle  
Muriel Prolo and Jack Samuelson  
Rowland and Patricia Rebele  
Kenneth and Barbara Reed  
Randy Repass and Sally-Christine  
Rodgers  
Karl and Lindsey Rice  
Nancy Rice Bradley  
Craig Rowell and Cory Ray  
Gun Ruder  
Cherri Rupert-Canfield  
Thomas and Brenda Schmida  
Carol and Kirk Schimdt  
Robert Scott  
Mark and Laurie Scurich  
Kathryn Shephard  
Robert and Helen Shepherd  
Melinda and Thomas Silverstein  
Steven and Kristin Smith  
Elaine-Maryse Solari  
Greg and Tangie Solow  
Carol and Stephen Spragens  
Bruce and Barbara Swenson  
Julie Thiebaut  
James and Deborah Thoits  
Efrain Vaca Carlos and Fatima Carlos  
Vaca  
Jerry and Robynn Walters  
Susan and Nels Westman  
Geo. H. Wilson, Inc.  
Dorothy Wise  
Patricia Wolf  
Larry Wolfson and Diane Meyer-  
Wolfson  
Bjorg Yonts

**CABRILLO COLLEGE FOUNDATION**  
**President's Circle Members 2016-2017**

Updated 05/02/2017

**Founding President Robert E. Swenson's Lifetime Supporters\***

<i>Cornelia Ackley</i>	<i>Jim and Dolores</i>	Walter S. Johnson	Porter Sesnon	<i>Phyllis and Alan</i>
<i>Kate Ashcraft</i>	<i>Graefe</i>	Foundation	Foundation	<i>Simpkins</i>
Jack Baskin and Peggy	Granite Construction	<i>Eileen and Max Koppes</i>	Rowland and Pat	Mary and <i>Richard</i>
Downes Baskin	Graniterock	<i>Albert Leoni</i>	Rebele	Solari
Mark and Barbara Beck	Joan and <i>Gerald</i>	<i>Jeane and Les Ley</i>	<i>Esther Rice</i>	Rachael Spencer and
<i>Greta Bell</i>	Griffiths	<i>Josie and Bailey Little</i>	<i>Iris and J. Arthur</i>	Kevin Rooney
<i>Neva Bournier</i>	<i>Penry and Marie</i>	Fred and Linda	<i>Rodgers</i>	<i>Robert and Frances</i>
California Wellness	<i>Griffiths</i>	McPherson	Barbara Samper	<i>Swenson</i>
Foundation	Grove Foundation	<i>Louella Mehne</i>	<i>Erica Schilling</i>	Union Bank of
<i>Mary Frances</i>	The William and Flora	<i>John Morgan</i>	<i>Ben Schneider</i>	California
<i>Callantine</i>	Hewlett Foundation	<i>Elice Neubauer</i>	SD Trombetta	James and Karen
Diane and Donald	Hewlett-Packard	George Ow and Gail	Foundation	Watson
Cooley	Company	Michaelis-Ow	<i>Elinor and Keith</i>	<i>Alice Weisenberger</i>
Richard and Theresa	Harold and Dorothy	The David and Lucile	<i>Shaffer</i>	Wells Fargo
Crocker	Hyde	Packard Foundation	Paul and Pat Shirley	Foundation
Dominican Hospital	James Irvine	<i>Rena Perlino</i>	Bill and Brigid	
	Foundation		Simpkins	

**\*Donors who gave \$100,000 cumulatively during Robert E. Swenson's life (1918-2007). Deceased *donors have been recognized in italics***

**CABRILLO COLLEGE FOUNDATION  
PRESIDENT'S CIRCLE HISTORY REPORT  
Updated 5/2/2017**

	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	
<b>Committee Chair</b>	Ceil Cirillo	Jess Brown & Ted Burke	Ted Burke & Linda Burroughs	Diane Craddock & Linda Burroughs	Diane Craddock & Owen Brown	Claire Biancalana & Owen Brown	Claire Biancalana & Mahlon Foote	
<b># of Committee Members</b>	35	37	37	36	29	36	33	
<b># of Annual Members (\$1,000+ )</b>	169	176	192	190	189	206	214	
<b># of Annual Members solicited for the first time through Annual Fund (\$1,000+ )</b>	6	3	2	1	1	2	3	
<b># of New Annual Members (\$1,000+ )</b>	23	26	30	20	16	23	19	
<b># of Rejoining Annual Members (\$1,000+ )</b>	146	150	162	170	179	183	192	
<b>% of Rejoining Members</b>	88%	88%	92%	88%	94%	97%	93%	
<b># of \$15,000+</b>							1	
<b># of \$10,000+</b>	0	0	0	2	3	3	2	
<b># of \$5,000-\$9,999</b>	8	8	10	7	7	8	7	
<b># of \$2,500-\$4,999</b>	17	16	13	13	13	14	15	
<b># of \$1,500-\$2,499 (Starting 2011-2012)*</b>	n/a	37	38	45	52	54	56	
<b># of \$1,001-\$1,499 (Prior to 2011-12 included up to \$2,499)</b>	6	3	5	4	2	5		
<b># of \$1,000 Donations</b>	138	112	126	119	114	127	133	
<b># of Donors Who Gave &lt; \$1,000</b>	8	8	9	7	8	9	8	
<b># of Prospects Solicited</b>	1,137	1,168	1,085	1,063	1,011	1,045	1,041	
<b>Donations from Annual Fund</b>	\$7,500	\$3,000	\$3,500	\$1,000	\$1,000	\$1,000	\$3,000	
<b>Operational Budget Goal</b>	\$218,000	\$225,000	\$250,000	\$280,000	\$285,000	\$317,000	\$318,000	
<b>Total Funds Raised</b>	\$225,095	\$250,616	\$271,652	\$282,774	\$311,406	\$318,074	\$331,158	
<b>Percent Increase/ Decrease Over Previous Year</b>	3%	11%	8%	4%	10%	2%	4%	



# Cabrillo College

## Foundation

### MEMORANDUM

#### Officers

##### President

Stephen Snodgrass

##### Vice President

Leola Lapidés

##### Secretary

William Ow

##### Chief Financial Officer

Alan Aman

##### Past President

Linda Burroughs

##### Community Representatives

Pegi Ard

Claire Biancalana

Carrie Birkhofer

Jess Brown

Owen Brown

Ceil Cirillo

Linda Downing

Lee Duffus

David Heald

Kelly Nesheim

June Padilla Ponce

Carlos Palacios

Patty Quillin

Maria Esther Rodriguez

Gun Ruder

##### College Trustee Representatives

Rachael Spencer

Gary Reece

##### College Staff Representatives

Laurel Jones

President

Victoria Lewis

VP Administrative Services

Kathleen Welch

VP Instruction

Carsbia Anderson

VP Student Services

Enrique Buelna

Faculty Representative

##### Executive Director

Eileen Hill

DATE: May 2, 2017

TO: Board of Directors

FROM: Carrie Birkhofer

SUBJECT: Cabrillo Advancement Program (CAP) Update

The Cabrillo Advancement Program (CAP) is a scholarship and support program designed to increase the academic success of high risk, low income students and to support their preparation for attending college. CAP includes 350 participants in 12 schools throughout Santa Cruz County. CAP scholars are selected through a competitive process open to students who qualify for free or reduced lunches. Beginning with the first year of middle school and continuing through high school, CAP students receive after-school tutoring and participate in counseling and extra-curricular activities that sustain their commitment to preparing for college. Students who complete CAP receive \$2,000 in scholarships upon high school graduation for their first and second year at Cabrillo.

#### CAP Awards Ceremony

On March 7, 2017 we inducted the next class of 6<sup>th</sup> graders into the CAP program and honored the graduating high school seniors.

Jose Avila Medrano, a CAP students graduating from Cabrillo and transferring to Humboldt State University spoke at the ceremony and said, "CAP opened doors and opportunities in life for me. And it gave me the tools I needed to be successful."

#### CAP Summer Institute June 12-June 15

CAP students will participate in workshops focused on health professions, sports careers, and transportation. Students will also take the College Knowledge workshop which outlines various college options, the cost of attending college, and financial aid. Let us know If you are interested in attending the CAP Summer Institute, meeting some of our CAP students and tutors, and seeing our students in action.

#### CAP Funding

For 2016-17 a total of \$66,220 has been raised for CAP and we have reached our budget goal for the annual CAP Program and scholarship expense.

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[www.cabrillo.edu/associations/foundation](http://www.cabrillo.edu/associations/foundation)



# Cabrillo College

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## Foundation

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VP Administrative Services

Kathleen Welch

VP Instruction

Carsbia Anderson

VP Student Services

Enrique Buelna

Faculty Representative

#### Executive Director

Eileen Hill

## MEMORANDUM

**DATE:** May 2, 2017

**TO:** Board of Directors

**FROM:** Leola Lapidés

**SUBJECT:** 2017 Women's Educational Success (WES)

Mary Anne Carson and Caroyln Mecozzi are co-chairs for the 2017 WES Campaign. Four NEW members have also joined the Committee:

- Cathy Conway
- Janet Krassow
- Amy Newell
- Donna Ziel

The first WES Committee meeting is coming up on May 12. We plan to send out our annual appeal to past donors and prospects at the end of July.

The WES Luncheon is scheduled for September 15, 2017 and, thanks to our wonderful co-chairs, Mary Anne and Caroyln, we have already raised \$15,500 toward our goal of \$21,000 to cover luncheon expenses.

This year a total of \$68,000 will be given out to women in need at Cabrillo through the WES program—the most WES has ever awarded.

# Cabrillo College

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## Foundation

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#### Secretary

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Patty Quillin

Maria Esther Rodriguez

Gun Ruder

#### College Trustee Representatives

Rachael Spencer

Gary Reece

#### College Staff Representatives

Laurel Jones

President

Victoria Lewis

VP Administrative Services

Kathleen Welch

VP Instruction

Carsbia Anderson

VP Student Services

Enrique Buelna

Faculty Representative

#### Executive Director

Eileen Hill

## MEMORANDUM

**DATE:** May 2, 2017

**TO:** Board of Directors

**FROM:** Rachael Spencer

**SUBJECT:** Scholarship Program

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While Cabrillo is affordable, rising textbook prices and the high cost of living in Santa Cruz County continue to be huge financial obstacles for our students. Scholarships help alleviate some of these burdens, helping our students reach their educational goals.

There were **1,117** scholarships awarded this year and a total of **\$870,764** was distributed to our deserving students. Scholarship awards range from \$100 - \$10,000.

- 353 General Scholarships, totaling \$167,088
- 309 Department Scholarships, totaling \$211,776
- 300 High School Scholarships, totaling \$224,500
- 31 Organizational Scholarships, totaling \$170,900
- 124 CAP and Foster Youth Scholarships, totaling \$96,500

We've had a successful year in terms of scholarship fundraising. To date, we've raised:

- Endowed Funds: \$284,832
- Nonendowed Funds: \$320,050

We've also established new scholarship funds with various donors:

- Capt. John Orlando Memorial Endowed Scholarship
  - Fire Technology students eligible
- Bob and Sharon Bailey Endowed Scholarship
  - Honors program students eligible
- Jon M. Rumble Memorial Endowed Scholarship
  - Veterans studying Construction Energy Management eligible
- Karen Waldvogel Family Endowed Scholarship
  - Special Education students eligible
- Honors Program Scholarship
- Mentors Program Scholarship

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[www.cabrillo.edu/associations/foundation](http://www.cabrillo.edu/associations/foundation)

# 2016-17 Cabrillo College Foundation Committee Meetings and Events

Updated 4/26/2017

*Committee meetings are held in the Sesnon House unless otherwise specified.*

## **BOARD OF DIRECTORS**

***Tuesdays, 12:00-2:00pm***

### **New Member Orientation**

September 13, 2016, 10:00-11:45am

(Sesnon House Room 1824)

### **Walking Tour for Full Board:**

September 13, 2016, 11:00-11:45am

### **Meetings:**

September 13, 2016

November 1, 2016

February 14, 2017

May 9, 2017 (Watsonville Center)

## **AUDIT**

***10:00-11:00am***

***Sesnon House Room 1824***

October 12, 2016 (Wednesday)

June 9, 2017

## **EXECUTIVE**

***Thursdays, 9:00-10:00am***

***Sesnon House Room 1824***

July 20, 2016

August 25, 2016

October 20, 2016

January 19, 2017

April 20, 2017

## **FINANCE & INVESTMENTS**

***Thursdays, 8:30-9:30am***

***Sesnon House Room 1824***

August 11, 2016

October 13, 2016

January 5, 2017

March 30, 2017

## **CABRILLO ADVANCEMENT**

### **PROGRAM (CAP)**

***Sesnon House Room 1824***

February 9, 2017 10:00 – 11:00

May 17, 2017 – 10:00 – 11:00

## **FACULTY GRANTS**

November 16, 2016

## **NOMINATING**

***Sesnon House Room 1824***

March 1, 2017 9:00 – 10:00 am

## **PRESIDENT'S CIRCLE**

March 29, 2017 5:30 – 7:30 pm

(Wrap-up party)

## **SCHOLARSHIP**

TBD

## **WOMEN'S EDUCATIONAL**

### **SUCCESS (WES)**

May 12, 2017 11:00 am – 12:00 pm

June 22, 2017 10:00 am – 2:00 pm

(signing party)

## **EXCLUSIVE EVENTS FOR PRESIDENT'S CIRCLE MEMBERS**

### **Lunch with Laurel**

***\$5,000+ Members***

March 2, 2017

12:00 – 1:30 pm

### **Sandy Lydon Historical Tour**

***\$1,000+ Members***

April 1, 2017

### **Feasting with Faculty**

***\$10,000+ Members***

April 18, 2017

5:30 – 8:30 pm

### **Winemakers Dinner**

***Pino Alto, Sesnon House***

***\$2,500+ Members***

May 11, 2017

6:00 – 9:00 pm

### **Crawfish Boil at the home of Andrew & Marilyn Calciano**

***\$1,500+ Members***

June 22, 2017

5:30 – 8:30 pm

## **EVENT DATES**

### **Samper 4<sup>th</sup> Grade Experience**

March 3, 2017

### **Cabrillo Advancement Program**

#### **(CAP) Ceremony**

March 7, 2017

6:00-8:00 pm

Crocker Theater

### **Community Forum**

March 27, 2017

8:00-9:30 am

Sesnon House

### **High Achiever Scholarship**

#### **Ceremony**

May 4, 2017

3:00 - 5:00pm

Sesnon House

### **American Dream Scholarship**

#### **Ceremony**

June 1, 2017

4:00-5:00 pm

Samper Recital Hall

~~Cancelled meeting/event~~

## CCF BOARD OF DIRECTORS

Alan Aman, CFO  
 Carsbia Anderson, Jr., CC VP  
 Student Services  
 Pegi Ard  
 Claire Biancalana  
 Carrie Birkhofer  
 Jess Brown  
 Owen Brown  
 Enrique Buelna, Faculty  
 Representative  
 Linda Burroughs, Past President  
 Ceil Cirillo  
 Linda Downing  
 Lee Duffus  
 David Heald  
 Laurel Jones, Asst. Secretary,  
 CC President  
 Leola Lapides, Vice President  
 Victoria Lewis, VP Admin.  
 Services, Asst. Treasurer  
 Kelly Nesheim  
 William Ow, Secretary  
 Carlos Palacios  
 June Padilla Ponce  
 Patty Quillin  
 Gary Reece, College Trustee  
 Maria Esther Rodriguez  
 Gun Ruder  
 Stephen Snodgrass, President  
 Rachael Spencer, College  
 Trustee  
 Kathleen Welch, VP of  
 Instruction

## AUDIT

*Chair:* Lee Duffus  
 Pegi Ard  
 Carrie Birkhofer  
 David Heald  
 Laurel Jones  
 Barbara Scherer  
 Norm Schwartz  
 Karen Semingson  
*Staff:* Eileen Hill  
 Nancy Machado

## EXECUTIVE

Alan Aman, CFO  
 Pegi Ard  
 Claire Biancalana  
 Jess Brown  
 Owen Brown  
 Linda Burroughs, Past President  
 David Heald  
 Laurel Jones, CC President  
 Leola Lapides, Vice President  
 William Ow, Secretary  
 Steve Snodgrass, President  
 Rachael Spencer  
*Staff:* Eileen Hill  
 Nancy Machado

## FINANCE & INVESTMENTS

*CFO:* Alan Aman  
 Pegi Ard  
 Marshall Delk  
 David Heald  
 Laurel Jones, CC President  
 Michael W. Machado  
 Carlos Palacios  
 Gun Ruder  
 Bob Shepherd  
 Steve Snodgrass, President  
*Staff:* Eileen Hill  
 Nancy Machado

## CABRILLO ADVANCEMENT PROGRAM (CAP)

*Chair:* Carrie Birkhofer  
 Enrique Buelna  
 Sesario Escoto  
 Leola Lapides  
 Rachel Mayo  
 June Padilla Ponce  
 Maria Esther Rodriguez  
 Pamela Santacrocce  
 Eva Acosta  
*College Advisors:*  
 Liz Dominguez  
 Michelle Donohue  
*Staff:* Eileen Hill

## FACULTY GRANTS

Cherie Barkey  
 Owen Brown  
 Ted Burke  
 Ceil Cirillo  
 Lee Duffus  
 Tobin Keller  
 Amy Newell  
 Patty Quillin  
 David Schwartz  
*Lead Staff:* Caitlin Bonura

## NOMINATING

*Chair:* Leola Lapides  
 Jess Brown  
 Owen Brown  
 Linda Burroughs  
 William Ow  
 Stephen Snodgrass  
*Lead Staff:* Eileen Hill

## PRESIDENT'S CIRCLE

*Co-chairs:*  
 Claire Biancalana  
 Mahlon Foote  
 Jill Adachi  
 Wayne Adachi  
 Pegi Ard  
 Jim Baker  
 Pat Barton  
 Mary Blanchard  
 Owen Brown  
 Ted Burke  
 Linda Burroughs

Ceil Cirillo  
 Kathy Cowan  
 Wally Dale  
 Linda Downing  
 Lee Duffus  
 John Eiskamp  
 Jackie Heald  
 Hal Hyde  
 Kent Imai  
 Laurel Jones  
 Keith McKenzie  
 Fred McPherson  
 Kelly Nesheim  
 William Ow  
 June Padilla Ponce  
 Pam Santacrocce  
 Bob Shepherd  
 Helen Shepherd  
 Ginny Solari Mazry  
 Rachael Spencer  
 Rachel Wedeen  
 Theo Wierdsma  
*Staff:* Caitlin Bonura

## SCHOLARSHIP

*Chair:* Rachael Spencer  
 Diane C. Craddock  
 Ofelia Garcia  
 Edda W. Tusinac  
*College Advisor:*  
 Tootie Tzimal  
*Staff:* Caitlin Bonura

## WOMEN'S EDUCATIONAL SUCCESS (WES)

*Co-chairs:*  
 Mary Anne Carson  
 Carolyn Mecozzi  
 Robin Adkins  
 Pat Alvarez  
 Pat Barton  
 Lindy Bixby  
 Rhonda Bonett  
 Sue Broadston  
 Cathy Conway  
 Mary Culley  
 Kimberley Dawn  
 Julie Hanks  
 Diana Hayden  
 Janet Krassow  
 Leola Lapides  
 Nancy Machado  
 Amy Newell  
 Mara Paladrani  
 Tonee Picard  
 Patty Quillin  
 Cathy Richards-Bradley  
 Mary Spire  
 Teresa Thomaie  
 Karri White  
 Donna Ziel

## *WES Advisors:*

Marcy Alancraig  
 Jenna Becker  
 Rosemary Brogan  
 Sue Bruckner  
 Lori Chavez  
 Caryn Crawford  
 Olga Diaz  
 Mario Garcia  
 Ofelia Garcia  
 Irma Gil  
 Holly Goodman  
 Jay Jackson  
 Teresa Kidwiler  
 Elissa Kurk  
 Diego Navarro  
 Beth Regardz  
 Ana Rodriguez  
 Gabriela Rodriguez  
 Barbara Schultz-Perez  
 Sue Slater  
 Nancy Spangler  
 Tasha Sturm  
 Laura Thurman  
 Marilyn Zanetti

## *WES Emeriti:*

Peggy Downes Baskin  
 Rachael Spencer  
*Staff:* Caitlin Bonura

# 2017-18 Cabrillo College Foundation Committee Meetings and Events

Updated 4/26/2017

*Committee meetings are held in the Sesnon House unless otherwise specified.*

## **BOARD OF DIRECTORS**

***Tuesdays, 12:00-2:00pm***

### **New Member Orientation**

September 12, 2017, 10:00-11:45am  
(Sesnon House Room 1824)

### **Walking Tour for Full Board:**

September 12, 2017, 11:00-11:45am

### **Meetings:**

September 12, 2017  
November 14, 2017  
February 13, 2018  
May 8, 2018

## **AUDIT**

***10:00-11:00am***

***Sesnon House Room 1824***

October 13, 2017  
June 8, 2018

## **EXECUTIVE**

***Thursdays, 9:00-10:00am***

***Sesnon House Room 1824***

August 24, 2017  
October 26, 2017  
January 18, 2018  
April 19, 2018

## **FINANCE & INVESTMENTS**

***Thursdays, 8:30-9:30am***

***Sesnon House Room 1824***

August 10, 2017  
October 5, 2017  
January 4, 2018  
March 29, 2018

## **CABRILLO ADVANCEMENT PROGRAM (CAP)**

***Sesnon House Room 1824***

## **FACULTY GRANTS**

## **NOMINATING**

***Sesnon House Room 1824***

## **PRESIDENT'S CIRCLE**

## **SCHOLARSHIP**

## **WOMEN'S EDUCATIONAL SUCCESS (WES)**

## **EXCLUSIVE EVENTS FOR PRESIDENT'S CIRCLE MEMBERS**

### **Cabrillo Stage Play, Beauty and the Beast, and PC Reception**

***\$1,000+ Members***

***July 21, 2017***

***5:30 pm***

***Sesnon House***

### **Lunch with Laurel**

***\$5,000 + Members***

***March 2018 TBD***

### **Sandy Lydon Historical Tour**

***\$1,000 + Members***

***April 2018 TBD***

### **Winemakers Dinner**

***Pino Alto, Sesnon House***

***\$2,500+ Members***

***May 2018 TBD***

## **EVENT DATES**

### **Women's Educational Success Lunch**

***September 15, 2017***

***11:30 am - 1:30 pm***

***Horticulture Center***

### **Heritage Club Lunch**

***2017 TBD***

***Sesnon House***

### **President's Holiday Party**

***December 1, 2017***

***5:30pm***

***Sesnon House***

### **Samper 4<sup>th</sup> Grade Experience**

***March, 2018 TBD***

### **Cabrillo Advancement Program (CAP) Ceremony**

***March, 2018 TBD***

***Crocker Theater***

### **High Achiever Scholarship Ceremony**

***April, 2018 TBD***

***Sesnon House***

### **American Dream Scholarship Ceremony**

***May/June 2018 TBD***

***Samper Recital Hall***

~~Cancelled meeting/event~~