



Fall 2024 Program Review Report | Non-Instructional Areas

Department /Area Name: Foundation For Planning Years: 2025-2026

Name of person leading this review: Dianne Knippel

Names of all participants in this review: Dianne Knippel, Emily Moulton, Samantha McConnell

Part 1. Program Overview: Briefly describe how the program contributes to the district mission

The Antelope Valley College Foundation is a nonprofit, tax-exempt 501(c)3 organization established in 1991 to receive and administer monetary and in-kind gifts from individuals, corporations and foundations, to support the college, faculty and students with scholarships, program support and faculty grants. Its mission, in partnership with its volunteer board of directors, is to increase resources, raise funds and create friends and partnerships in support of education at AVC. The Foundation collaborates with the college to support basic needs, civic engagement, careers and academic success of students enabling their effective impact and legacy on the college, local workforce, and our community.

Part 2A. Analyze the program review data for your area including equity data and any internal/external environmental scan information (e.g., surveys, interviews, focus groups, advisory groups, etc.)

Use the following questions to guide your analysis:
• Who do you primarily serve and what services do you provide for each of the groups?
• How is the work of your area measured or quantified? What is your measure of success?
• How do the demographics served by your area’s work compare to AVC’s service area demographics?
• Which race/ethnicity groups experience the largest equity gaps?
• What are the success and retention rates (S&R) for your area (if applicable)? Did they decrease or increase in the last year?

The Foundation serves students with scholarships, faculty with annual grants, and the District with support for non-budgeted needs and community engagement. For the FY 24-25 year \$280,520 was provide for 298 scholarships for 157 students – the highest given ever. Awarded students mirror the demographics of the college as reported through IERP data. 85 community, faculty and staff review scholarships to determine awards.

The Foundation’s measure of success is meeting or exceeding the goals approved by the Foundation Board of Directors and District. As of the end of FY 23/24 – all goals were exceeded and align with District goals focused on the SERVES model.

One employee was reclassified to a new job description, a new administrative assistant was hired in February and the other employee has been on temporary assignment to IT since May for growth opportunity. This position will be recruited as the employee accepted a position within IT in November.

Part 2B. Based on Part 2A and the reflection questions below, identify the program/area Strengths, Opportunities, Aspirations & Risks:

Use the following questions to guide your analysis:
• Who do you primarily serve and what services do you provide for each of the groups?

- Describe how your program/area incorporates constituent feedback.
- How does your program address equity gaps within the scope of work?

**Strengths and Accomplishments:** *(Include your data analysis of relevant metrics in your response.)*

*Consider the following questions:*

- To support equity gaps, we provide resources (i.e., scholarships) and Basic Needs funding through the annual Giving Tuesday November campaign to support students in need. Our annual grant program (funded from the proceeds the annual Wine Walk) in 2024 is providing new tools and resources for the Arts and STEM to support emerging technologies and tools for student learning and access. We have provided \$131,800 for multiple STEM and Arts grants. Monies are to be used by March 2025. The largest ever provided.
- Strengths are that the Foundation and its governing board have focused on endowment growth beginning in 2015 resulting in year over year growth to increase scholarships, faculty grants, program support and student basic needs. Total revenue has grown from \$4.3M in 2015 to \$12M in 2024. The average donor gift increased 5% (\$2,455) with 6,358 donors – a 2% increase. Held the seventh annual Wine Walk fundraiser in April 2024 to support the AV Students’ Community programmatic endowment which provides the money for the annual faculty grants resulting in a net of \$33,000 with over 250 attendees. Since 2015, this fund has provided \$262,800 for faculty projects in 2024. The annual Giving Tuesday campaign in 2023 raised \$22,000 to support student basic needs including the Pantry. The required compilation of the annual schedule of commensurate return shows that the college is receiving more than the required return on its investment in providing salaries and facilities to the Foundation. There have been no audit findings since FY 2015.

**Opportunities and Challenges:** *(Include your data analysis of relevant metrics in your response.)*

*Consider the following questions:*

Grow the volunteer Foundation Board with 3 new members and continue to perform to established goals. Challenges are the fluctuations in the economic market as a result of pandemic fallout and inflation affecting overall growth of the total Foundation revenue and the changing donor demographic. From various Foundation industry publications and case studies and general nation-wide trend research: donors are using more donor advised funds which provide pooling of funds driving less personal donor connection; continued rise of social media fundraising driving competition for funds – everyone is fundraising; changing donor demographics with more of a focus on volunteerism than donating with young adults. In the Antelope Valley, there are many fundraising organizations vying for the same donors/resources.

- Identify 2-3 challenges within your department and explain why these challenges pose a risk to the institution. These challenges can be systems, functions or programs involving financial/business processes, information technology, policies, program administration, compliance issues, etc. What is the likelihood they will pose a disruption to your program/processes with 1 being unlikely and 5 being highly likely?

Challenge	Likelihood (1 being unlikely and 5 being highly likely)
Potential for 2 skilled, experienced staff members to seek growth opportunities within AVC. While this is good for the employees, the job functions (such as accounting, endowment reporting, grant writing and campaigns) are not easily replaced and will require extensive training affecting the Executive Directors’ time away from fundraising.	5


**Aspirations:** (Include your data analysis of relevant metrics in your response.)

To be the model non-profit Foundation in the AV and a be a resource for other Community College Foundations.  
 Increase faculty grant applications by 10%.  
 Increase employee/faculty payroll donations from 8% to 20%.  
 Continue to fund/establish 10 new and/or add-on monies to endowments with the base contribution of \$10,000.

**Part 2C. Review and comment on progress toward past Outcomes Improvement Plans**

List your past **Outcomes Improvement Plans** and progress toward meeting those plans. *If you have not completed your Outcomes Improvement Plans, please review [Operational Outcomes](#) and [Outcomes Improvement Plans](#) training in Canvas and contact the Outcomes Committee directly.*

Past Outcomes Improvement Plans	Progress Made
Do not have access and probably not application to Foundation. Foundation is goal based. See below.	

**Part 2D. Review and comment on progress towards past program review goals:**

List your past program review goals and progress towards those goals.

Goals	Progress Made
Grow Foundation revenue by 5 percent	As of FY 23/24 year end – 12% growth
Grow operating unrestricted revenue by 2 percent	As of FY 23/24 year end – 8% growth
Strengthen community involvement	Held annual community Wine Walk with \$33K raised; Provide Meet and Greet breakfast for students and donors. Ex. Dir. Appointed to multiple community organization governing boards; attended multiple community events with college participants; provided AVC and Foundation information presentations to 6 community groups.
Continued self and staff development ensure broad nation-wide non-profit trends.	All Foundation staff are up to date on required AVC training. All Foundation staff have been accepted into the AVC Leadership Academy over the last 3 years. Attended 4 webinars regarding best Foundation/non-profit practices. Meet quarterly with Foundation’s wealth manager regarding investments and trends.

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**Part 3. Based on Part 2 above, please list program/area goals:**

Program /Area Goal #	Goal Supports which:				ESP Goal Primarily Supported:	Goal (Student-focused)	Steps to be taken to achieve the goal?	Measure of Success (How would you know you've achieved your goal?)
	ILO	PLO**	SLO**	OO (Service area Outcomes)				
#1	ILO 3. Community /Global Consciousness			X	Goal #6 Success: Boost success rates by prioritizing the student experience.	Grow Foundation revenue by 5%.	Continued focus on endowment growth and fundraising activities to provide scholarships and faculty grants.	Number of students who receive scholarships and number of grants to support faculty for student success. End of year financials.
#2	ILO 3. Community /Global Consciousness			X	Goal #6 Success: Boost success rates by prioritizing the student experience.	Grow operating unrestricted revenue by 2 percent.	Provides monetary support for training, Foundation Board member initiatives. Maintain current reduced operating expenses.	End of year financials and initiatives supported.
#3	ILO 3. Community /Global Consciousness			X	Goal #4 Vision: Being more future-thinking, agile, innovative, and proactive.	Strengthen community involvement through Foundation events/activities to achieve increased restricted funding.	Execute the annual Wine Walk, fundraiser and the Meet and Greet Scholarship breakfast.  Executive Director to continue engagement with community organizations.	Wine Walk revenue and attendance and sponsorships for the Meet and Greet.  Community engagement to bring in new Foundation Board members and CTE opportunities.
#4	Choose ILO				Choose an item.			

\*\*If applicable for instructional areas

**Part 4: Resource Requests that Support Program Goals (Based on the above analysis, please use the following space to document resource requests)**

Type of Resource Request	Summary of Request	Which of your Program/area goals (Part 3) does this request support?	New or Repeat Request	Amount of Request, (\$)	One-Time or Recurring Cost, (\$)	Contact's Name
Choose an item.	None.		Choose an item.		Choose an item.	
Choose an item.			Choose an item.		Choose an item.	
Choose an item.			Choose an item.		Choose an item.	
Choose an item.			Choose an item.		Choose an item.	
Choose an item.			Choose an item.		Choose an item.	

**Part 5: Insert your Program Review Data here and any other supporting data. (See Part 2A above).**

Required:

- Supporting data/information. The Foundation's end of FY Statement of Financial Position is provided in a separate file to be attached to this program review.

**AVC Foundation**  
**Statement of Financial Position**  
As of June 30, 2024

	<u>Jun 30, 24</u>	<u>Jun 30, 23</u>	<u>% Change</u>	<u>% of Column</u>
<b>ASSETS</b>				
<b>Current Assets</b>				
<b>Checking/Savings</b>				
1008 · Citizens Business Bank	205,142.78	159,669.07	28.5%	1.8%
1030 · Charles Schwab- Investment	7,223,818.60	6,077,888.55	18.9%	62.4%
1031 · Charles Schwab -Title V	3,441,307.32	2,978,520.07	15.5%	29.7%
1065 · FCCC-Osher Scholarship A/C	469,350.25	440,410.84	6.6%	4.1%
<b>Total Checking/Savings</b>	<u>11,339,618.95</u>	<u>9,656,488.53</u>	<u>17.4%</u>	<u>98.0%</u>
<b>Total Current Assets</b>	<u>11,339,618.95</u>	<u>9,656,488.53</u>	<u>17.4%</u>	<u>98.0%</u>
<b>Other Assets</b>				
1066 · Charitable Remainder Trust	229,173.18	237,426.16	-3.5%	2.0%
<b>Total Other Assets</b>	<u>229,173.18</u>	<u>237,426.16</u>	<u>-3.5%</u>	<u>2.0%</u>
<b>TOTAL ASSETS</b>	<b><u>11,568,792.13</u></b>	<b><u>9,893,914.69</u></b>	<b><u>16.9%</u></b>	<b><u>100.0%</u></b>
<b>LIABILITIES &amp; EQUITY</b>				
<b>Liabilities</b>				
<b>Current Liabilities</b>				
<b>Other Current Liabilities</b>				
2100 · Sales & Use Tax Payable	287.28	309.98	-7.3%	0.0%
2200 · District Reimbursement	0.00	7,430.29	-100.0%	0.0%
<b>Total Other Current Liabilities</b>	<u>287.28</u>	<u>7,740.27</u>	<u>-96.3%</u>	<u>0.0%</u>
<b>Total Current Liabilities</b>	<u>287.28</u>	<u>7,740.27</u>	<u>-96.3%</u>	<u>0.0%</u>
<b>Total Liabilities</b>	<u>287.28</u>	<u>7,740.27</u>	<u>-96.3%</u>	<u>0.0%</u>
<b>Equity</b>				
<b>CRT - Not Endowed</b>	229,173.18	237,426.16	-3.5%	2.0%
<b>Endowments - Net Assets W/O DR</b>	99,003.40	90,331.72	9.6%	0.9%
<b>Endowments - Net Assets With DR</b>	8,526,032.40	7,488,288.58	13.9%	73.7%
<b>Other Funds-Net Assets W/O DR</b>	1,092,234.65	841,451.36	29.8%	9.4%
<b>Other Funds-Net Assets With DR</b>	161,086.25	94,101.06	71.2%	1.4%
<b>Programs - Net Assets With DR</b>	637,637.97	510,901.14	24.8%	5.5%
<b>Scholarships-Net Assets With DR</b>	385,849.52	334,420.15	15.4%	3.3%
<b>Scholarships Osher - NAWDR</b>	8,175.00	6,725.00	21.6%	0.1%
<b>Unrestricted Funds - NAWODR</b>	429,312.48	282,529.25	52.0%	3.7%
<b>Total Equity</b>	<u>11,568,504.85</u>	<u>9,886,174.42</u>	<u>17.0%</u>	<u>100.0%</u>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b><u>11,568,792.13</u></b>	<b><u>9,893,914.69</u></b>	<b><u>16.9%</u></b>	<b><u>100.0%</u></b>