The Magellan Group

CCC Foundation Assessment Review Process

The Magellan Group will provide you with a written document that assesses your current and near term ability to raise funds. The document will provide our analysis of your foundation's potential based on our review of your information compared with information from other community colleges in California. Our knowledge of other community colleges is based on comparison studies conducted by Dr. Donald Rickner, two statewide surveys, our experience as leaders and practitioners in the state, and on baseline data on fundraising from authorities in the field. To arrive at our assessment we will review your foundation board, college leadership, foundation staff, your foundation financials, and your foundation activities. The results of these reviews will be contained in a written summary with recommendations. The recommendations will include our judgment on your potential and barriers to raising substantially more funds in the next one to three years.

I. Board of Directors

A. We will use an 80 question questionnaire to determine the current status of your Foundation Board through interviews with the College President, Foundation Board President, Foundation Executive Director, and other College and Foundation staff and members. The questionnaire will probe the following, and more:

1. Number of highly committed, well positioned board members
2. Extent of person-to-person fund raising by board members
3. Degree of financial commitment of board members
4. Clarity of understanding of the fiduciary responsibilities of board members.
5. Cohesion and social interaction of board members with each other and key constituencies of the community
6. Review all committees, standing and ad hoc
B. Review Foundation Board documents
   1. Review the District/Foundation Master Agreement
   2. Review foundation bylaws, policies and procedures
   3. Review minutes of meetings and retreats, 1 year

II. Financial Information

A. Review revenue/expense statements and budgets for the past 3 years

B. Compare typical year’s expense budget with actual

C. Compare income to expense ratios to those of similar California community college foundations

D. Interview the executive director and foundation board president along with documents to survey income categories for past several years
   1. Examine unrestricted income
   2. Review unusual categories or gifts
   3. Analyze event income
   4. Review investment income

III. Organizational Structure, by documents and interviews with college president and foundation executive director.

A. Personnel
   1. Review job descriptions for suitability
   2. Compare these and salary of each to similar California community college foundations
   3. Review responsibilities and lines of authority for appropriateness

B. Planning, policies and procedures, documents and interviews
   1. Review vision/mission Statement(s)
   2. Review Strategic Plans, both long term and short term
   3. Review data base, including software, sample records, and data base management process

We will need one hour interviews with the Executive Director, and the college president and one-half hour with all others. Separate interviews requested.

Copies of the requested documents, plus a copy of a completed NCCCF survey may be mailed to The Magellan Group at 25436 Nellie Gail Road, Laguna Hills, CA 92653, in advance of the interviews.

Please e-mail Dr. Rickner at donrickner@cox.net or call (949) 338-9229.
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"We make a world of difference in your foundation."