Saddleback College Foundation

Year in Review
2008-2009

Presentation to the Board of Trustees
July 21, 2009

Gary Capata, President
Michelle Anstadt, Director
Accomplishments 2008-2009

$300,000 for Student Scholarships and Awards
Accomplishments 2008-2009

$138,000 for Osher Endowment

The Osher Foundation challenge

- Increase student scholarship support in perpetuity at 104 community colleges
- Colleges to share in the gift according to student population
Accomplishments 2008-2009

$170,000 for Veterans Memorial

Lt Colonel R. Stewart Navarre
retired Chief of Staff
Camp Pendleton
Accomplishments 2008-2009

$5,000 for Emergency Book Loan Program
Accomplishments 2008-2009

$100,000 for College Grants
Accomplishments 2008-2009

Board Organization

- College Foundation Committee
- Advisory Board
- New Officers
- New Board Members
- Board Retreat
Raised $1,337,600

- $300,000  Student Scholarships and Awards
- $138,000  Osher Endowment
- $170,000  Veterans Memorial
- $ 70,000  Foundation Gala
- $ 58,200  Apple “A Peel” Employee Campaign
- $165,000  In-kind Community Support
- $100,000  Planned Giving
- $ 20,000  Gift Annuity
- $316,454  Campus Organizations
# Financial Update 2008-2009

<table>
<thead>
<tr>
<th></th>
<th>6/30/08</th>
<th>5/31/09</th>
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<tbody>
<tr>
<td>Endowment</td>
<td>$655,606</td>
<td>$749,809</td>
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<tr>
<td>Scholarship</td>
<td>203,326</td>
<td>209,307</td>
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<tr>
<td>Campus Organizations</td>
<td>1,615,565</td>
<td>1,546,196</td>
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<tr>
<td>Operations</td>
<td>394,716</td>
<td>8,641</td>
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<tr>
<td>Reserve</td>
<td>116,000</td>
<td>116,000</td>
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<td><strong>Total Account Balance</strong></td>
<td><strong>$2,569,382</strong></td>
<td><strong>$2,630,309</strong></td>
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Goals 2009-2010

- $300,000 for Student Scholarships and Awards
- $260,000 for Osher Endowment
- $70,000 for Veterans Memorial
- Expand Board of Governors
- Increase Community Awareness and Partnerships
- Expand Alumni Program
Thank you!

On behalf of the Saddleback College Foundation, thank you Board of Trustees for your continued support!
David A. Robinson, Esq.
2009-10 Chairman
Irvine Valley College Foundation
### Financial Status (Jan. to Dec. 2008)

<table>
<thead>
<tr>
<th>Account Type</th>
<th>Balance</th>
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<tbody>
<tr>
<td>Endowments</td>
<td>$ 544,505</td>
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<tr>
<td>Trust Accounts</td>
<td>2,327</td>
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<tr>
<td>Restricted Accounts</td>
<td>309,947</td>
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<td>Operational Account</td>
<td>114,036</td>
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<tr>
<td>Scholarship Accounts</td>
<td>57,727</td>
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<td><strong>Total</strong></td>
<td><strong>$ 1,028,542</strong></td>
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**Contributions to College**

<table>
<thead>
<tr>
<th>Type</th>
<th>Amount</th>
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<tr>
<td>Scholarships</td>
<td>$ 182,331</td>
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<tr>
<td>In-Kind</td>
<td>$ 57,848</td>
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Astounding Inventions
January 31, 2009

• 22nd annual event raised nearly $30,000
• Hundreds of young inventors attended
• $8,400 in cash prizes awarded
• Two grand prize winners each won $10,000 in pro bono legal work to have their inventions patented
• Major sponsors: Greenberg Traurig, Rosemount Analytical, Enterprise Counsel Group, AT&T, Cox Communications, Irvine Ranch Water District, SRS Labs, Wells Fargo...
21st annual event raised more than $43,000

$6,300 immediately went toward scholarships

Special guest: KNBC-4 News reporter Patrick Healy

Irvine mayor, city manager and police chief were all auctioned off to raise money for scholarships

Honorees: Howard Klein (Klein, O’Neill & Singh), Fawn Tanriverdi (EOPS counselor), Raymond Lee and Jeff Joy (Greenberg Traurig)
Scholarships

- More than $137,000 awarded at this year’s ceremony on May 14
- An additional $63,000 awarded during 2008-09 academic year
Osher Scholarship Matching Program

• IVC is the first community college in California to take advantage of $25 million matching funds provided by the Osher Foundation!

• $89,500 raised/invested to date

• After 50% match, a total of $134,250 in new endowments will provide annual scholarships, in perpetuity, to assist low-income students
Two Longtime Employees Establish An Endowment
May 5, 2009

• Steve and Joanie Woodard established a $7,000 scholarship endowment in loving memory of their family

• Joanie, who is Steve’s mother, worked at IVC for many years and is now retired

• Steve has worked at IVC’s facilities and maintenance department for the past 17 years
$21,000 Gift from Charter 100
October 6, 2008

- $21,000 gift from Charter 100

- To date, Charter 100 has donated over $200,000 to benefit low-income students

Charter 100 members: Cecilia Goodman, Dee Sampson and Julie Davis
Wind Symphony Receives $50,000 Anonymous Gift

- Foundation received anonymous $50,000 gift to support IVC’s Wind Symphony
- Similar donations made six years in a row
- Symphony endowment now has over $200,000

Professor Steve Rochford and President Glenn Roquemore
Other Gifts to the College

- Volunteers of Irvine Regional Hospital and Medical Center donated $10,000 in scholarships for students pursuing healthcare careers
- Saddleback Kiwanis awarded $8,000 in scholarships
- Grainger, a Fortune 500 company, made a $5,000 gift to fund scholarships for electronic technology students
- AT&T donated $9,000
Our Goals for 2009-10

- Establish a perpetual annual giving campaign
- Establish an advisory council
- Improve the quality of special events and coordinate within framework of long-term strategic plan
- Strengthen Foundation’s relationship with community groups and faculty
IRVINE VALLEY COLLEGE

IVC Foundation Chairman David A. Robinson and President Glenn Roquemore
ATEP Foundation

HISTORY
Established 2005

PURPOSE
Benefit students of SOCCCD
ATEP Foundation

UPDATE

New directors and officers elected July 15

Setting goals and direction

Increase activity as ATEP grows

Account balance: $10,269