



Fullerton College

## Friends of Fullerton College FOUNDATION

### Building Sustainable Funding

**Endowment Building**- By adding a percentage of our annual surplus, transition funds, and naming rights funds we will raise this year from dedicating the 200 building in honor of alumnus Cruz Reynoso (The first Latinx Supreme Court Justice in California) , we can restore the endowment completely in three years and grow it to around \$7M with new gifts. We are at \$3M now. This would put us in the top echelon of US community college foundations.

**Grants**- With our STEM-related Classroom-to-Jobsite Pipeline (C2J), we have been awarded over \$775,000 and will build on that with plans to double that program overtime including more trades. That program is designed to sustain itself with social enterprise fees.

**Social Enterprise Fees**- The C2J program above will also provide a line of social enterprise giving back 30% of new apprenticeships to our program and making it self-sustainable; 15% will come to us for new scholarships plus microloans in the income line.

**Events**- We will continue to support events by our divisions, special interest scholarship groups, alumni, and supporters, raising more funds for endowment and pass-through scholarships.

**With the focus on endowment-building, alumni building, and our C2J program, we will reach our goals and may exceed them!**



# 2021-22 Annual Report

This report was made possible with help from:

**Dr. Monte Perez**, FC Interim President

**Gil Contreras**, FC VP of Student Services and Interim President for 2021-22

**Rodrigo Garcia**, FC Vice President, Administrative Services

**José Ramón Núñez**, FC Vice President, Instruction

**Lisa McPheron & Melissa Serrato**, FC Communications

**Zoot Velasco**, Executive Director and Producer of this report

**Kesha Shadwick**, Administrative Assistant III

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**Rebecca Guillen**, NOCCCD Graphic Designer

and The Friends of Fullerton College Foundation Board of Directors

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*“Can’t you feel a brand-new day?”*  
– Lyrics from the musical *The Wiz*

## Friends Board of Directors & Staff

### President

**Isabel Oropeza,**  
Project Manager,  
UBS Financial & Alumnus

### Vice-President

**Evangelina Rosales,**  
NOCCCD Board Member

### Treasurer

**Josh Smith,**  
Vice President, SchoolsFirst Federal Credit Union

### Past President

**Gilbert Contreras,**  
Fullerton College (FC) Vice President of Student Services  
(Interim FC President for 2021-22)

### Members at Large

**Paulette Marshall Chaffee,**  
Attorney & Staff for OC Supervisor Doug Chaffee

### Ex-Oficio Members

**Dr. Monte Perez,**  
FC Interim President

**Elaine Lipiz Gonzalez,**  
FC Vice President,  
Student Services

**José Ramón Núñez,**  
FC Vice President, Instruction

**Marwin Luminarias,**  
President of Classified Senate

**Jennifer Combs,**  
President of Faculty Senate

### Staff

**Zoot Velasco,**  
Executive Director

**Kesha Shadwick,**  
Administrative Assistant III

# A New Start

Returning from COVID means THE WORLD is making a new start, as are we.

The Fullerton College Foundation was founded in 1959 as an independent auxiliary to raise funds for Fullerton College (in the future referred to as “the College”).

In 2021, after several difficult years, starting with the Great Recession and ending with COVID, the Friends of Fullerton College Foundation (in the future referred to as “Friends”) took over in a full partnership with College as the successor agency for college fundraising.

Fullerton College hired Zoot Velasco as the new executive director to oversee the new foundation. Administrative Assistant, Kesha Shadwick, joined the team. All assets are in the process of being transferred to the new foundation.

**This is our first year of operation.**

**Our Mission:**  
**Helping students launch their future**

**Our Vision:**  
The creation of a clear path to transform lives and inspire positive change in the world.

*“Supporting students in their academic journey is one of the most important things we can do for the next generation. My parents always used to tell me; education is the one thing no one can ever take away from you.”*

– Board President Isabel Oropeza

# New Leadership



**Zoot Velasco**  
Executive Director

last served as Director of the Gianneschi Center for Nonprofit Research at California State University Fullerton’s College of Business & Economics. Besides running the foundation, Zoot is a professor of business & marketing at California State University Fullerton, a professor of nonprofit management & leadership at California Polytechnic Institute Pomona, host of the nationally-ranked 501(c)(3)(b)(5) podcast, and author of three books (two on nonprofit leadership.) For nine years he led the Muckenthaler Cultural Center quadrupling income, budget, endowment, and programs. He is also a registered historical scholar with the California Humanities Council, researcher, published poet and playwright, story slam champion, TEDx conference producer, Screen Actor’s Guild member, and Past-President of the Rotary Club of Fullerton.

Zoot holds a BA in dance from St. Mary’s College of California, an MBA in nonprofit management from Hope International University, and professional designations in arts education, fundraising, leadership, management, and conflict resolution.



**Isabel Oropeza**  
Friends Board President

is the Project Manager for the Women’s Segment at UBS, a role she recently took on in early 2022. She is responsible for overseeing strategic efforts to drive forward UBS’s strategy to serve women investors and address the critical topic of women’s financial wellbeing. In her previous role, Isabel was an Administrative Manager within the UBS West Coast Private Wealth Management team, which oversees fifteen locations. Isabel has been with UBS since 2013. Prior to joining the financial services industry, Isabel held positions in the professional sports industry.

Isabel, a Hornet alumna, recently graduated from the University of Southern California, Sol Price School of Public Policy with an MA in Public Administration and received a BA in Organization Communications from Pepperdine University. She holds her FINRA Series 7, 66, 9, 10. She is originally from Orange County, CA and Mexico, and currently resides in Los Angeles, CA.

# YEAR IN REVIEW

Since July 1, our first day of operation, we have served our mission by:

**\$3,012,502**

Expected endowment when restored later this year more than doubling the inherited endowment. See opposite page.

**\$901,523**

New funds raised this year. More than doubling the \$430,000 draft goals set in July 2021.

**\$775,800**

New grants secured. See page 8.

**\$92,000+**

The amount paid in scholarships awarded to over 160 students for school this fall 2022. This is more than twice what was given in 2020-21. In addition we paid over \$100,000 in back scholarships delayed by COVID.

**\$17,250**

We started a new emergency grant program and endowment. Emergency Grants were given to 35 students. Most grants were \$500 or less providing key support to keep students attending school.

## ALSO...

### Founding The Hornet Alumni Association

with 40 alumni signing up to participate. They are working on an event for fall.

### Getting the word out

with new web/social media presence and over 100 speaking engagements in the community leading to many connections that helped our growth.

## Our Endowment is Growing by Leaps & Bounds

An endowment is an investment in scholarships made at a large dollar amount over \$15,000 (historically over \$10,000), which are funded by the interest. In this way, the corpus is never touched, and the scholarships can go on perpetuity. The larger we can build our endowment, the greater we safeguard student scholarships far into the future.

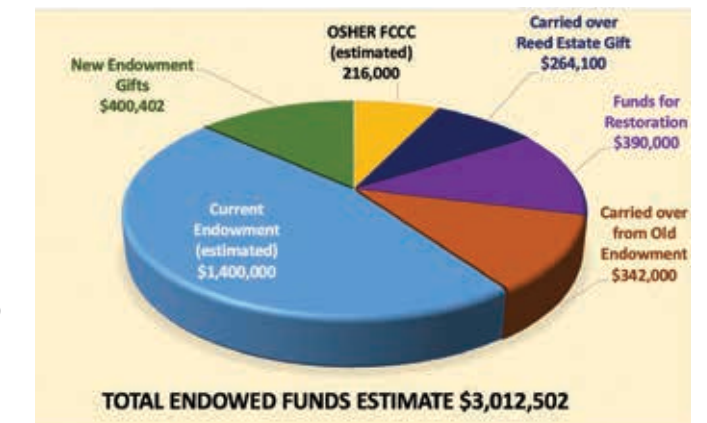
Funds from the former foundation are estimated at **\$1.4M**. These funds will transfer later this year when all the dissolution paperwork is complete with the state and federal authorities. Until it transfers, it cannot be used for scholarships. In the interim, we have calculated the percentage that would be used for scholarships and have loaned that money to ourselves from a fund given to us for the transition. The **transition funds** will also cover \$390,000 to restore historic losses from the old endowment returning most endowed scholarship funds back to 100% of their original value.

**OSHER** is a fund kept at the Foundation for California Community Colleges on our behalf. It is co-mingled with other colleges endowments, and we don't control it. They hold **\$216,000** of our endowment which is matched with other funds.

The **Thomas Reed Estate** gifted **\$264,100** for a new scholarship and contribution to the Emergency Grants Fund. This gift was made after the end of the old foundation and was stewarded to our endowment by the new foundation. We also have **\$342,000** that was transferred to us from the old foundation to go back into the endowment for restoration.

### NEW ENDOWMENT FUNDS include:

- The **Orange County Farm Bureau Scholarship Fund** for Horticulture grant, of which **\$71,500** was set aside as endowment for scholarships.
- A new **Emergency Fund Endowment** started with a **\$50,000** gift from **Bill & Pat McGarvey**. Over \$15,000 were given this year thanks to grants from **Waltmar Foundation** and **Fullerton Rotary Club**.
- **Associated Students** endowed our **Students of Distinction Scholarship** with **\$38,000**.
- The **Laila Arman Memorial Scholarship** provided by family and friends **\$25,000**.
- **Professor Emeritus Jo Ann Brannock** added **\$15,000** to her named scholarship, now at \$25,000.



# New Grant Funding (\$775,800)

- The State Chancellor’s Office awarded us, in partnership with the college, a **\$499,000** grant to create the first drone pilot apprenticeships in the country as part of our Classroom-to-Jobsite Pipeline. Special thanks to Lisa King from the District Office for her work in this grant. Award will come over next three years, not in this year’s budget.
  - We received **\$151,800** from the Orange County Farm Bureau, their largest award of the year, to create a student- apprenticeship pipeline in horticulture. \$71,500 will be an endowment for scholarships. The rest will help us develop internship and apprenticeship opportunities for horticulture students.\*
  - Orange County Community Foundation through the Henry W. & Ellen R. Warne Family Endowment Fund awarded us a **\$50,000** planning grant to create our Classroom-to-Jobsite program. This opened the door to the other funding.\*
  - Southern California Edison and Samueli Foundation each contributed \$25,000 for a total of **\$50,000** towards the Drone Pilot Program.\*
- \* See page 12
- Other awards include:**
- Waltmar Foundation: **\$14,000** for Student Scholarships (incoming freshman)
  - Beckman Foundation: **\$10,000** for Student STEM Scholarships



# Scholarship Recipients 2022

**TOTAL SCHOLARSHIPS GIVEN 2022: \$92,725**

## Special thanks to

Beckman Foundation, Orange County Community Foundation and Waltmar Foundation who combined for **\$42,000** of these scholarships.

**\$50,000** more coming this year from Southern California Edison and Samueli Foundation.

See all our Hornet Scholars listed at our website: [HornetScholars.com](http://HornetScholars.com)

## EVENTS

- **\$62,000** was raised online for Giving Tuesday at our annual appeal.
- Board member Bob Jensen led an opening night party and scholarship drive generating over **\$40,000** for Theatre Scholarships including the Bronwyn Dodson Scholarship with help from the Dodson Family.
- The Veteran’s Resource Center sponsored a Vets Golf Tournament raising **\$34,000** for Veterans Scholarships.
- The Study Abroad program hosted a small event raising **\$7,500** for their scholarships.



# President's Scholars

The President's Scholars program is common on Cal State and UC campuses. It is a program designed for students with great need who also have great potential. Scholars are picked from applications with the greatest need who also have high academics and demonstrate great leadership in their high school career. Presidential Scholars have a full scholarship to college, paid work study (so that they can work on campus and do not have to worry about a job), and complete college fulltime as a cohort. In this way, they support each other.

Here at Fullerton College, Friends is working with three pilot schools, Anaheim High School, Buena Park High School, and Fullerton Union High School, to create a similar program on our campus.

Students who show great need, academic accomplishment, and demonstrated leadership from these schools, are chosen to be Presidential Scholars. They will receive a full scholarship (paid through their financial aid), an additional scholarship to pay books and fees, paid work study on campus, and wraparound services (like counseling, free bus passes, food bank access, etc.) They will go through school full-time as a cohort for mutual support.

## The YellowJackets

Everyone knows the most amazing, highly-evolved of all Hornets are the Yellow Jackets! This year we started a new YellowJacket Society. These are investors in our students who give \$25,000 or more over their lifetime. YellowJacket members get special invites to trips and events, as well as the coveted limited edition "YellowJacket" (below) as featured recently on So You Think You Can Dance with the Throwback 80s look and logo, and their name embroidered on it. They also get a limited-edition Angels- Fullerton College co-branded hat.



# Emergency Fund

When the foundation did a recent listening tour and evaluation for our new strategic plan, we spoke with many staff and faculty members at the college and asked them what, if anything, they wanted the foundation to do differently. The number one request? Emergency grant funds.

Students have a myriad of obstacles that come up during the school year. A few hundred dollars can make the difference between dropping out and graduating. Such stumbling blocks can drastically alter their future.

- A student needs to pay bills now but financial aid won't come for a few months.
- An LGBTQA2S+ student "coming out" is banned from their home and becomes homeless.
- A student has a death in the family forcing them to go back to work. This results in them failing a class, triggering a hold on their financial aid.
- A student can't afford the final fees needed to get their certificate allowing them to work.
- A student with a rare disability needs a license for special software that the DSS Center doesn't have.

These are just some of many things that happen to students every year. Such issues don't fit neatly into a scholarship but can change a life. Some of these can just be a small microloan needed to get through the semester and will be repaid by financial aid.

Bill & Pat, the McGarvey brothers and Hornet Alumni, get it. Together they gave \$50,000 to start an emergency grants fund. That fund is now over \$180,000, meaning that each year we can give out \$6,300 for emergencies. Organizations like Waltmar Foundation and Fullerton Rotary also gave over \$15,500 in emergency grants this year.



# What do Drone Pilots and Landscape Designers have in common?



## They both are pilot programs in our new Classroom-to-Jobsite Pipeline

A student, let's call her Joan Piloto, is a graduating high school student and loves video games. She lives in a household that can't afford a fancy high-speed internet line, so she goes to the library or stays after school to play the video games she loves. Joan also has a disability. She knows it would be hard to be a pilot, a childhood dream, but she can pilot planes on her games. Her counselor gets Joan into a High School program flying drones.

She learns that Fullerton College Drone Lab is at the forefront of Drone training and technology. She will qualify for financial aid. With that aid, she can do the 11-credit program in one year and get her OSHA 30 card certifying her for workplace safety. After her \$175 FAA test, she can fly drones commercially.

The next steps would be more challenging for Joan. She will have to pay between \$1,500- \$17,000 for a commercial drone to work. Most drone pilots are contractors and required to own their drones. She will also have to pay for books and fees of about \$500 each semester. She will also have to get more flying time and meet an employer.

Experienced drone pilots are a booming new career in many fields. Non-military drone pilots now work in: Infrastructure inspection; surveying, mapping/ GIS; construction; architecture; public safety/police/ fire operations; search and rescue; journalism; film industry cinematography; photography & videography; real estate & business photography; marine biology; archeology; physical

education/athletics; agricultural crop dusting; package delivery; and drone design, construction, maintenance, and repair. According to the Economic Research Institute, California's average pay for a Drone Pilot is \$68,560 a year (\$33/hour). There are not enough seasoned drone pilots to take all the jobs coming into the field. Therefore, creating a vital apprenticeship program that pairs willing, trained students with employers needing trained pilots is an immense opportunity for all.

With our new **Classroom-to-Jobsite Pipeline (C2J)** program, Fullerton College (FC) and the Friends of Fullerton College Foundation (Friends) have received a \$500,000 grant to create the state's first Drone Pilot Apprenticeship program. The program partners with Hope Builders, a social-enterprise/ nonprofit temporary-employment agency in Santa Ana. Students like Joan will be eligible for scholarships to cover their books and fees. Once they graduate, they will pair with employers for the 600 hours needed to finish their apprentice program. Joan can hop the digital divide with a microloan of up to \$2500 to pay for her drone and FAA testing. She will be paid \$20/hour during her apprenticeship. Microloans are paid through the apprenticeships as a payroll deduction, in her care a \$2500 loan will deduct \$4.20/hour from her pay to repay her loan. By completing the apprenticeship, Joan will have finished payments and own her drone outright.

In less than two years, Joan will have her Commercial Drone Pilot's License, her OSHA 30 Card, her completed apprenticeship, and her paid-off drone. She now has three options:

- She can get her business license and continue as a contractor. Friends will help guide her in this.
- She can stay with the company after her apprenticeship or another employer in the program and be a full-time employee making more than \$33/hour.
- Or she can continue as a contractor at a much higher salary through Friends and Hope Builders.

Regardless of her choice, she is employed in a growing field with many opportunities.

For each apprenticeship, employers pay a finder's fee. Such a fee is typical for temp agencies. Much of this fee goes to Hope Builders to pay for their work as the temp agency and the apprentice's benefits and insurance. A portion goes back to Friends for providing FC students and drone employers. This funding supports future scholarships and the microloan program. This system makes the entire operation a self-sustaining social enterprise without any need for future funders.

## New Funding

This program comes to us with funds from the **State Chancellor's Office** \$499,000 grant for new apprenticeship programs with help from the **California Division of Apprenticeship Standards**. We are writing the first apprenticeship standards in the state for drone pilots now. We also have funding from the **Orange County Community Foundation**, which started the process with a \$50,000 planning grant, the **Samueli Foundation** (\$25,000), and **Southern California Edison** (\$25,000). Edison is also providing employers for the program. We are partnering with area workforce investment providers and creating dual enrollment programs at area high schools to expand the program and shorten the timeframe from classroom to jobsite.



Through a \$151,800 grant with Orange County Farm Bureau, their largest contribution this year, Landscape Designers now enter the picture. Once we have set up the program for drone pilots, we can move Horticulture students into internships and apprenticeships with the same partnership with Hope Builders in the same way. The Farm Bureau grant also provides an endowment for horticulture scholarships. Now, students who qualify for financial aid in either drone piloting or horticulture can go from student to apprentice to a high-paying job without cost.

# Friends of Fullerton College Foundation Strategic Plan 2025



## We started with a 90-Day Evaluation Report

### Purpose

The findings of this comprehensive evaluation of the Friends of Fullerton College Foundation (Friends) organization and programs provides a snapshot of where the organization is today as a starting point for a strategic planning process that will help Friends set a vision for where it will go over the next three-five years. One cannot map out where to go without knowing from where one is starting.

The evaluation provides the SWOT analysis by identifying a consensus of the organization's strengths and weaknesses; opportunities and threats. We will build on their strengths and overcome their weaknesses while taking advantage of opportunities and mitigating threats in the planning process.

## Methodology

This evaluation report was compiled from the raw data of:

1. The former foundation files, gift agreements, documentation, databases, and accounts.
2. A survey given out through NOCCCD to 38,000+ alumni, coordinated with us.
3. A Listening Tour in which we interviewed lead staff, faculty, students, alumni, funders, and district leaders.
4. Interviews of Cypress College Foundation staff, CA Community College Foundation staff, Association of Community College Foundations President, and other community college foundation leaders including templates and best practices for leadership.
5. Focus Groups within Faculty Divisions, Donors, and Alumni. Student focus groups could not be done at this time with COVID restrictions.
6. Meetings with current board members as they were available to meet. From these sources and conversations, we compiled the information into a report for the purposes of a consensus strategic plan completed in March 2022 and approved in June.

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## Listening Tour Findings

### TOP CONSENSUS

Need for Emergency Grant Money #1 with a bullet! Create an emergency grants system for our students who are often on the edge.  
One emergency stands between graduating and dropping out.

We need to repair and grow the endowment!

Students & scholarships should be a priority over other campus funding needs (which are often covered by other state funds)

Scholarships should cover non-Financial Aid Fees

Create Strategic Partnerships that help students with job placement and workforce investment as well as wrap-around services



## Other Topics that came up frequently:

Simple, consistent process for Division Scholarships

Make a system for pass-through grants

Showcase our top programs and build on them:

Drone Program

The Arts & STEAM Implications

Cyber Security

Paralegal

Cosmetology

Digital Marketing

Other Certificated Programs

Starting an Alumni Group

Would like to expand FC Street Scholars program (Returnees from incarceration)

Not enough for funding for all our DACA students

Could we do more for non-resident students and athletes?



We will take advantage of our strengths, mitigate our weaknesses, build on opportunities, and guard against threats through this plan.

## SWOT

### Strengths

- Supportive & Inclusive Environment
- Student-centered Approach
- Dual Governance (Govt/Nonprofit)
- New Leadership on all levels open for innovation

### Weaknesses

- Old Foundation Brand-Issues
- Navigating the Nonprofit, FC & NOCCCD Systems
- New Skeletal Board

### Opportunities

- Untapped Alumni
- Earned Income
- Untapped Strategic Partnerships
- Marketing/Brand Potential
- Innovative Environment w/New Leadership

### Threats

- CSUF Overshadows
- Perceptions of restructuring
- Perceptions of Biden's "Free Education"



## Goal 1. Program Goal

**Create mission-based self-sustaining programs that significantly grow the number of students we serve, the dollars we provide to serve them, and the pipeline from the classroom to the jobsite.**

### We will do this by:

**Growing the endowment** significantly in partnership with Board, and FC Leadership.

**Creating a pipeline** from scholarships to graduates to apprenticeships in CTE (Trade) classes through a strong strategic partnership alliance in a sustainable way with social enterprise.

**Creating a Presidential Scholars Cohort** in partnership with FC Faculty, staff, leaders, and investors, including scholarships, wrap-around services, work-study, and training for a small group of exceptional student-leaders.

Creating a thriving **Emergency Funds Endowment** that provides needed resources for students with emergencies on the brink of dropping out of classes, and faculty/staff for needed emergency resources.

**Growing our Alumni Network** and their relationship to the campus.

**Creating a layered investor club structure** to encourage larger gifts including the President's Circle and YellowJackets Society and investor benefits.

### Growing our relationships with the Funder community

**Encouraging support groups to create small fundraisers** across the calendar such as the VETS Golf Tournament and a new Alumni Event, rather than a single Gala event (which statistically takes more staff time and raises less net profit).

**Creating earned income streams** for sustainability

**Continually evaluating** our impact with staff, faculty, district, leadership, students, alumni, funders, and all stakeholders.

## Goal 2. Leadership Goal

**Establish a cohesive leadership team focused on/engaging with the community**

### We will do this by:

#### Community engagement

- Telling the stories of the college (Ambassadors in the Community)
- Touring guests through each area of the college

#### Developing a full board as per/our bylaws

- Pipeline to the board through committees
- Corporate Relationships with synergy
- Special skills that help us such as law, acctng, etc
- Alumni pipeline

#### Rebuilding relationships with emeritus and investors

- All divisions including arts and athletics being brought into the conversation
- Reaching disproportionately-impacted populations
- Equal representation
- Succession planning

## Goal 3. Development Goal

**Create a strong foundation for growth through rebuilding our endowment, reputation, and sustainable systems.**

### We will do this through:

- Honoring opportunities for investors
- Naming of buildings
- Endowment building
- Branding
- Social enterprise

“I’ve learned that people will forget what you said, people will forget what you did, but they will never forget how you made them feel.”

–Maya Angelou