OREGON COAST
COMMUNITY COLLEGE

OCCC FOUNDATION

CONTACT INFORMATION FOR KEY INDIVIDUALS

NAME	TITLE	WORK	CELL	HOME
Lucinda Taylor	Director of Advancement	541.867.8531	425.444.5083	See cell
Kate Halleron	Financial Analyst	541.867.8508		

CRITICAL FUNCTION OF OCCC FOUNDATION – SUMMARY

1. Raise funds to support college needs
2. Steward donated funds to ensure donor intent is honored
3. Administer Foundation programs supported by donor funds (Scholarships, lectures, etc.)

BASIC PROCESSES PERFORMED DUE TO CRITICAL FUNCTIONS

1. Raise funds to support college needs
   a. Matrix of what is needed and time frames to conduct this process

NEEDS	Time without Need(s)	How much time is needed to get by – if need is available intermittently
Access to donor records / Raiser's Edge (RE) database	1 week	3-5 hours per week
Method of communication w/donors (email, phone, USPS)	1 week	3-5 hours per week
Method to continue planning for future events	Depends on time of year	1-3 hours per week in general, more if major event is coming up

   b. Number of individuals and expertise needed to continue this process
      • One person with access to and knowledge of RE database
   c. Coping strategies
      • This function can be accomplished from any location with an internet connection. The RE database is hosted by Blackbaud on their servers and they maintain a backup.
      • If RE is unavailable, fundraising can continue with contact information available on directory websites and using Excel spreadsheets or even handwritten records until RE is available again.
2. Steward donated funds to ensure donor intent is honored
   a. Matrix of what is needed and time frames to conduct this process.

NEEDS	Time without Need(s)	How much time is needed to get by – if need is available intermittently
Access to donor records / Raiser's Edge (RE) database & financial records / Quickbooks (QB)	1 month	2-4 hours per month

   b. Number of individuals and expertise needed to continue this process
- One person with access to and knowledge of RE database
- One person with access to and knowledge of QB database

   c. Coping Strategies
- RE can be accessed from anywhere with an internet connection.
- QB data is stored on the server and is backed up regularly
- Monthly financial reports are saved on our server with regular backup and can be retrieved from email if needed
- Temporary records can be maintained using Excel or even handwritten documentation until RE and QB are available again.

3. Administer Foundation programs supported by donor funds (Scholarships, lectures, etc.)
   a. Matrix of what is needed and time frames to conduct this process

NEEDS	Time without Need(s)	How much time is needed to get by – if need is available intermittently
Access to scholarship / program documentation	1 week to 3 months, Depending on time of year	0 – 3 hours/week, Depending on time of year

   b. Number of individuals and expertise needed to continue this process
- One person with access to documentation and knowledge of scholarship process
- One person with access to and knowledge of student accounts in the College ERP

   c. Coping strategies
- All files are saved on the server with regular backups. As long as the server is functional, records can be retrieved.
- Records can be reconstructed from email if necessary.

INFORMATION TECHNOLOGY REQUIREMENTS

1. Centrally owned applications
   a. Office 365
   b.
2. Department owned IT applications and systems

Responsibility	Applications/Systems				
	Raiser's Edge	**QuickBooks**			
Functional Owner	Lucinda Taylor	Kate Halleron			
Technical Owner	Blackbaud	Lucinda Taylor			
Application Type	Fundraising database	Accounting software			
Backup — *Frequency*	Managed by Blackbaud	Nightly			
Backup — *Media*					
Backup — *Auto/Manual*		Auto			
Database application (Y/N)	Y	Y			
Does application move data to/from any core campus systems (Y/N)	N	N			
Department(s) affected by failure of App.	Foundation	Foundation			
Technical experts	Lucinda Taylor	Kate Halleron			
Responsible party for recovery	Blackbaud	Spencer Smith			
On-site storage location (if any)		Local server			
Off-site storage location & frequency (if any)		Lincoln City, nightly transfer			
Location of installation disks/documentation	Cloud based	Cloud based			
Local Workstations	Cloud based	Kate Halleron Lucinda Taylor Robin Gintner			
Other workstations					

OTHER INFORMATION

1. If unable to function
   a. If necessary, the Foundation could put activity on hold for up to three months before permanent negative impact would occur. This is assuming a major event that is well-known county-wide, thereby reducing the chance that donors would feel the Foundation was simply being unresponsive.
   b. On the other hand, if the college is impacted by a natural disaster, fundraising to aid recovery would need to begin as soon as basic survival needs are met.
2. Periods of increased activity
   a. February – May for Pearls of Wisdom event
   b. April – June for scholarship awards
   c. September – October for SEAL scholarships
3. Department/Division Operating Instructions can be found where? (backed up, hardcopy, etc?)
   a. Operating instructions are under development. All electronic files are stored on the Development drive on a server maintained and backed up by IT. Pertinent donor correspondence is scanned and saved to the Raiser's Edge database since July 2016. Prior documents currently exist in hardcopy only without backups. A project for 2017-19 is to scan relevant archival documents and add them to the donor database.