

**SOUTHWESTERN COLLEGE FOUNDATION  
MEETING AGENDA  
Tuesday, February 25, 2014 ♦ 7:30 a.m. – 8:30 a.m.  
LOCATION: ROOM L238 North**

1. **WELCOME / CALL TO ORDER – Ben Green**
2. **APPROVAL OF MINUTES – ACTION (Enclosure) – Ben Green**
  - A. January 28, 2014
3. **TREASURERS REPORT – Information (Enclosure) – Cynthia Reyna**
  - A. Financial Report January 2014
4. **REQUEST FOR FUNDS – ACTION – (Enclosure) – Joe Martinez/Hank Murphy**
  - A. Request for Funds Spring 2014
5. **COMMITTEE REPORTS – Ben Green**
  - A. Nominating Committee – **ACTION –Ruben Garcia/Jesse Navarro**
    - Renew Chayo Moreno term to February 2017
  - B. Fundraising Committee
    - Gala 2014 – Melyn Acasio/Mitch Thompson
    - Golf Tournament 2014 – Patti Finnegan
6. **SWCF PROGRAM ACCOUNTS – ACTION (Enclosure) – Ben Green**
  - A. Seeking approval of finalized documents regarding Program Accounts
7. **GOVERNING BOARD REPORT – Nora Vargas, SWC Governing Board Trustee**
8. **SUPERINTENDENT/PRESIDENT REPORT – Melinda Nish, Ed.D.**
9. **ADJOURNMENT – Ben Green**

**Next meeting date: March 25, 2014**

**SOUTHWESTERN COLLEGE FOUNDATION  
MEETING MINUTES  
Tuesday, January 28, 2014 ♦ 7:30 a.m. – 8:30 a.m.  
LOCATION: ROOM L238 North**

**Present:** Melyn Acasio, Ruben Garcia, Jean Roesch, Melinda Nish, Ben Green, Dukie Valderrama, Mitch Thompson, Ricardo Macedo, Nora Vargas, Jesse Navarro, Cynthia Reyna, Holly Hiding (arrived at 7:41 a.m.) and Joe Martinez (arrived at 7:41 a.m.)

**Absent:** Hank Murphy, Linda Gilstrap, Chayo Moreno, David Hoffman, Kimberly Paul and Patti Finnegan

**Recorder:** Dawn Perez

**1. WELCOME / CALL TO ORDER – Ben Green**

President Green called the meeting to order at 7:40 a.m. and welcomed everyone.

**2. TREASURERS REPORT – Information – (Enclosure) – Cynthia Reyna**

- A. Richard Ina, UBS Financial Services, provided an update on the investment account and a summary of how the stock market is doing in general.
- B. Financial Report December 2013  
Cynthia Reyna presented the Financial Report for December 2013. She also advised that all Gala 2013 funds have been collected. Ben Green advised that he and David Hoffman closed the Wells Fargo accounts and transferred the remaining funds to the Foundation's account at Sea Coast Commerce Bank.

**3. APPROVAL OF MINUTES – ACTION (Enclosure) – Ben Green**

- A. Motion made by Ruben Garcia, seconded by Jesse Navarro and unanimously approved to accept the minutes for December 17, 2013.

**4. COMMITTEE REPORTS – Ben Green**

- A. Fundraising Committee
  - Gala 2014 – Melyn Acasio
    - Melyn reported that she and Linda Gilstrap toured the Coronado Marriott Hotel as a potential venue for the Gala. The Marriott provided three proposals at different financial levels for consideration. She also mentioned that the Venue at Eastlake was also considered but wasn't considered a good fit due to having to rent everything. The Imperial Beach Hotel was checked into as well, but there is concern that they will not be able to accommodate our needs. The group talked about going outside of the district for a venue. It was decided to look into the Jacobs Center and the Hall of Champions.
  - Golf Tournament 2014 – Melyn Acasio
    - Fundraising goal for the event is \$30,000-\$35,000.
    - Dukie Valderrama and Ruben Garcia agreed to be Master of Ceremonies for Golf Tournament 2014.

**5. SWCF VENDOR SOLICITATION POLICY – ACTION (Enclosure) – Ben Green**

- A. Motion made by Jean Roesch, seconded by Holly Hiding and unanimously approved to adopt the draft Vendor Solicitation Policy.

**6. GOVERNING BOARD REPORT – Nora Vargas, SWC Governing Board Trustee**

Several trustees attended the CCLC conference in Sacramento. Highlights from that conference are that the budget situation is very positive, student success initiatives and there will be no fee increase in 2015. Trustee Vargas asked for input regarding Foundation goals and priorities in order to better represent and advocate for these efforts in her role as SWC Governing Board liaison.

**7. SUPERINTENDENT/PRESIDENT REPORT – Melinda Nish, Ed.D.**

Dr. Nish reported on the following:

- Senate Bill 850 has been introduced to allow baccalaureate degrees through community colleges. In its current form this would include bachelor degrees that are not offered by public universities; very specific career technical programs.
- Governor's budget includes 3% enrollment growth, \$100 million student success initiative, and potentially \$50 million for innovation grants on how to help students complete and transfer more efficiently.
- Timing is right for discussions between SWCF and SWC regarding hiring of an Executive Director and a staffing plan.
- Need to embrace an Annual Fund campaign with a focus on alumni and emeritus.
- Student headcount is up 6%.

**8. ADJOURNMENT – Ben Green**

The meeting adjourned at 8:40 a.m.

**Next meeting date: March 25, 2014**

## SOUTHWESTERN COLLEGE FOUNDATION

## FUNDS SEGREGATION REPORT

01/01/14 - 01/31/14

Account Name	Fair Market Value as of January 1, 2014	Inflow	Outflow	Gain/(Loss)	Fair Market Value as of January 1, 2014
<b>Unrestricted Funds Accounts</b>					
UBS Brokerage Accounts	\$169,136.50	\$0.00	\$2,455.11	-\$5,161.84	\$161,519.56
Wells Fargo Checking	\$5,028.20	\$50.00	\$5,278.20	\$0.00	-\$200.00
Wells Fargo Savings	-\$12.00	\$12.00	\$6.00	\$0.00	-\$6.00
Seacoast Commerce Bank Checking	\$16,893.01	\$17,527.60	\$15,305.50	\$0.00	\$19,065.11
Seacoast Commerce Bank Savings	\$50,301.94	\$0.00	\$0.00	\$0.00	\$50,301.94
<b>Sub-Totals</b>	<b>\$241,347.65</b>	<b>\$17,589.60</b>	<b>\$23,044.81</b>	<b>-\$5,161.84</b>	<b>\$230,680.61</b>
<b>Temporarily Restricted Funds Accounts</b>					
UBS Brokerage Account (See Attachment for Scholarship Funds Breakdown)	\$698,046.37	\$6.00	\$0.00	-\$20,243.34	\$677,809.03
Seacoast Commerce Bank Checking (See Attachment for Pilot Program Accounts Breakdown)	\$42,182.69	\$50.00	\$37,500.00	\$0.00	\$4,732.69
<b>Sub-Totals</b>	<b>\$740,229.06</b>	<b>\$56.00</b>	<b>\$37,500.00</b>	<b>-\$20,243.34</b>	<b>\$682,541.72</b>
<b>Total Funds Accounts</b>	<b>\$981,576.71</b>	<b>\$17,645.60</b>	<b>\$60,544.81</b>	<b>-\$25,405.18</b>	<b>\$913,222.32</b>

# **SOUTHWESTERN COLLEGE FOUNDATION**

## **Statement of Financial Position**

**JANUARY 31, 2014**

**(UNAUDITED)**

### **ASSETS**

Checking/Savings			
Operating Account	\$	23,597.80	
Money Market Account		<u>50,338.25</u>	
Total Checking/Savings			\$ 73,936.05
Other Assets			
Marketable Securities			
Unrestricted		161,519.55	
Temporarily Restricted		<u>677,809.03</u>	
Total Marketable Securities			
Total Other Assets			<u>839,328.58</u>
<b>TOTAL ASSETS</b>			<b>\$ <u>913,264.63</u></b>

### **LIABILITIES & NET ASSETS**

Other Current Liabilities			
Due to Southwestern College	\$	101.00	
Community Outreach		<u>2,462.10</u>	
Total Current Liabilities	\$		<u>2,563.10</u>
Total Liabilities			2,563.10
Net Assets			
Temp. Restricted Net Assets		646,075.00	
Unrestricted Net Assets		255,145.04	
Net Income		<u>9,481.49</u>	
Total Equity			<u>910,701.53</u>
<b>TOTAL LIABILITIES &amp; NET ASSETS</b>			<b>\$ <u>913,264.63</u></b>

# **SOUTHWESTERN COLLEGE FOUNDATION**

## **Profit & Loss**

**For The Seven Months Ended January 31, 2014**

**(UNAUDITED)**

	<u>January '14</u>	<u>Year-to-Date</u>
<b>Ordinary Income/Expense</b>		
Dividend/Interest - Unrestricted	312.95	4,852.85
Dividend/Interest - Temporarily Restricted	772.53	11,656.75
Realized gain/loss - Unrestricted	-5,474.79	5,980.14
Realized gain/loss - Temporarily Restricted	-20,973.56	34,231.19
Direct Public Contributions- Temporarily Rest.	56.00	380.00
Direct Public Contributions- Unrestricted	2,365.40	7,221.92
<b>Total Income</b>	<u>-22,941.47</u>	<u>64,322.85</u>
<b>Gross Profit</b>	-22,941.47	64,322.85
<b>Expenses</b>		
Students Scholarship Awards	0.00	1,500.00
SWC Athletic department	0.00	17,600.00
SBDC - Small Business Dev Ctr	37,500.00	37,500.00
Bank Fees	16.00	1,494.01
Campus Activities/Events	6,000.00	19,065.12
Outside Services	0.00	8,876.00
Stipends	-50.00	750.00
Community Events	0.00	500.00
Hospitality	0.00	391.86
Postage	0.00	46.00
Taxes and Fees	0.00	80.00
Investment Expense	2,449.11	7,416.13
Office Expense	0.00	47.11
Membership & Dues	0.00	600.00
Conference, Conventions, Meetings	0.00	450.00
<b>Total Expense</b>	<u>45,915.11</u>	<u>96,316.23</u>
<b>Net Ordinary Income</b>	<u>-68,856.58</u>	<u>-31,993.38</u>
<b>Other Income/Expense: Special Events</b>		
<b>2013 Gala Scholarship:</b>		
Total 2013 Gala Income	450.00	86,831.00
Gala 2013 Expenses	305.50	45,356.13
<b>Total Other Income/Expense: 2013 Gala Scholarship</b>	<u>144.50</u>	<u>41,474.87</u>
<b>Net Income</b>	<u>-68,712.08</u>	<u>9,481.49</u>

**SOUTHWESTERN COLLEGE FOUNDATION**  
**Contributions Received**  
**JANUARY 2014**

Date	From	Memo	Recorded under	Amount
<b>RESTRICTED</b>				
01/06/2014	Southwestern Comm. College District	Contributions made through payroll, Temporarily Restricted Dec 12, 2013	SWC Sun	50.00
01/06/2014	Southwestern Comm. College District	Contributions made through payroll, Temporarily Restricted Dec 12, 2013	Hayden Stewart Scholarship	6.00
			<b>Sub-Total Temporarily Restricted</b>	<b>56.00</b>
<b>UNRESTRICTED</b>				
01/06/2014	Arthur J. Diaz	Frequently contributions Dec/13 Cont	General and Admn	250.00
01/06/2014	Sweetwater School District	Contributions made thru Payroll - Unrestricted Dec 12/13	General and Admn	684.00
01/06/2014	Unknown Donor	Contribution received thru United Way, donor is anonymous	General and Admn	911.40
01/06/2014	Kenneth W. Oberlander	Frequently contributions to the Annual fund Contribution	Undeposited Funds	20.00
01/06/2014	Southwestern Comm. College Distric	Contributions Received for Annual Fund	Pledges Receivable	500.00
			<b>Sub-Total Unrestricted</b>	<b>2,365.40</b>

Total Contribution Received **2,421.40**

**SOUTHWESTERN COLLEGE FOUNDATION**  
**Programs/Projects Report**  
**Fiscal Year 2013**

Date	Num	Name	Memo	Amount
<b>Campus Activities/ Events</b>				
10/11/2013	1037	CLIFF	Funding for Culture & Language Intl Film Fest	300.00
10/11/2013	1038	We End Violence	Funding for Gendesr Equity Committee projects	1,000.00
10/11/2013	1039	SWC Architecture Club	Funding for University Campus Tours FA/13 and SP/14	500.00
10/11/2013	1040	African American Alliance	Funding for African American success Series Fall 2013	600.00
10/11/2013	1041	SWC Art Gallery Trust	Funding for the Art Gallery speaker Series Fall 2013 Spring 2014	1,000.00
10/11/2013	1042	Puente Club	Funding for Puente Club University Visists FA/13	4,500.00
10/25/2013	1044	Phi Theta Kappa	Funding for the Phi Theta Kappa Radio Project License	415.00
			<b>Total October</b>	<b>8,315.00</b>
11/04/2013	1047	Rob Estigoy	Funding for FilAm History month Oct 2013 Presenter	75.00
11/04/2013	1048	Ella DeCastro Baron	Presenter funding for FilAm History month	75.00
11/04/2013	1049	Bridget Mabunga	Presenter funding for FilAm History month	175.00
11/04/2013	1050	Jen Palmares Meadows	Presenter funding for FilAm History month	175.00
11/04/2013	1051	Donna Miscolta	Presenter funding for FilAm History month	175.00
11/21/2013	1056	Henry Aronson	Hospitality Purchases for FilAm History Month Series Funding	75.12
			<b>Total November</b>	<b>750.12</b>
12/13/2013	1059	SWC Architecture Club	Funding for the Design Village Competition Apr 2014	1,000.00
12/13/2013	1060	SWC African American Alliance	Funding for the MLK Breakfast 2014	1,000.00
12/13/2013	1061	SWC Fine Arts Trust	Funding for African American History Month Events 2014	2,000.00
			<b>Total December</b>	<b>4,000.00</b>
01/15/2014	1063	SWC Sun	Funding for student Journalist Convention	6,000.00
			<b>Total January</b>	<b>6,000.00</b>
<b>Grand Total</b>				<b>19,065.12</b>

**Community Events**

10/11/2013	1036	National University	Tickets to National University Gala 10/19/13	500.00
			<b>Total October</b>	<b>500.00</b>
<b>Grand Total</b>				<b>500.00</b>



**SOUTHWESTERN COLLEGE FOUNDATION**  
**Statement of Cash Flows**  
**07/01/13 - 01/31/14**

**Jul - Jan 14**

**CASH FLOWS USED BY OPERATING ACTIVITIES**

Increase in net assets	\$ 9,481.49	
Adjustments to reconcile increase in net assets to net cash provided by operating activities:		
Unrealized gain on investments	(17,157.23)	
Decrease in pledges receivable	1,158.00	
Decrease in prepaid expenses	6,500.00	
Decrease in accounts payable	(828.00)	
Decrease in due to Southwestern College	<u>(20,000.00)</u>	
Net cash used by operating activities		\$ -20,845.74

**CASH FLOWS FROM INVESTING ACTIVITIES**

Net proceeds from sale of investment	<u>(14,214.17)</u>
Net cash increase for period	-35,059.91
Cash at beginning of the year	<u>108,995.96</u>
<b>Cash at end of period</b>	<u><u>73,936.05</u></u>

**Southwestern College Foundation**  
**Temporarily Restricted Funds Accounts Detail - 01/01/14 - 01/31/14**

**Scholarship Funds**

Account Description	FMV - 01/01/14	Inflow	Outflow	Gain/(Loss) -0.029	FMV - 01/31/14
♦ Athletic Endowment - 061	\$13,772.70			(399.41)	\$13,373.29
♦ CAN Scholarship - 032	\$131,933.83		\$0.00	(3,826.08)	\$128,107.75
♦ Douglas Barnhart Scholarship - 059	\$39,602.40			(1,148.47)	\$38,453.93
♦ Eastlake Company - 058	\$31,870.87			(924.26)	\$30,946.62
♦ Garden of Giving -037	\$75,718.13			(2,195.83)	\$73,522.31
♦ Jean Wear Scholarship - 056	\$6,595.88			(191.28)	\$6,404.60
♦ McMillin Companies - 052	\$33,092.19			(959.67)	\$32,132.51
♦ Metallic Scholarship - 016	\$12,579.96			(364.82)	\$12,215.15
♦ M. Watkins Scholarship - 036	\$14,564.11			(422.36)	\$14,141.75
♦ Otay Mesa Child Development - 044	\$16,836.14			(488.25)	\$16,347.89
♦ Tantalo/Conti Scholarship - 033	\$49,661.76			(1,440.19)	\$48,221.57
♦ Sarah Riker Scholarship - 046	\$5,131.19			(148.80)	\$4,982.38
♦ Hayden Stewart Scholarship - 034	\$103,754.84	\$6.00		(3,008.89)	\$100,751.95
♦ Valenzuela Scholarship - 055	\$18,045.70			(523.33)	\$17,522.38
♦ WalMart Scholarship -060	\$10,893.55			(315.91)	\$10,577.64
♦ SCEA Scholarship - 065	\$6,309.56			(182.98)	\$6,126.59
♦ Luckman Scholarship -066	\$6,086.61			(176.51)	\$5,910.09
♦ Lassman Scholarship - 054	\$14,756.75			(427.95)	\$14,328.80
♦ Carolyn Brady Fund - 053	\$106,840.20		\$0.00	(3,098.37)	\$103,741.84
<b>Totals</b>	<b>\$698,046.37</b>	<b>\$6.00</b>	<b>\$0.00</b>	<b>-\$20,243.34</b>	<b>\$677,809.03</b>

**Program Accounts Pilot Program**

Account Description	FMV - 01/01/14	Inflow	Outflow	Gain/(Loss)	FMV - 01/31/14
♦ SWC Retirees Scholarship Fund	\$1,750.00	\$0.00	\$0.00	\$0.00	\$1,750.00
♦ Micro Enterprise Family Child Care Program	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00
♦ SBDC Small Business Development Ctr	\$37,500.00	\$0.00	\$37,500.00	\$0.00	\$0.00
♦ SSG Joshua P Mattero Memorial Fnd	\$632.69	\$0.00	\$0.00	\$0.00	\$632.69
♦ Presidents Circle	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00
♦ SWC Sun	\$300.00	\$50.00	\$0.00	\$0.00	\$350.00
<b>Totals</b>	<b>\$42,182.69</b>	<b>\$50.00</b>	<b>\$37,500.00</b>	<b>\$0.00</b>	<b>\$4,732.69</b>

## SWC FOUNDATION REQUESTS FOR FUNDS: FEBRUARY 25, 2014

### Student/College Activities

1. **Requestor:** School of Counseling & Personal Development  
**Purpose:** Hermanos Unidos—Brothers United (HUBU) Region X Conference  
**Amount of Request:** \$2,375 **Amount Last Funded:** N/A  
**Matching Funds:** None  
**Request History:** None for this specific project  
**Approx. Event Date(s):** April 25, 2014

HUBU is designed to bridge the achievement gap for Latino and African American male community college students. Conference workshops will increase motivation, encourage success and build confidence to help male students of color succeed and graduate community college or transfer to a university. Other San Diego area community colleges have hosted this annual conference over the past few years. SWC has committed to hosting this year's conference. Funds will be used for refreshments, printing and T-shirts for the attendees.

#### Request for Funds Committee Recommendation:

Approved: ☐ Yes ☐ No Amount \_\_\_\_\_

2. **Requestor:** School of Counseling & Personal Development/EOPS  
**Purpose:** EOPS Summer Readiness Program (SRP)  
**Amount of Request:** \$3,600 **Amount Last Funded:** N/A  
**Matching Funds:** CCC Chancellor's Office-EOPS in the amount of \$17,000 for books, supplies, faculty/tutor salaries expected.  
**Request History:** None for this specific project  
**Approx. Event Date(s):** 6/16/14-7/31/14

Funds are requested to cover the costs of two field trips that meet the objective of exposing students to educational institutions for future transfer and historical/cultural studies (Museum of Tolerance in Los Angeles and university visitation).

#### Request for Funds Committee Recommendation:

Approved: ☐ Yes ☐ No Amount \_\_\_\_\_

3. **Requestor:** Schools of Arts & Comm/HESA-AT  
**Purpose:** A Rite of Passage for African American Candidates for Graduation  
**Amount of Request:** \$1,100 **Amount Last Funded:** N/A  
**Matching Funds:** Potential funding from ASO (unknown amount)  
**Request History:** None for this specific project  
**Approx. Event Date(s):** May 2014

This event serves as a recognition ceremony for a milestone achievement for African Americans who continue to graduate in fewer numbers than other students. Funds will be used for ceremony needs (student stoles), student certificates, and refreshments.

#### Request for Funds Committee Recommendation:

Approved: ☐ Yes ☐ No Amount \_\_\_\_\_

4. **Requestor:** Psi Beta National Honor Society  
**Purpose:** WPA Psychology Conference  
**Amount of Request:** \$2,000 **Amount Last Funded:** \$2,000  
**Matching Funds:** Club fundraising and personal monies  
**Request History:** Several years  
**Approx. Event Date(s):** 4/24/14-4/27/14

The 2014 Western Psychology Association annual conference is being held in Portland, OR. Students attending this conference will be able to learn about the career paths and current research in the field of psychology. They will have the opportunity to meet with professionals and educators working in the field. Funds will be used towards conference registration and travel costs associated with attending this conference.

#### Request for Funds Committee Recommendation:

Approved: ☐ Yes ☐ No Amount \_\_\_\_\_

5. **Requestor:** Phi Theta Kappa  
**Purpose:** International Convention  
**Amount of Request:** \$2,000 **Amount Last Funded:** \$2,840 (2011)  
**Matching Funds:** Club fundraising and personal monies

**Request History:** Several years  
**Approx. Event Date(s):** 4/24/14-4/26/14

This International Conference will be held in Orlando, FL. Students attending this conference will learn leadership and service through the Phi Theta Kappa Academy, attend personal development forums and educational forums to learn about college completion and scholarships, and meet with admission counselors from colleges and universities to learn about their schools and transfer opportunities. Funds will be used towards conference registration and travel costs associated with attending this conference.

**Request for Funds Committee Recommendation:**

Approved: ☐ Yes ☐ No Amount \_\_\_\_\_

6. **Requestor:** School of Health, Exercise Science, Athletics & Applied Technology  
**Purpose:** Athletic Hall of Fame  
**Amount of Request:** \$240 **Amount Last Funded:** \$160  
**Matching Funds:** Ticket sales and other sponsorships  
**Request History:** Several years  
**Approx. Event Date(s):** April 26, 2014

This annual event honors new inductees into Southwestern College's Athletic Hall of Fame. Funds are for a table sponsorship.

**Request for Funds Committee Recommendation:**

Approved: ☐ Yes ☐ No Amount \_\_\_\_\_

7. **Requestor:** Higher Education Center San Ysidro  
**Purpose:** 25<sup>th</sup> Anniversary Celebration  
**Amount of Request:** \$2,000 **Amount Last Funded:** N/A  
**Matching Funds:** Potentially, \$500 from ASO  
**Request History:** N/A  
**Approx. Event Date(s):** May 8, 2014

Celebrate the 25<sup>th</sup> anniversary of HEC San Ysidro with the local community and college by highlighting student learning, accomplishments and success. 500 attendees are anticipated. Funds are for publicity, refreshments, and entertainment.

**Request for Funds Committee Recommendation:**

Approved: ☐ Yes ☐ No Amount \_\_\_\_\_

8. **Requestor:** Higher Education Center Otay Mesa  
**Purpose:** Open House  
**Amount of Request:** \$500 **Amount Last Funded:** N/A  
**Matching Funds:** Potentially \$1,650 from ChLC and ASO. HECOM will provide \$400.  
**Request History:** N/A  
**Approx. Event Date(s):** April 29, 2014

The purpose of this event is to outreach to the neighboring feeder schools. The Open House provides an opportunity to showcase the signature programs offered at HEC Otay Mesa and disseminate information to potential students. Funds will be used for prize giveaways, music, decorations, and refreshments.

**Request for Funds Committee Recommendation:**

Approved: ☐ Yes ☐ No Amount \_\_\_\_\_

**One other request deferred to fall 2014 application period due to its event dates.**

**Sponsorship of Community Events (Advertising/Publicity)**

None

**General and Administrative**

None

**Ongoing Financial Commitments (Information Item)**

N/A

Rev'd 2/10/14

**SOUTHWESTERN COLLEGE FOUNDATION  
REQUEST FOR FUNDS APPLICATION**

**COVER PAGE**

**Campus Activity/Organization**

Name of School/Unit/Department: School of Counseling and Personal Development

Name of Project Requesting Funding: HUBU Region X Conference

Amount of Funding Request: \$2375.00

Date(s) of Project April 25, 2014

If approved, please provide check payable information:

\_\_\_\_\_

1. Has this project previously received funding from the Southwestern College Foundation? Yes ☐ No ☒  
If yes, please indicate name of project, date(s) and amount of funding received: \_\_\_\_\_  
Also, did you submit the required "Post Project Evaluation" form? Yes ☐ No ☐
2. Do you currently support the Southwestern College Foundation? Yes ☒ No ☐  
("support" is defined as contributions of time, talent or treasury)  
Please describe the type of support that you provide to the Southwestern College Foundation:
- \_\_\_\_\_

**PLEASE NOTE:**

Post Project Evaluations **must** be completed and submitted to SWCF within 30 days after project is concluded. **Future funding requests will NOT be considered if the Post Project Evaluation form is not submitted in compliance with this requirement (see next page).**

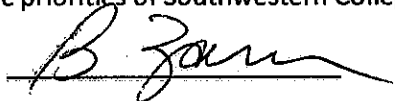
**REQUIRED COLLEGE SIGNATURES**

Name of Applicant (please print) David Ramirez

Telephone: (619) 421-6700, x5234

Email: dramirez@swccd.edu

Signature of Dean, Director or Vice President indicates that the proposed activity is approved and in alignment with the strategic priorities of Southwestern College.



Dean, Director or Vice President (signature required)

Date

**SWC FOUNDATION APPLICATION REVIEW PROCESS AND DETERMINATION (for SWCF use only)**

Approved: Yes ☐

No ☐

Amount: \$ 2375.00

Review Date: \_\_\_\_\_

Notification Date: \_\_\_\_\_

SWCF Authority: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Notes: \_\_\_\_\_

Southwestern College  
**HUBU**  
Hermanos Unidos – Brothers United  
Friday, April 25, 2013

The SWC HUBU Committee is requesting \$2375 from the Southwestern College Foundation to host the **5<sup>th</sup> Annual Region 10 HUBU Conference** on Friday, April 25, 2014. MiraCosta College hosted the 4<sup>th</sup> Annual Conference in 2013 and San Diego City College, which began HUBU, hosted in 2012. Southwestern College has attended the last two conferences and has committed to hosting this year's conference.

HUBU is designed to bridge the achievement gap for Latino and African-American male community college students. We see fewer community college male students graduating community college and transferring to universities. This conference is designed to help male students of color succeed in college. Even though the focus of HUBU is to support African-American and Latino males, all male students will be welcomed to participate. We plan to have inspirational opening and closing speakers with workshops designed to increase motivation, encourage success and build confidence so more male students of color will graduate community college and transfer to the university.

We plan to have approximately 125 male student participants from Region X community colleges. We have formed a working committee made up of administrators, faculty, staff, and students to confirm speakers and workshop presenters. SWC has an internal committee that will collaborate with the regional group to ensure full participation from areas colleges.

We believe students in general, and male students of color in particular make major and career decisions based on what they know. Unfortunately, television, film, and social media do not provide many positive role models for students of color. Our goal is for conference participants to see speakers and presenters who look like them share some of their joys and triumphs of their academic and professional journey. Our committee is determined to provide a successful and powerful conference so that students walk away feeling confident, prepared, and ready to take on their journey.

HUBU - Conference  
Hermanos Unidos – Brothers United  
Friday, April 25, 2014

Budget and Budget Narrative

Item	Approximate Cost
Continental Breakfast	300.00
Lunch 125 @ \$7	875.00
Printing Costs	450.00
T-shirts	750.00
<b>TOTAL</b>	<b>\$2375.00</b>

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Southwestern College  
**HUBU**  
Hermanos Unidos – Brothers United  
Friday, April 25, 2013

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Rev'd 2/10/14

**SOUTHWESTERN COLLEGE FOUNDATION  
REQUEST FOR FUNDS APPLICATION**

**COVER PAGE**

**Campus Activity/Organization**

Name of School/Unit/Department: School of Counseling and Personal Development/EOPS

Name of Project Requesting Funding: Summer Readiness Program

Amount of Funding Request: \$3600.00  
7/31/14

Date(s) of Project 6/16/14 through

If approved, please provide check payable information:

Make check payable to: SWC EOPS Trust Account #79-613098-699000-29510-10

1. Have you previously received funding from the Southwestern College Foundation? Yes ☐ No ☒

If yes, please indicate name of project, date(s) and amount of funding received: \_\_\_\_\_

Also, did you submit the required "Post Project Evaluation" form? Yes ☐ No ☐

2. Do you currently support the Southwestern College Foundation? Yes ☒ No ☐

("support" is defined as contributions of time, talent or treasury)

Please describe the type of support that you provide to the Southwestern College Foundation:

EOPS Faculty/Administrators donate to scholarship fund

**PLEASE NOTE:**

Post Project Evaluations **must** be completed and submitted to SWCF within 30 days after project is concluded. **Future funding requests will NOT be considered if the Post Project Evaluation form is not submitted in compliance with this requirement (see next page).**

**REQUIRED COLLEGE SIGNATURES**

Name of Applicant (please print) Arle Ricasa, Director of EOPS

Telephone: 482-6360

Email: aricasa@swccd.edu

Signature of Dean, Director or Vice President indicates that the proposed activity is approved and in alignment with the strategic priorities of Southwestern College.



B. Zam 2/10/14

2-7-14

Dean, Director or Vice President (signature required)

Date

**SWC FOUNDATION APPLICATION REVIEW PROCESS AND DETERMINATION (for SWCF use only)**

Approved: Yes ☐

No ☐

Amount: \$           

Review Date:           

Notification Date:           

SWCF Authority:           

Title:           

Date:

## **Description and List of Expenses**

### **EOPS Summer Readiness Program (SRP)**

Funds from the SWC Foundation are requested to cover the costs of two field trips that meet the objective of exposing SRP students to educational institutions for future transfer, and historical/cultural studies.

#### **1. Museum of Tolerance**

Los Angeles

Bus Transportation	\$1200.00
Admission Price	400.00
Lunch	400.00
Total	<u>\$2000.00</u>

#### **University Visitation (TBA)**

Bus Transportation	\$1200.00
Lunch	400.00
	<u>1600.00</u>

Total Requested Funds:

\$3600.00

**\*Matching Funds** to cover the cost of books, supplies and faculty and tutor salaries for the amount of **\$17,000.00** has been submitted to the California Community College Chancellor's Office-EOPS Department. This request is expected to be approved and funded. Documentation of this Proposal/Request is attached.

## 2013-14 EOPS MID-YEAR REPORT

### Declaration of 2013-2014 Unused EOPS Funds

This certifies that Southwestern College has determined that it will have \$ 0 of unused 2013-2014 EOPS funds and hereby requests that our 2013-2014 EOPS base allocation be reduced by this amount.

### Request for 2013-2014 Reallocated EOPS Funds

This certifies that Southwestern College requests EOPS reallocated funds for 2013-2014. This request addresses the four priorities for granting reallocated funds as established and identified in the "Instructions for Completing EOPS Reports". The funds will be used as follows:

Amount: \$ 12,000.00 Priority # 1 \*\* Purpose: Provide book grant for Summer Readiness Program

Amount: \$ 5,000.00 Priority # 2 \*\* Purpose: Counseling hours for our Summer Readiness Program

\*\* For definitions of priorities, see "Instructions for Completing EOPS Reports"

John Puri (619) 482-6360 1-10-14  
Signature and Name of EOPS Director Phone Number Date

B. Zamora 1/14/14  
Signature and Name of Supervising Administrator for EOPS Date

PLA 1/21/14  
Signature and Name of District Business Officer Date

[Signature] 1-28-14  
Signature and Name of Superintendent/President or Designee Date

**Return one form postmarked with all required original signatures by  
February 1, 2014 to:**

Kelly Gornik, EOPS/CARE Specialist  
California Community Colleges  
1102 Q Street, Suite 4554  
Sacramento, CA 95811-6549

## Project Description

### Summer Readiness Program 2014

EOPS is proud to bring back the Summer Readiness Program, SRP, for summer 2014. The program will focus on providing incoming first year students with the ability to focus on strengthening their math preparation as well as academic and personal success. We will be teaming our academic curriculum with Math 45 and PD116. The pairing of these two courses will help to transition the students into Math 60 in the fall 2014 thus, strengthening their first year experience. We believe this will support the college's Math Boot Camp initiative. In addition, the program will have a strong community building and student development component through social, cultural, educational and civic activities.

A strong and talented team of faculty, staff, and administrators are working to create an opportunity for incoming EOPS students to Southwestern College. SRP has had a very long and successful tradition here. The program will assist in developing a culture of community among some of the most vulnerable students in college, thus improving their opportunity for college completion.

The SRP will be serving 36 students who are first year freshmen to the college. The courses and staffing for the program will be taught will be as follows:

One section of Math 45 – One instructor

One PD 116 – one instructor

One Math peer tutoring lab – 3 peer tutors

One counselor

3 peer mentors

SRP aligns with SWC's Strategic Plan by meeting efforts for Student Success. The program is specifically designed to increase the retention, persistence and completion. By developing a cultural of academic and cultural competency is infused in the curriculum as well as the program activities.

## SOUTHWESTERN COLLEGE FOUNDATION REQUEST FOR FUNDS APPLICATION

**COVER PAGE**

**Campus Activity/Organization**

Name of School/Unit/Department: School of Arts & Communication & School of Health, Exercise Science, Athletics & Applied Technology

Name of Project Requesting Funding: A Rite of Passage for African American Candidates for Graduation

Amount of Funding Request: \$1100 Date(s) of Project May, 2014

If approved, please provide check payable information:

1. Have you previously received funding from the Southwestern College Foundation? Yes ☒ No ☐  
If yes, please indicate name of project, date(s) and amount of funding received:   
Also, did you submit the required "Post Project Evaluation" form? Yes ☒ No ☐

2. Do you currently support the Southwestern College Foundation? Yes ☒ No ☐  
 ("support" is defined as contributions of time, talent or treasury)

Please describe the type of support that you provide to the Southwestern College Foundation:

The School of Arts and Communication and The School of Health, Exercise Science, Athletics & Applied Technology supports the foundation in a number of ways.

**PLEASE NOTE:**

Post Project Evaluations **must** be completed and submitted to SWCF within 30 days after project is concluded. **Future funding requests will NOT be considered if the Post Project Evaluation form is not submitted in compliance with this requirement (see next page).**

## REQUIRED COLLEGE SIGNATURES

Name of Applicant (please print) Donna Arnold

Telephone: 619 482-6371

Email: [darnold@swccd.edu](mailto:darnold@swccd.edu)

Signature of Dean, Director or Vice President indicates that the proposed activity is approved and in alignment with the strategic priorities of Southwestern College.

*[Handwritten signature]*

9/9/13

Dean, Director or Vice President *(signature required)*

Date

## SWC FOUNDATION APPLICATION REVIEW PROCESS AND DETERMINATION (for SWCF use only)

Approved: Yes ☐

No. [ ]

Amount: \$ 4,111.00

Review Date: 

Notification Date: 11/11/2011

SWCF Authority: 

Title: [REDACTED]

Date: 11/11/2019

## **Project Goals & Objectives**

Although Black student achievement has steadily risen, the achievement gap still persists as socio-economic disparities continue to be an obstacle African-Americans face, according to Richard Rothstein, author of "For Public Schools, Segregation Then, Segregation Since: Education and the Unfinished March."

Moreover Rothstein says policymakers have "developed a narrative of school failure," by focusing only on the slowly narrowing achievement gap between Blacks and whites, instead of the reasons Black students' performance has increased.

"Examining the causes of the improvement might inspire policymakers to wonder what policies, if any, were responsible for the gains and then try to intensify them."

Recognizing student achievement is an important step in the educational system. This event serves as recognition ceremony for a milestone achievement for African Americans who continue to graduate in fewer numbers than other students. It will also act as a motivator to assist students to persist toward greater educational goals.

### **Support for Student Learning**

This event will continue to support Southwestern College's core values for student learning in the following way.

#### *Mutual Respect, Integrity, Cultural Competence and Commonality*

Our event aims to mitigate stereotypes centered on African American achievement and intelligence. Such an event encourages respect and dignity by honoring students.

#### *Scholarship and Love for Learning/Critical Inquiry and Thinking*

This event offers students, faculty, staff, and the community the opportunity to join together in celebrating student achievement. It also introduces students to faculty, staff and the community. This event may very well serve as a catalyst to motivate student achievement.

### **Number of students, faculty and staff serviced**

200 students, faculty, staff and community members.

### **Alliance with SWC Strategic Plan**

#### **1. Student Success**

Promotes a culture of academic success by honoring students. It acknowledges students who might otherwise go unrecognized.

## 2. *Community Development*

This event will nurture relationships with other educators and community members. Often student, staff, and academic leaders are isolated and are not exposed to African American leaders and community members. In addition, students could benefit from interactions with community members.

### **Line-by-line budget**

Ceremony needs (student stoles)	\$800.
Student food	\$200.
Student Certificates	\$100.
<b>TOTAL</b>	<b>\$1,100.</b>

### **Matching Funds**

This event will be co-sponsored by the ASO and the School of Health, Exercise Science, Athletics & Applied Technology.



Rcvd 1/24/14

**SOUTHWESTERN COLLEGE FOUNDATION  
REQUEST FOR FUNDS APPLICATION**

COVER PAGE

**Campus Activity/Organization**

Name of School/Unit/Department: Psi Beta National Honor Society

Name of Project Requesting Funding: WPA Psychology Conference

Amount of Funding Request: \$2,000

Date(s) of Project 4/24/14-4/27/14

If approved, please provide check payable information:

Psi Beta

1. Have you previously received funding from the Southwestern College Foundation? Yes No  
If yes, please indicate name of project, date(s) and amount of funding received: 2,000 WPA conference  
Also, did you submit the required "Post Project Evaluation" form? Yes No

2. Do you currently support the Southwestern College Foundation? Yes No  
("support" is defined as contributions of time, talent or treasury)  
Please describe the type of support that you provide to the Southwestern College Foundation:

**PLEASE NOTE:**

Post Project Evaluations must be completed and submitted to SWCF within 30 days after project is concluded. Future funding requests will NOT be considered if the Post Project Evaluation form is not submitted in compliance with this requirement (see next page).

**REQUIRED COLLEGE SIGNATURES**

Name of Applicant (please print) Priscilla Martinez/Psi Beta

Telephone: 619-755-3886

Email: priscilliamartinez53@yahoo.com

Signature of Dean, Director or Vice President indicates that the proposed activity is approved and in alignment with the strategic priorities of Southwestern College.

Donna McElroy Psi Beta Advisor

1/14/14

Dean, Director or Vice President (signature required)

Date

**SWC FOUNDATION APPLICATION REVIEW PROCESS AND DETERMINATION (for SWCF use only)**

Approved: Yes No Amount: \$ \_\_\_\_\_

Review Date: \_\_\_\_\_ Notification Date: \_\_\_\_\_

SWCF Authority: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_

Notes: \_\_\_\_\_

**Western Psychology Conference 2013-2014  
Grant Proposal**

**Southwestern College  
Psi Beta Honor Society**



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## Psi Beta Honor Society WPA Conference Proposal

### Explanation of how expenditures will support student learning at Southwestern College.

I am submitting this request in the hopes of obtaining assistance from the Southwestern College Foundation for the costs associated with a trip to the 2014 Western Psychology Association's (WPA) annual conference. This year's conference is to be held in Portland, Oregon. The goals and objectives for the students attending this conference are to learn more about the career paths and current research in the field of psychology. They will be able to meet with professionals and educators working in the field and network with peers that have similar educational goals. Students will also acquire a better understanding of how to successfully transfer and pursue their education in psychology.

The conference directly aligns with Southwestern College's Strategic Plan, specifically the Teaching and Learning and Student Success Priorities. The students who attend the conference will gain valuable critical thinking skills and help them develop abilities for pursuing their educational goals. Attending the conference will assist students in this by making them aware not only of the various professional career goals available, but also introducing them to highly respected leaders in the field of psychology. Students will learn about cutting edge research currently being conducted and how to present research. Additionally, students are able to interact with peers who are also majoring in this exciting and diverse field and participate in valuable workshops that offer advice for those who wish to pursue graduate studies.

As members of Psi Beta, we have shown a commitment to academic excellence and a strong interest in psychology. In order for a student to become a member of this nationally recognized honor society, they must maintain an overall 3.2 grade point average in all academic courses taken.

The Southwestern College Foundation has previously awarded the members of Psi Beta Honor Society funds to help offset our costs for this trip. It is my hope that we can again receive the assistance of the Foundation. Any funds awarded to us will be divided evenly among the members who attend. Additionally we will fund the trip

through personal monies as well as Psi Beta Honor Society fundraising. For most students this may be their first and possibly only opportunity to attend a professional psychology conference. Community College students have limited access to academic research. Attendance at conferences such as the WPA allows students to have exposure to current research and is critical for those students that wish to be competitive in pursuing a graduate degree the field. Without the requested grant funding, it is my expectation that our members will not be able to attend the conference and have access to this invaluable educational experience.

Thank you for your time and assistance,

Priscilla Martinez

President, Southwestern College Chapter of the  
Psi Beta Honor Society for 2013-2014

## WPA Conference Proposal Line Budget

	Maximum	Minimum	Total for all persons (min-max range)
Flight Costs (roundtrip from SD to Portland)	United Airlines \$700.00 p/person	Southwest Airlines \$350.00 p/person	\$2450 -\$4900
Hotel Costs (Downtown Portland, Oregon)	WPA Hotel (Marriott) \$171.00 p/night Tax included	WPA Hotel (Marriott) \$171.00 p/night Tax included	\$2052
Conference Registration	\$75.00		\$75.00
Total (individual) Air + Hotel only	\$1,213.00	\$863	525.00
Total (group)	\$8491	\$6041	\$6566-\$9061

Total group cost range: \$ 6041- \$8491

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### Air travel

Southwest Airlines \$350 p/person x 7 persons =2450

United Airlines \$700 p/person x 7 persons =4900

### Hotel Costs

WPA hotel rooms (\$171 each) x 3 nights x 4 rooms = 2052

(We will assume that rooms are Double occupancy except for Advisor)

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Above totals do not include incidental costs (i.e.; meals, shuttles/cabs,). This would add approximately +\$200.00 to each student's costs.



## Southwestern College Foundation Request for Funding Application

The Southwestern College Foundation (SWCF) exists solely for the benefit of Southwestern College and awards approximately \$100,000 per year for campus activities/organizations, community event sponsorships and student scholarships. The availability of funds is formally announced at the beginning of the fall and spring semesters and Requests for Funding are reviewed once a semester, excluding summer. Important dates for submission of Requests for Funding and their award status for academic year 2013-14 are as follows:

Event/Project Dates	Submission Dates	Award Notification Dates	Submit to:
October – March	September 10, 2013	September 26, 2013	Dawn Perez
April – September	February 10, 2014	February 28, 2014	Office of Inst. Eff., Room 103A

### Campus activities/organizations

Priority consideration is given to those requests that reflect:

- Extracurricular activities that enhance student learning
- Request funding within the range of \$250-\$2,000
- Line item budgets that document matching funds and partnerships
- Campus units whose faculty and staff support the SWCF by partnering with their time, talent, or treasury
- SWCF acknowledgement of funding on electronic and printed materials related to project

### Community Events

Priority consideration is given to those organizations that:

- Operate within the Southwestern Community College District
- Directly support our students
- Support the SWCF by partnering with their time, talent or treasury.

### Student scholarships

These are restricted funds with defined purposes and eligibility criteria. Student scholarships represent the majority of funding that is allocated annually by the SWCF. Application forms and procedures for applying for these funds can be found on the College's website ([www.swccd.edu/ScholarshipApplication/](http://www.swccd.edu/ScholarshipApplication/)). It is important to note that the SWCF does not entertain unsolicited requests for scholarship funds.

### CHECKLIST FOR COMPLETED REQUEST FOR FUNDS APPLICATION

Request for Funds applications are considered complete when they contain the following items:

- Cover Page (see attached)
- Project Description that (*attach as necessary*):
  - Identifies project's goals and objectives
  - Demonstrates support for student learning
  - Identifies number of students, faculty and/or staff that will be served
  - Demonstrates alignment with Southwestern College's Strategic Plan
- Budget and Budget Narrative that provides (*attach as necessary*):
  - line item budget per category of identified funding needs (i.e. supplies, marketing, printing, travel, advertisements, etc.)
  - description of matching funds and provision of documentation from source of matching funds

Request for Funds applications that are incomplete (i.e. missing any of the required components listed above) will be returned to the applicant and can be re-submitted upon completion, in alignment with the due dates stated above.

Rcvd 11/4/13

**SOUTHWESTERN COLLEGE FOUNDATION  
REQUEST FOR FUNDS APPLICATION**

**COVER PAGE**

**Campus Activity/Organization**

Name of School/Unit/Department: Phi Theta Kappa

Name of Project Requesting Funding: International Convention

Amount of Funding Request: \$2000

Date(s) of Project April 24-26, 2013

If approved, please provide check payable information:

Phi Theta Kappa

1. Have you previously received funding from the Southwestern College Foundation? Yes ☒ No ☐

If yes, please indicate name of project, date(s) and amount of funding received:

International Conference, April 4-6, 2011, \$2840

Also, did you submit the required "Post Project Evaluation" form? Yes ☒ No ☐

2. Do you currently support the Southwestern College Foundation? Yes ☒ No ☐

("support" is defined as contributions of time, talent or treasury)

Please describe the type of support that you provide to the Southwestern College Foundation:

Monthly financial payroll deduction

**PLEASE NOTE:**

Post Project Evaluations **must** be completed and submitted to SWCF within 30 days after project is concluded. **Future funding requests will NOT be considered if the Post Project Evaluation form is not submitted in compliance with this requirement (see next page).**

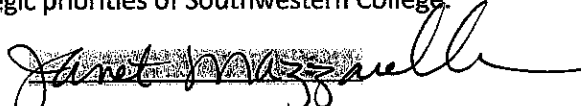
**REQUIRED COLLEGE SIGNATURES**

Name of Applicant (please print) Myriam S. Moody 

Telephone: 619.274.7101

Email: m.moody@swccd.edu

Signature of Dean, Director or Vice President indicates that the proposed activity is approved and in alignment with the strategic priorities of Southwestern College.



11-6-13

Dean Director or Vice President (signature required)

Date

**SWC FOUNDATION APPLICATION REVIEW PROCESS AND DETERMINATION (for SWCF use only)**

Approved: Yes ☐

No ☐

Amount: \$           

Review Date:           

Notification Date:           

SWCF Authority:           

Title:           

Date:

November 6, 2013

Dear Foundation Members:

Our SWC Alpha Pi Epsilon chapter of the Phi Theta Kappa Honor Society has the opportunity to attend an International Conference in Orlando, Florida on April 24-26, 2013. We are asking for your financial support in the amount of \$2,000 to help fifteen (15) members attend the conference.

Students have committed to pay for their airline ticket and the Phi Theta Kappa Academy. Also, they currently have \$500 from fundraising. They will continue to fundraise to match your contribution. Attached is a flyer with information about the conference.

**Total Cost for ten students to attend:**

<b>Num. of Items:</b>	<b>Item:</b>	<b>Cost per Item:</b>	<b>Total:</b>
15	Conference Registration Tickets	297	4455
15	Airfare	500	7500
15	Phi Theta Kappa Academy	97	1455
4 nights & 4 rooms	Hotel	1200	4800
Total Cost:			\$18,210

**Students' Contribution (Matching funds):**

<b>Num. of Items:</b>	<b>Item:</b>	<b>Cost per Item:</b>	<b>Total:</b>
15	Airfare	500	7500
15	Meals	97	1455
1	Fundraised	500	500
Total Cost:			\$9,455

**Contributions towards funding attendance to International Conference:**

<b>Source</b>	<b>Total:</b>
SWC Foundation	2,000
Phi Theta Kappa Students	9,455
Total Contributions:	11,455
Total Expenses:	\$18,210
Additional Fundraising needed:	-\$6,755

At this conference, our students will:

- Learn leadership and service through the Phi Theta Kappa Academy
- Attend educational forums to learn about college completion, scholarships,
- Attend personal development forums
- Be able to meet with admissions counselors from the senior colleges to learn about their school and transfer opportunities
- Listen to renowned guest speakers such as Alison Levine
- Participate in discussion groups on the speaker's topic.

Upon return student will disseminate the information in a presentation open to the entire college community. We thank you for your support and contribution to this great opportunity for our Phi theta Kappa Honor Society students. Please contact me, Myriam S. Moody, Advisor, if you need additional information at 619.274.7101.





## EXPERIENCE NERDNATION

Energizing, enlightening, motivational and invigorating — all are words attendees use to describe the Phi Theta Kappa Convention Experience. For those who have never attended Phi Theta Kappa Convention, it's an experience like none other. For returning attendees, it's something to look forward to year after year.

If you're thinking it's just another pep rally, think again. NerdNation, Phi Theta Kappa's Annual Convention, provides opportunities for advisor and student engagement that result in long term chapter and student success. Explore the opportunities that await you at NerdNation 2014 where it's "Cool 2B Smart!"

- [Phi Theta Kappa Academy](#)
- [Educational Forums](#)
- [Elections](#)
- [Hallmark Awards](#)
- [Marketplace](#)
- [Mini Sessions](#)
- [Senior College Transfer Fair](#)
- [General Session Speakers](#)

### OUR THREE-DAY AGENDA COMBINES:

- Educational sessions to foster personal and chapter development,
- Training to cultivate leaders,
- Thought-provoking speakers who broaden attendees' perspectives,
- Networking opportunities to share ideas and expand ones pool of resources and
- Awards presentations recognizing past achievements while setting the bar high for future success

Supporting your chapter's attendance at NerdNation 2014 will have a lasting impact on those selected to attend. For students, often attending a Phi Theta Kappa Annual Convention means their first time traveling outside of their home state. Advisors and students alike will return informed, energized and ready to jump into Phi Theta Kappa's programs with both feet.

The added return on investment comes from the ripple effect. The knowledge and resources NerdNation attendees gather combined with their contagious enthusiasm for Phi Theta Kappa programs help grow the chapter and promote an engaged student body.

Make plans now to be a part of NerdNation in Orlando, April 24-26. Secure the greatest savings by registering by **February 10, 2014**, at our lowest Early Bird Registration Rate.

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Phone: [800.946.9995](tel:800.946.9995) | Email: [convention@ptk.org](mailto:convention@ptk.org)



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## PHI THETA KAPPA ACADEMY

**When:** Thursday, April 24, 8:30 am - 2:30 pm

**For:** Members, Chapter Officers, Regional Officers and Advisors

### WHY ATTEND THE ACADEMY?

The Phi Theta Kappa Academy equips members, officers and advisors with marketable leadership skills and knowledge to benefit them individually and as Phi Theta Kappa leaders – ultimately contributing to both student and chapter success.

This year, the Academy program focuses on the powerful role of diversity and inclusivity in our chapters, on our college campuses and in the world around us. Two dynamic keynote speakers (soon to be announced) take participants on a journey through the foundations of diversity, lessons learned by experience, and the roles each person can play in creating a diverse and more inclusive environment.

In addition, Phi Theta Kappa experts will lead role-based breakout sessions allowing attendees to network with others exercising leadership in the same role (advisor, chapter officer/member and regional officer).

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Phone: [800.946.9995](tel:800.946.9995) | Email: [convention@ptk.org](mailto:convention@ptk.org)



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## ALISON LEVINE

Opening Ceremonies  
Explorer, Mountaineer, Author

Alison Levine is a history-making polar explorer and mountaineer. She not only served as team captain of the first American Women's Everest Expedition, but she also climbed the highest peak on each continent and skied to both the North and South Poles—a feat which fewer than 40 people in the world have achieved. In 2008, she made history as the first American to complete a 600-mile traverse from west Antarctica to the South Pole following the route of explorer Reinhold Messner. She completed this arduous journey on skis while hauling 150 pounds of gear and supplies in a sled harnessed to her waist.

In 2005, Levine founded the [Climb High Foundation](#), a nonprofit organization dedicated to improving the lives of jobless women in Africa by training them to be trekking guides and porters in their local mountains so that they would have the skills to earn a sustainable living wage through climbing-related tourism. Her work in Uganda enabled the first group of local women to make history when they climbed Uganda's highest peak Mt Stanley, in the Rwenzori Mountains. Her work in Uganda is the subject of the PBS documentary *Living Courageously*.

Levine currently works as an adjunct instructor at the United States Military Academy at West Point in the Department of Behavioral Sciences and Leadership and is a strategic advisor for the Thayer Leader Development Group at West Point, an executive education program that shares West Point leadership best practices with senior level-executives from the public and private sectors.

Levine is the author of the book *On the Edge: The Art of High Impact Leadership*. Having spent prolonged periods of time in some of the world's most dangerous and inhospitable places, she tackles the topics of creating cohesive teams, taking responsible risks and developing no-nonsense leaders that can succeed in times of uncertainty.

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Phone: [800.946.9995](tel:800.946.9995) | Email: [convention@ptk.org](mailto:convention@ptk.org)

**SOUTHWESTERN COLLEGE FOUNDATION  
REQUEST FOR FUNDS APPLICATION**

**COVER PAGE**

**Campus Activity/Organization**

Name of School/Unit/Department: Health, Exercise Science, Athletics & Applied Technology

Name of Project Requesting Funding: Athletic Hall of Fame

Amount of Funding Request: \$240

Date(s) of Project April 26, 2014

If approved, please provide check payable information:

Athletic Trust

1. Have you previously received funding from the Southwestern College Foundation? Yes ☒ No ☐  
If yes, please indicate name of project, date(s) and amount of funding received: Athletic Hall of Fame, April 27, 2013, \$160  
Also, did you submit the required "Post Project Evaluation" form? Yes ☐ No ☒

2. Do you currently support the Southwestern College Foundation? Yes ☐ No ☒  
("support" is defined as contributions of time, talent or treasury)  
Please describe the type of support that you provide to the Southwestern College Foundation:

**PLEASE NOTE:**

Post Project Evaluations **must** be completed and submitted to SWCF within 30 days after project is concluded. Future funding requests will NOT be considered if the Post Project Evaluation form is not submitted in compliance with this requirement (see next page).

**REQUIRED COLLEGE SIGNATURES**

Name of Applicant (please print) Peggy Ball

Telephone: 619-432-6370

Email: pball@swccd.edu

Signature of Dean, Director or Vice President indicates that the proposed activity is approved and in alignment with the strategic priorities of Southwestern College.

Terry Davis

November 13, 2014

Dean, Director or Vice President (signature required)

Date

**SWC FOUNDATION APPLICATION REVIEW PROCESS AND DETERMINATION (for SWCF use only)**

Approved: Yes ☐

No ☐

Amount: \$           

Review Date:           

Notification Date:           

SWCF Authority:           

Title:           

Date:           

Notes:

**SOUTHWESTERN COLLEGE FOUNDATION  
REQUEST FOR FUNDS APPLICATION**

**COVER PAGE**

**Campus Activity/Organization**

Name of School/Unit/Department: Higher Education Center at San Ysidro

Name of Project Requesting Funding: 25<sup>th</sup> Anniversary Celebration

Amount of Funding Request: \$2,000

Date(s) of Project May 8, 2014

If approved, please provide check payable information: Cynthia Nagura

1. Has this project previously received funding from the Southwestern College Foundation? No ☒  
If yes, please indicate name of project, date(s) and amount of funding received: N/A  
Also, did you submit the required "Post Project Evaluation" form?
2. Do you currently support the Southwestern College Foundation? Yes ☒  
("support" is defined as contributions of time, talent or treasury)  
Please describe the type of support that you provide to the Southwestern College Foundation: Payroll deduction as a SWC employee

**PLEASE NOTE:**

Post Project Evaluations **must** be completed and submitted to SWCF within 30 days after project is concluded. **Future funding requests will NOT be considered if the Post Project Evaluation form is not submitted in compliance with this requirement (see next page).**

**REQUIRED COLLEGE SIGNATURES**

Name of Applicant (please print) Silvia Cornejo

Telephone: 619-216-6755

Email: scorejo@swccd.edu

Signature of Dean, Director or Vice President indicates that the proposed activity is approved and in alignment with the strategic priorities of Southwestern College.

Silvia Cornejo

Dean, Director or Vice President (signature required)

02/10/14

Date

**SWC FOUNDATION APPLICATION REVIEW PROCESS AND DETERMINATION (for SWCF use only)**

Approved: Yes ☐

No ☐

Amount: \$ 2,000

Review Date: 02/10/14

Notification Date: 02/10/14

SWCF Authority:                     

Title:                     

Date: 02/10/14

Notes:

## **SOUTHWESTERN COLLEGE FOUNDATION**

### **REQUEST FOR FUNDING APPLICATION**

#### **PROJECT DESCRIPTION**

##### **Higher Education Center at San Ysidro (HEC SY) 25<sup>th</sup> Anniversary Celebration Community Event**

#### **Project Goals and Objectives**

##### Goal:

To celebrate the 25<sup>th</sup> Anniversary of the Higher Education Center at San Ysidro with the college and local community by highlighting student learning, accomplishments and success.

##### Objectives:

- Enhance student learning by providing current and prospective students with information and guidance on course offerings, student services and community support services in a community fair format.
- Showcase HEC SY student achievements.
- Provide outreach and provide positive publicity to the local community of the unique benefits of studying at the HEC SY.

#### **How Project Demonstrates Support for Student Learning**

This college community event would be multi-faceted and consist of:

- An educational fair highlighting specific fields of study (including Child Development, English as a Second Language and Legal Translation & Interpretation).
- Student Services available to students (including Counseling, Financial Aid, Disability Support Services, Personal Wellness).
- Community Services available to students (including South Bay Community Services agency which offers social services support).
- Showcase of HEC SY student achievements (including performances by music and dance classes).
- Associated Students Organization and HEC SY Student Community Group offering opportunity for student involvement and leadership.
- Refreshments provided for all guests (students, faculty, staff, community members).
- Cultural entertainment (including student mariachi and/or ballet folklórico performance).

#### **Number of Students, Faculty and Staff to be Served**

An estimated number of 500 attendees is anticipated. This will include students, faculty, staff from all Centers/campuses, as well as Southwestern College executive leadership and Governing Board members. In addition, the media, community partners and guests from the

local community will also be invited to this one-time 25<sup>th</sup> Anniversary Celebration.

### **How Project Demonstrates Alignment with Southwestern College Strategic Plan**

Two of the Southwestern College 2012-15 Strategic Priorities will be fulfilled during this community event: Student Access and Student Success.

Student Access: The Higher Education Center at San Ysidro (HEC SY) 25<sup>th</sup> Anniversary Celebration Community Event will embrace a student-centered climate by providing current and prospective students with valuable firsthand access to information on courses, career paths and student services such as financial aid and counseling directly from staff and faculty.

Student Success: Closely related to the above Strategic Priority, access to student support services will increase the feasibility that students will be able to continue and complete their educational goals. Student accomplishments and achievements will also be showcased with pride at this event and highlighting this success will consequently encourage students to complete their studies.

## BUDGET AND BUDGET NARRATIVE

### Higher Education Center at San Ysidro (HEC SY) 25<sup>th</sup> Anniversary Celebration Community Event

Budget for Higher Education at San Ysidro 25th Anniversary Community Celebration	
Category	Amount
Publicity	\$ 250.00
Refreshments	\$ 1,250.00
Entertainment	\$ 500.00
TOTAL	\$ 2,000.00

Publicity – Printing and postage for invitations. Printing of posters and flyers to publicize the event in advance.

**NOTE: The SWCF will be graciously acknowledged on all electronic and printed materials related to this event.**

Refreshments – A simple menu of food and drink will be provided for all guests. Paper goods to serve the refreshments will also be purchased.

Entertainment – Funds will be used to pay an appreciation stipend to a student mariachi and/or ballet folklórico group who will provide entertainment.

#### Matching Funds and Partnerships

The Higher Education Center at San Ysidro will also request and anticipates receiving support from the Associated Students Organization (ASO). A petition of \$500 will be submitted to assist in additional expenses to provide refreshments for guests.

The South Bay Community Services, a well-established community development agency in the South Bay, is committed to participate in the 25<sup>th</sup> Anniversary Celebration Community event by hosting an informational table of their social services which are available to students. Please see the letter of support attached.

As hosts of this grand event, the HEC SY staff, faculty and student volunteers will provide in-kind, several hours of planning and coordination, to ensure that it is executed successfully.





February 7, 2014

To the Southwestern College Foundation,

It is with pleasure that the South Bay Community Services agency confirms our interest in participating in the Southwestern College 25th Anniversary Celebration event on May 8, 2014 with an informational table. We value our partnership with the Higher Education Center at San Ysidro and the opportunity to offer various community support services to students.

Thank you.

Sincerely,

A handwritten signature in black ink, appearing to read "M. Torre", is written over a horizontal line.

Mauricio Torre  
Youth and Family Development Department Director

south bay community services

430 F Street • Chula Vista, California 91910  
O: 619.420.3620 • F: 619.420.8722

24 hr. Hotline: 800.640.2933

Rec'd Feb 10, 2014

**SOUTHWESTERN COLLEGE FOUNDATION  
REQUEST FOR FUNDS APPLICATION**

**COVER PAGE**

**Campus Activity/Organization**

Name of School/Unit/Department: Higher Education Center at Otay Mesa

Name of Project Requesting Funding: Open House

Amount of Funding Request: \$500

Date(s) of Project April 29, 2014

If approved, please provide check payable information:  
Lourdes Sevilla

1. Has this project previously received funding from the Southwestern College Foundation? Yes ☐ No ☒

If yes, please indicate name of project, date(s) and amount of funding received: \_\_\_\_\_

Also, did you submit the required "Post Project Evaluation" form? Yes ☐ No ☐

2. Do you currently support the Southwestern College Foundation? Yes ☒ No ☐

("support" is defined as contributions of time, talent or treasury)

Please describe the type of support that you provide to the Southwestern College Foundation:

Monthly payroll deduction.

**PLEASE NOTE:**

Post Project Evaluations must be completed and submitted to SWCF within 30 days after project is concluded. **Future funding requests will NOT be considered if the Post Project Evaluation form is not submitted in compliance with this requirement (see next page).**

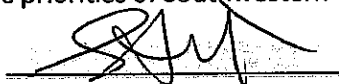
**REQUIRED COLLEGE SIGNATURES**

Name of Applicant (please print) Lourdes Sevilla

Telephone: 619 216-6756

Email: lsevilla@swccd.edu

Signature of Dean, Director or Vice President indicates that the proposed activity is approved and in alignment with the strategic priorities of Southwestern College.



2-7-14

Dean, Director or Vice President (signature required)

Date

**SWC FOUNDATION APPLICATION REVIEW PROCESS AND DETERMINATION (for SWCF use only)**

Approved: Yes ☐ No ☐

Amount: \$ 500

Review Date: \_\_\_\_\_

Notification Date: \_\_\_\_\_

SWCF Authority: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Notes: \_\_\_\_\_



## REQUEST FOR FUNDS APPLICATION

TO SOUTHWESTERN COLLEGE FOUNDATION

February 4, 2014

Higher Education Center at Otay Mesa

# Southwestern College

## Higher Education Center at Otay Mesa

### Sixth Annual Open House

#### Project Description

The main purpose of this event it is to outreach to our neighboring feeder schools. The HECOM Open House offers the opportunity to showcase the signature programs at the Center and to disseminate information among future students about Southwestern College education programs. Also, other services available to students are highlighted and promoted; such as disabled student services, tutorial and academic enrichment programs. During the Open House, workshops on these services are available to our visiting and our current students.

The event will be held on Tuesday, April 29 from 10 a.m. to 1:30 p.m. The visit is planned as an interactive day where students can visit the state-of-the-art facilities, library resources, fire science, nursing, emergency medical technology, and police science demonstrations. Student services offices such as Financial

Aid, EOPS, Counseling, Disabled Student Services, and others are invited to have display booths. Last spring, the HECOM Center staff and faculty welcomed 600+ students from our feeder schools and the San Diego Unified School District. Also, Southwestern College Administrators, Staff, and Counselors, as well as some Governing Board members joined the Open House.

A lunch consisting of salad and pizza will be served to students. Current and visiting students completing an evaluation survey of the event will be qualified to enter a giveaway which consists of (2) iPods, movie tickets, Jamba Juice gift cards, and other donations. Enclosed are last year's program and tentative budget for this year. I thank you in advance for your assistance.

# HIGHER EDUCATION CENTER AT OTAY MESA

## *Proposed Budget*

### **Give Aways**

Movie Tickets (4)	50
Jamba Juice cards (5) \$10 each	50
iPod Shuffle (2)	125
<b>Subtotal:</b>	<b>225</b>

### **Decorations**

Balloons/Helium	50
Raffle tickets roll	10
Ribbon	10
<b>Subtotal:</b>	<b>70</b>

### **Music**

Mariachi	150
<b>Subtotal:</b>	<b>150</b>

**Total:** **2425**

Other incidentals: 125

**Grand Total:** **2550**

### **Food**

Pizzas and Salad	1724
Continental Breakfast	100
Water	156
<b>Subtotal:</b>	<b>1980</b>

### **Funding sources approached:**

<i>Chicano Latino Coalition</i>	\$150
<i>Associated Students Organization (ASO)</i>	\$1,500
<i>HECOM</i>	\$400
<i>Southwestern College Foundation</i>	\$500
<b>*Total monies requested:</b>	<b>\$2,550</b>

**\*Monies not spent will be returned to funding sources.**



5<sup>th</sup>  
Annual

**Southwestern College**  
Higher Education Center at Olay Mesa  
Tuesday, April 30, 2013  
10 a.m. to 2 p.m.

- EMT/Paramedic
- Environmental Hazardous Materials Technology
- Nursing
- Police Academy
- Fire Science Technology
- International Business
- International Logistics and Transportation
- International Logistics and Transportation
- Community, Economic and Urban Development
- Leadership Supervision
- Insurance
- Payroll Clerk
- Travel and Tourism
- Career and Technical Programs
- General Education
- Transfer Courses

Join us for a day of  
discovery and fun!


*Music*

*Food*

*Access to state-of-the-art facilities*


*Workshops*

*Give away prizes*



Free Event — Open to the Public

8100 Gigantic Street, San Diego, CA 92154  
(619) 216-6750

An ASO Co-sponsored Activity 

## Example of last year's flyer

This event is open to all SWC campuses. It provides an opportunity to have first-hand experience of programs and services available at the Higher Education Center at Olay Mesa. Also, Student clubs are given the opportunity to fundraise and meet potential students interested in joining in the fall 2014. ASO can promote their services and spark interest in student government at HECOM.



## HIGHER EDUCATION CENTER AT OTAY MESA

**LOURDES SEVILLA**  
Center Supervisor

18100 Gigantic Street  
San Diego, CA 92154

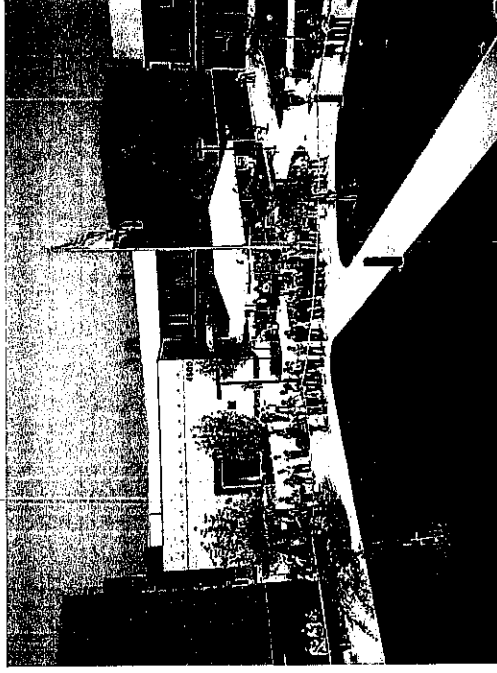
E: lsevilla@swccd.edu  
P: 619-216-6758  
M: 619-495-8203

## Special Thanks

<i>Silvia Cornejo, Dean, HECOM and HECSY</i>	<i>HECOM Faculty, Classified Professionals, Student Workers, Students and Volunteers</i>
<i>Cathy McJannet, Director of Nursing and Health Occupations Programs</i>	<i>Chief Manuel Rodriguez, National City Police Department</i>
<i>Devin Price, Director of Paramedic Program</i>	<i>Lt. David Espiritu, National City Police Department</i>
<i>James Davis, Director of Police Academy</i>	<i>Angel Montalvo, ASO Senator</i>
<i>Sany Ramirez, HASPI Counselor</i>	<i>Chula Vista Fire Department</i>
<i>Ronald Unger, EMT Program Coordinator</i>	<i>Chula Vista Fire Explorers</i>
<i>Kenneth Roof, Fire Science Program Coordinator</i>	<i>American Medical Response</i>
<i>Kurt Bidinger, Fire Science Technology Faculty</i>	<i>Laura Arana, Financial Aid Technician, HECSY</i>
<i>Omar Orihuela, EOPS Supervisor</i>	<i>Mariachi Garibaldi</i>
<i>Marie Vicario, EHMT Program Faculty</i>	<i>Jeff Nevin, Professor of Music</i>
<i>Felipe Ballon, Counselor</i>	<i>Facilities Department Staff</i>
<i>Tony McGee, Librarian</i>	<i>Robert Valerio, DSS Technician</i>
<i>Maria Elena Solis, Counselor</i>	<i>Oswaldo Amezcua, Counselor, HECSY</i>
<i>Lourdes Sevilla, Center Supervisor</i>	<i>Monica Rosas, CITD</i>
<i>Barbara Sedgwick-Billimoria, CITD Counselor and Grant Coordinator</i>	<i>Diana Barajas &amp; Sonia Lira, HASPI-Health and Science Pipeline Initiative</i>
<i>Sean O'Bryen, Paramedic Instructional Lab Coordinator</i>	<i>Julie Swanson, Student Employment Services Specialist</i>
<i>Higher Education Center at San Ysidro</i>	<i>Hawaiian Dance Troop</i>
<i>Higher Education Center at National City</i>	<i>Latin American Dance Performers</i>

## Sponsors

<i>Associated Student Organization (ASO)</i>	<i>Chicano Latino Coalition of Southwestern College</i>
<i>Radio Latina</i>	<i>Starbucks Coffee, Otay Mesa</i>
<i>Icanaffordcollege.com</i>	



# Higher Education Center at Otay Mesa

presents its

## *Fifth Annual Open House*

Tuesday, April 30, 2013

8100 Gigantic Street  
San Diego, California 92154

This event is sponsored in part by  
the Associated Student Organization







# Higher Education Center at Oray Mesa

## Information Tables/Programs and Services

Administrative and Legal Office Assistant, Bilingual	Fire Science Technology
Center for International Trade Development	Insurance
Career Technical Education (CTE)	International Business
Chula Vista Fire Explorers	Leadership and Supervision
Community, Economic and Urban Development	Legal Interpretation and Translation
Counseling & Personal Wellness Services	Library
Crown Cove Aquatic Center	Logistics and Transportation
Disability Support Services (DSS)	Medical Assistant
Emergency Medical Technology and Paramedic	Nursing and Health Occupations
English as a Second Language	Outreach (High School Student Admission)
Environmental Hazardous Materials Technology	Police Academy (Law Enforcement Training)
Extended Opportunity Program and Services (EOPS)	Student Employment Services
Financial Aid	Travel and Tourism

Workshops	Time	Location
Now in College, What's Next? Maria Elena Solis	10:30 AM—11 AM	Room 4418
How to Fund Your College Education! Laura Arana	10:30 AM—11 AM & 11 AM—11:30 AM	Room 4312
Learn About Fire Science Technology Kevin Roof	11 AM—11:30 AM	Room 4414
Careers in Public Safety/Police Academy James Davis	11:30 AM—12 PM	Room 4302
How to Prepare for a Career in Nursing Cathy McClannet and Sany Ramirez	10:30 AM—10:45 AM & 1 PM—1:15 PM	Room 4403

Attention Student! For each workshop you attend, you will receive an additional raffle ticket and the opportunity to win more prizes! Submit tickets at raffle table next to the stage. Limited seats.

© PRIZES: IPOD SHUFFLES, MOVIE TICKETS, GIFT CARDS, BACKPACKS, & T-SHIRTS!

## LUNCH

FREE Student Lunch: Pizza, Salad, Fruit & Veggies (Sponsored by the ASO)	Noon—1:30 PM	4500 Building
FREE Exhibitor, HS Teachers, and Volunteers Lunch	Noon—1 PM	Room: 4102 Inside 4100 Bldg.
ADN Club Food Sale: Snacks and Drinks	10 AM—2 PM	In front of Room 4405
Architecture Club Food Sale: Carne Asada	10 AM—2 PM	Next to 4200 Bldg.
LVN Club Food Sale: Nachos and Lumpias	10 AM—2 PM	In front of Room 4405
Fire Science Club Food Sale: Hot Dogs	10 AM—2 PM	North Side of 4100 Building

# ACTIVITIES and EXHIBITS

Demonstrations	Time	Location
Fire Fighter Physical Training Test	10 AM—11:30 AM	Grass area across from Room 4413
CVFD Heavy Rescue Fire Rig	10 AM—Noon	Behind Room 4414
American Medical Response Ambulance	10 AM—1 PM	In front of 4100 Building
CARE Ambulance	10 AM—1 PM	In front of 4100 Building
EMT/Paramedic Simulator	10 AM—1:30 PM	Room 4411
Nursing Simulation Lab	10 AM—1:30 PM	Room 4417
Nursing Skills Lab	10 AM—1:30 PM	Room 4402
Nursing Operating Room Lab	10 AM—1:30 PM	Room 4416
Police Academy: Firearms Training Simulator	10 AM—1:30 PM	Room 4313
Police Academy: SWAT Static Simulator	10 AM—1:30 PM	Room 4314
Find a copy of the Newspaper of the Day You Were Born!	10 AM—1:30 PM	Library: 2nd floor of 4200 Bldg.
SWC Fire Science Program Fire Truck	10 AM—1:30 PM	Student Parking Lot
Police Academy: NCPD Mobile Command Center	10 AM—1:30 PM	Faculty/Staff Parking Lot Behind 4100 Bldg.
Police Academy: K-9 Officer Demonstration	11 AM—Noon	Grass area by 4300 Bldg.
Fire Fighter Physical Ability Course	11:30 AM—12:15 PM	North Side of Student Parking Lot
LSI: Olaj Mesa Lab Science Investigation	10 AM—1 PM	Room 4419
Cadaver Room Demo	1 PM—2 PM	Room 4420

## PERFORMANCES and ENTERTAINMENT

Hawaiian Dance Troup	11 AM—11:30 AM	Courtyard Stage
Latin American Dance	11:30 AM—Noon	Courtyard Stage
Mariachi Garibaldi	1:15 PM—2 PM	Courtyard Stage
Radio Latina	10 AM—2 PM	Next to Stage

## SOUTHWESTERN COLLEGE FOUNDATION

### Establishing and Administering a Foundation Program/Special Project Account

The purpose of establishing a Southwestern College Foundation (SWCF) program/special project account is to benefit students and the learning environment of Southwestern College. Any portion of a Foundation program/special project account may not be used for personal use, or directly or indirectly for political purposes.

The initial deposit must be a minimum of \$100. To make a deposit, use the Southwestern College Foundation deposit slip. To withdraw funds, use a Southwestern College Foundation Disbursement Check Request form. Only an authorized signer can sign the withdrawal form. Complete this form and bring it along with your initial deposit to the SWCF Office (room 103A).

**Please complete the following:**

**Name of your Foundation Program/Special Project Account:** \_\_\_\_\_

**Print name(s) of Project Director (PD)/authorized signers (only one name is required):**

**Name:** \_\_\_\_\_

**Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Mailing Address:** \_\_\_\_\_

**Phone # and Email:** \_\_\_\_\_

**Phone # and Email:** \_\_\_\_\_

**Purpose of Foundation Program/Special Project Account (please include alignment with SWC Strategic Plan):**

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By signing below, you are confirming that you have read, understand and agree to accept and follow the policies provided. By signing below, you are confirming that information provided on this form is accurate to the best of your knowledge.

\_\_\_\_\_  
PD/Authorized Signer's Signature

\_\_\_\_\_  
College Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Dean/VP Signature (if applicable)

\_\_\_\_\_  
College Title

\_\_\_\_\_  
Date

For Southwestern College Foundation Use Only

Date Reviewed by Executive Director: \_\_\_\_\_

Date Approved by SWCF: \_\_\_\_\_

Program Account Number: \_\_\_\_\_

## SOUTHWESTERN COLLEGE FOUNDATION ADMINISTRATION OF PROGRAM / SPECIAL PROJECTS ACCOUNTS

---

### **SWCF Policy**

In order to accept donations in support of Southwestern College programs, services and special projects, the Southwestern College Foundation (SWCF) has agreed to establish departmental and special project accounts that exist for the purpose of supporting such endeavors. The overall purpose of establishing a Southwestern College Foundation program/special projects account is to benefit the students and learning environment of Southwestern College. No portion of a Foundation account may be used for personal or political purposes. Other restrictions may apply.

### **Scope**

This procedure shall apply to the use of funds contained within District departments/programs and College-related organizations that are designated as a SWCF Program Account/Special Project.

### **SWCF Procedures**

#### **1.0 Establish a program and/or special project account with SWCF.**

- 1.1 The SWCF Program and/or Special Project Account application must be completed by the Project Director (PD)/Authorized Signer. It must be submitted for review to the Executive Director of the Foundation with an initial deposit of at least \$100.
- 1.2 The Executive Director will submit the application to the Southwestern College Foundation for approval to establish an account.
- 1.3 The Executive Director will submit the approved application to the Foundation's Accountant, who will establish the account with a specific fund number.
- 1.4 All program/special project accounts will be given designated codes and funds will be deposited into a primary Foundation pooled checking or short-term account. Any exception must be approved by the Foundation Finance Committee.
- 1.5 The application must state who the Project Director/Authorized Signers are and the purpose of the account. The Foundation must be notified of any change in signers.
- 1.6 Interest is not paid on any program/special project account unless specifically authorized by the Foundation Finance Committee.
- 1.7 A set-up fee may be charged when an account is established and in some cases a management fee may be assessed. Refer to the Program Account/Special Project Agreement for specifics.

#### **2.0 Withdrawing Funds/Making Purchases/Disbursement of Funds**

- 2.1 In order to withdraw funds, the Disbursement Check Request Form must be completed and signed by the PD/Authorized Signer. The PD/Authorized Signer is responsible for ensuring that purchases are made in a manner that is consistent with the guidelines and procedures for quality and fairness as designated by the Business and Financial Affairs Division of Southwestern College.
- 2.2 The Project Director is also responsible for ensuring that no employee or employee family member receives preferential treatment on purchases. By signature, the PD also states that no gratuity, favor or other exchange of goods took place with the supplier.
- 2.3 The form should be sent to the Foundation Accountant for verification of funds availability and the expenditure's conformity with the purpose of the account.

- 2.4 The Executive Director will approve the disbursement after the Accountant has verified that funds are available and that the forms are signed by the proper signer.
- 2.5 The information is entered into the accounting program and the funds are withdrawn.
- 2.6 Checks will be written and disbursements made once a week. Project Directors must allow a minimum of five business days for checks to be prepared.
- 2.7 The Check Disbursement Request Form is stamped with the check number and disbursement date.
- 2.8 The funds are disbursed as requested (either mailed to the vendor or given to the requestor).

### **3.0 Depositing Funds**

- 3.1 Funds deposited to program/special accounts should be clearly designated as donations, material fees or other designated funds.
- 3.2 Coding for special projects can be established for authorized account holders. This must be discussed and approved by the Executive Director. An example includes special fund raising campaigns for capital projects.

### **4.0 Closing Accounts**

- 4.1 If an account balance falls below \$100, the Project Director will be notified and given 30 days to review the account. Ongoing accounts that periodically fluctuate for valid reasons are exempt, e.g. scholarships that are funded annually, seasonal athletic accounts, etc.
- 4.2 If the Project Director determines that the account should be closed, notice is sent to the Foundation and funds are absorbed into the Foundation unrestricted funds account.
- 4.3 In order to keep the account open, the balance must be increased to more than \$100 within the 30 day grace period.

For Southwestern College Foundation Use Only

SWCF Approval Date:

Last Revision:



**Southwestern College Foundation  
Program Account/Special Project Agreement & Check Disbursement Request**

This agreement is used to authorize the establishment of a project for solicitation of general donations and other non-grant/contract funds for Southwestern College and/or department/unit projects. This agreement is not to be used for submission of proposals that will result in the receipt of a grant or contract, or to establish a project that is endowment related. *Please refer to SWCF Establishing & Administering a Program/Special Project Account which details the policy and procedures of designated program funds within the Southwestern College Foundation.*

Program Account/Project Number: \_\_\_\_\_ New Account/ Project \_\_\_\_\_ or \_\_\_\_\_ Update of Existing Account/Project

Project Director \_\_\_\_\_ Director's Title \_\_\_\_\_

Project Title: \_\_\_\_\_

College Department/Unit/Program: \_\_\_\_\_ Project Period: \_\_\_\_\_

**Type of Project**

\_\_\_\_ Fund Raising Campaign (holding account)

\_\_\_\_ Capital Improvement

\_\_\_\_ Foundation Program

\_\_\_\_ Scholarship (non-endowment related)

**Purpose/Goal of Project** *(state the objective of this project and its alignment with SWC's Strategic Plan)*

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**Benefit of Project** *(Define or explain how this project will benefit Southwestern College)* \_\_\_\_\_

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**Source of Funding**

- ☐ Gifts and Donations-please provide a description of the types of donors that will be solicited (i.e. community, business, corporations, private individuals) that will be solicited and the methodology that will be used.

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- ☐ Fees

- ☐ Sales (identify type) \_\_\_\_\_

- ☐ Other (please specify) \_\_\_\_\_

**Attachments/Documentation**

Please attach documentation that is pertinent to the fundraising approach and the operations of the project such as any type of correspondence between SWC and any donors or sponsors regarding fundraising/marketing materials as well as the operation of the project (i.e. contracts, MOUs). This documentation must be provided and placed in program account/special project files for the auditors to review.

**Nature of Anticipated Expenditures** (check all appropriate areas to identify expenditures for this account)

<input type="checkbox"/> Payroll/benefits	<input type="checkbox"/> Consultant/contract services	<input type="checkbox"/> Rent/Utility/Telephone
<input type="checkbox"/> Scholarships	<input type="checkbox"/> Conference/Workshops/Seminars	<input type="checkbox"/> Supplies/Operating Expenses
<input type="checkbox"/> Entertaining	<input type="checkbox"/> Equipment/Maintenance	<input type="checkbox"/> Travel
<input type="checkbox"/> Room rental/Banquet/Catering	<input type="checkbox"/> Other	

The Project Director (PD) assures that all funds expended on this project will be for the purposes described above. Southwestern College Foundation agrees to monitor and enforce these actions. In the event that the project terminates, the property may be transferred to Southwestern College subject to existing procedures for transfer, unless existing restrictions prohibit transfer. The SWCF will issue monthly project reports to the PD via emails for the purpose of financial reconciliation of the program account. The PD should notify the SWCF within 30 days if there are discrepancies in the monthly report; if no objections are received, the reports are deemed to be correct. This agreement will be reviewed every five years or the end of the project period, whichever is earlier. Update notification will be distributed to the PD via email. The PD is the authorized signer for this project/program account. The PD certifies that expenditures are in compliance with the educational mission of SWC and the policies of SWCF. The PD agrees to comply with any and all SWCF policies and procedures and/or directives as they apply to the project/program account covered by this agreement.

I have read this agreement and agree to the conditions and terms herein.

Project Director's signature: \_\_\_\_\_ Date: \_\_\_\_\_

Reviewed and Approved by:

\_\_\_\_\_  
Appropriate Departmental/Unit Administrator

Date: \_\_\_\_\_

\_\_\_\_\_  
Southwestern College Superintendent/President (if applicable)

Date: \_\_\_\_\_

**For Southwestern College Foundation Use Only**

Date Received by SWCF: _____	Date Reviewed by SWCF Board: _____
Date Reviewed by SWCF Executive Director: _____	Status of Review by SWCF Board: _____

After completion and appropriate signatures are obtained please forward the signed original to the Southwestern College Foundation, Southwestern College's Office of Institutional Effectiveness, 900 Otay Lakes Road, Room 103A, Chula Vista, CA 91910. (619) 482-6426

## **Completion Procedures and Instructions for Program Account/Special Project Agreement Form**

Please read these completion procedures for the Program Account/Special Project Agreement Form before filling out the document; especially the details regarding responsibility of the Project Director. This is a binding contract between the Project Director (PD), Southwestern College Foundation (SWCF or the Foundation), and the donor (if applicable). The following procedures will help you to fill out this form completely, with the most useful information, in an efficient manner. Please know that this form is used for many different kinds of Foundation sponsored projects. If you have more precise information (i.e. wills, donor restrictions, board authorization or criteria) please attach them. The more information that the Foundation has about your program account/special project, the better we can serve you.

### ***Program Account/Special Project Number***

- This is determined by the Foundation. After the agreement has been approved and returned to the Foundation, a number is given to the account or project. A copy of the agreement, with the project number recorded on it, is returned to the Project Director and the Foundation Executive Director once the set-up is completed.

### ***New/Update***

- If this is a new program account or special project put an X in the box next to New. If this is an update of an existing program account or special project put an X in the box next to Update.

### ***Project Director (PD)***

- The PD is the designated fund operator and is considered the authorized signature. He/she must be an employee of Southwestern College or the Foundation.

### ***Project Director Title***

- Please print or type the PD's official title. In the event that the PD transfers, leaves or resigns from the College, the Foundation should be notified in writing by completing an update of this agreement within one month with the new Director's name, title and signature.

### ***Program Account/Special Project Title***

- The program account/special project title is used to further identify the project. It should define whom the project serves, what school or program the project serves and what the project type is in a concise manner.

### ***College***

- Southwestern College will receive the benefit of this program account/special project.

### ***Department/Program/Unit/Service***

- A department/program/unit/service within Southwestern College.

### ***Project Period***

- The project period starts whenever the PD deposits solicited funds with the Foundation. The project may be authorized for no more than five years. After five years, the project will be reviewed and updated or closed.

### ***Type of Accounts***

- ❖ **Foundation Program Account/Special Projects** – a program account or special project used to offset expenditures not covered in state budget allocations for use in a department, school, division, unit or program and the source of funds is derived from contributions and donations. This account or project does not earn interest. SWC Foundation charges a 10 % set-up fee when establishing an account (based on the amount deposited when establishing the account). In addition to the set-up fee, a 5% management fee is charged annually on the balance of the fund as of June 30. These fees represent a portion of the cost of doing business and are subject to change.
- ❖ **Project Fund Raising Campaign/Holding** – a project that is initially set up for time-specific fundraising drives initiated by college departments/units/services/programs. Management fees, not to exceed 5%, are charged at the conclusion of the campaign based on total funds raised. This project type does not earn interest.
- ❖ **Scholarship (non-endowment)** – a project where funds are awarded to a student studying at SWC based on the established criteria for that award. A scholarship is defined as an amount paid for the benefit of a student at an accredited educational institution to aid in the pursuit of education. Set-up and management fees are not charged.

- ❖ **Capital Improvement** – this is a holding account ONLY for deposit of major gifts for major building projects, capital improvements of facilities, and start-up costs for furniture and equipment. These gifts are generally administered through the office of the Vice President of Business and Financial Affairs. The project is not charged fees. The project earns interest. If operating expenditures are co-mingled with a Capital Improvement Project, fees will be charged and interest will not accrue. Once disbursement begins, this project will be charged the standard administrative fee and interest will not be earned.

<b>Description of Fees</b>		
<b>Account Type</b>	<b>Set-up Fee *</b>	<b>Management Fee *</b>
Program Acct./Special Project	\$100 for initial deposit under \$1,000 10% for initial deposit \$1,000 and over	Yes, 5% annually as of June 30; Please note: 5% of account balance will be charged if account is closed prior to one year
Fund-raising Campaign	No	5% at conclusion of campaign
Scholarship (non-endowed)	No	No
Capital Improvement	No	No

*\*Please note: The set-up and management fees help to defray costs associated with overhead services such as accounting and compliance oversight.*

**Purpose/Goal of Program Account/Special Project**

- State the objective of the program account or special project. State how the project's activity is compatible with the Strategic Plan and mission of Southwestern College. Please provide any documentation, wills, memos, etc., that are pertinent to the operation of this project. Please check the box for attachments and list and identify them in the space provided.

**Benefit of Program Account/Special Project**

- Define or explain how this program account or special project will benefit Southwestern College. How will this effort enhance the mission of the College?

**Source of Funding**

- Please check the box(es) that are appropriate. If the source of funding is a large donation, please provide as much information about the donor as possible. If the donor is deceased, please provide information on the family or the executor of the will. If there will be small gifts from many donors, please provide a description of the type of donors, whenever possible. Demographic information provided on personal checks will suffice. If the source of funding is sales, please specify what will be sold. If the source is "Fees for Service," please specify what they are for and who will be paying them. If there are other types of income, please be specific about how the funds are provided (i.e. source of funds).

**Nature of Anticipated Expenditures**

- The Foundation has provided 11 major expense account categories that are used to pay disbursements. Please check the box(es) for the types of expenses that the program account/special project will incur. It is advisable not to limit the expendability of the project unless the project is a restricted project type (i.e. scholarship, capital improvement – please read the "Type of Project" descriptions above for restrictions). These expense categories become the basis for determining allowability of expenditures.

**Project Director/Authorized Signature**

- The PD/Authorized Signer must sign and date this agreement before it is sent out for approval. This agreement is a contract between the PD, the Foundation and the donor(s) of the program account or special project. Please be sure all the information on the form is correct, that all attachments are correct and accounted for and all the information printed on this form is understood. If there is any confusion, call the Foundation immediately for assistance at (619) 482-6426.

**Reviewed and Approved By**

- Prior to submitting this agreement to SWCF, the document must be approved by: 1) Project Director; 2) the Appropriate Administrator; 3) the Superintendent/President of Southwestern College (if applicable). Once this agreement has been approved, the program account or special project is set up in the Foundation's electronic system and a copy of the agreement is sent to the PD and the Appropriate Administrator. After the PD has received the completed and approved agreement, he/she can begin using the program account/special project.



**Disbursement Check Request for Program/Special Project Accounts  
Southwestern College Foundation**

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**Payable Information**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Area Code/Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

Social Security Number (last four digits): \_\_\_\_\_ Federal Tax ID # (complete 9 digits): \_\_\_\_\_

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**Project and Disbursement Information**

Project Name: \_\_\_\_\_ SWCF Account Number: \_\_\_\_\_

Amount Requested: \_\_\_\_\_ Distribution Method: \_\_\_\_\_

☐ US Mail

☐ Staff Pick-up-(provide name and extension info. above)

**Justification/Purpose of Expenditure:**

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Requestor's Signature/Title \_\_\_\_\_ Date \_\_\_\_\_

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Authorized Signature/Title \_\_\_\_\_ Date \_\_\_\_\_

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**If payee is the project director, request must be signed by the Project Director's Authorized Administrator**

**For Southwestern College Foundation Use**

Date Received: \_\_\_\_\_

Date of Distribution of Funds: \_\_\_\_\_

Foundation Accountant Approval: \_\_\_\_\_

Executive Director Approval: \_\_\_\_\_