

Plans for Resource Development and Grants >> 2014 - 2015 Resource Development

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2014 - 2015 Resource Development

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Instructions

Please respond to the following questions. Please consult the [Integrated Planning and Program Review Handbook](#) for detailed instructions.

1. Description of Program

Assume the reader doesn't know anything about your program. Please describe your program, including the following:

- a. Organization (including staffing and structure)
- b. Mission, or primary purpose
- c. Whom you serve (including demographics and representativeness of population served)
- d. What kind of services you provide - **Rubric Item:** Describe your [Pattern of Service](#) including alternative modes and schedules of delivery (e.g.: online, hybrid, early morning, evening services).

The Crafton Hills College Office of Resource Development fosters and creates a culture of giving both internally and externally in support of the College's mission and vision. The Resource Development Staff work with volunteer Foundation Directors to promote gifts to support and enhance the quality of education at Crafton Hills College, and thus fulfill the needs of the community served by the college. Gifts are applied to scholarships, to improve the facilities, purchase instructional equipment for vocational and academic enrichment, and to support the students and campus.

The staff is comprised of one full-time Director of Resource Development and Grants and one full-time Assistant Director of Resource Development who are supported by a full-time Administrative Secretary and part-time Account Clerk II. We also employ one short-term hourly project assistant at \$11.00 per hour who works on average 60 hours per month creating marketing and event materials, and one staff writer professional expert at \$20.00 per hour who works less than 20 hours per month to collect Alumni profile stories and connect with and engage successful alumni.

Two staffing changes are affecting the office in 2014-15: 1) In January 2014, the Account Clerk II began an assignment with the Vice President of Instruction to work out of class as his Administrative Assistant while the incumbent was on extended leave. The Assistant Director has assumed responsibility for managing the Foundation budget. The bookkeeping responsibilities of the position have been assumed by an Account Clerk I in the Vice President of Administrative Services office. 2) In September 2014, the Director of Resource Development and Grants began an internship with SBCCD Human Resources. While the Director of Resource Development and Grants is away, the Assistant Director of Resource Development is acting as Director, and institutional grants are being pursued and managed through the Office of Institutional Effectiveness, Research and Planning. Foundation grants continue to be pursued and managed through the Office of Resource Development and Grants.

The ORDG Annual Plan for 2013-14 discussed the additional activities made possible by adding the Assistant Director position: expanded alumni efforts, stewardship, Board development, planned giving, donor/scholar and President's Circle events, and additional activities on campus and in the community. In taking on the Director responsibilities, the Assistant Director adds Foundation grant management, supervision of ORDG staff and student employees, report writing, all Foundation Board development and communication, Foundation budgeting, purchasing and developmental budget, committee work, acting as Executive Director of the Foundation, oversight and planning for the ORDG, and other duties.

The Crafton Hills College Foundation (CHC Foundation) was established in 1973 as a nonprofit, 501(c)3 corporation dedicated to supporting Crafton Hills College. Many of the students who attend might not have an opportunity to pursue a college education due to personal financial limitations or their level of academic achievement. The role of the Foundation is to support the dreams of students so that they can have meaningful and productive lives in their communities and chosen professions. The primary funding source for Crafton Hills College is the state of California; however, community colleges receive the lowest amount of state support of the three College systems. Over the past few decades, foundations have provided critical support to community colleges as state support for these educational institutions has decreased. The CHC Foundation has been instrumental in providing financial support to students and helping to underwrite items or activities at the College that cannot be funded through other means.

The Office of Resource Development (ORD) serves a diverse group of donors, prospective donors, community partners, alumni, foundation board members, students, staff, faculty, and administrators. The Office is responsible for donor relations, developing marketing and communication tools, annual giving, major/planned giving, alumni/donor relations, friend-raising, stewardship, cultivation, grant development and management, direct mail, memberships, public and community outreach, building infrastructure and database management, and special events. ORD staff use College priorities to research funding sources and prospects in response to institutional needs. In addition, the ORD staff work with colleagues across the campus and District to coordinate prospect identification and strategies, and to prepare and submit funding proposals. The ORD's pattern of service meets the needs of our students and College. The ORD reviews the prioritized Program Review list each year to align the needs across campus and search for Foundation grant opportunities to meet those needs.

There are a variety of funding opportunities throughout the year. For students, we offer the emergency textbook loans at the beginning of each semester and Scholarships in the Spring. For the campus, we have infusion funds available to programs year round and those funds are reviewed annually. Any program faculty or staff member may

initiate a request for Infusion funds. President's Circle Innovation mini-grants awarded in the Fall support the engagement, learning, and advancement of students through innovative projects. In May of each year, programs are asked to submit requests for Foundation funds to support projects, activities, and initiatives. Each Spring, we ask the campus for requests where we collect donations through the fund-an-item at the Gala auction raising funds for differing needs.

In addition, certain activities are funded by the Foundation year after year which include:

- Choose a Career / Declare a Major / Career Days
- Roadrunner Rally
- Tea with the Deans
- Senior Day
- Scholars Convocation
- Student Recognition Dinner (May)
- Graduation Breakfast (May)
- Arts Day
- In-service days (August and January)

Also, we have developed an annual calendar to spread out our administrative, communication, cultivation, stewardship, and fundraising efforts throughout the year as follows:

- January: Prepare and send tax letters to donors, preparations for Gala
- February: Establish developmental budget, email to alumni and friends
- March: Provide progress report at Board meeting, Gala
- April: Update President's Circle list, retiree celebration
- May: Prepare Foundation budget for next fiscal year, collect requests for Foundation funds, Give BIG campaign, Scholarship donor wine mixer, speak to Alumni at grad breakfast
- June: Scholarship recipient cards and thank you notes to donors, ORD planning retreat, provide progress report at Board meeting
- July: Submit San Manuel report, close out QuickBooks, prepare for audit, provide update for in-service day
- August: Prepare annual report, email to alumni and friends
- September: Prep annual appeal letter, open President's Circle mini-grant competition, provide progress report at Board meeting
- October: Program review due, send out scholarship renewal/update letters to donors, scholarship donor/recipient reception
- November: Friends luncheon, send annual appeal letter
- December: Provide progress report at Board meeting, send holiday cards to donors / friends, giving Tuesday campaign

Other events such as the Presidential Inauguration and Aquatics Celebration are one-time, coordinated as necessary, and not included in the Annual Calendar. Similarly, campaigns and other activities such as buy-a-brick, Legacy Society, service club meetings, and campus tours are on-going and also therefore not included in the Annual Calendar.

2. External Factors with Significant Impact

What external factors have a significant impact on your program? Please include the following as appropriate:

- a. Budgetary constraints or opportunities
- b. Service area demographics

- c. Requirements of four-year institutions
- d. Requirements of prospective employers
- e. Job market
- f. Developments in the field (both current and future)
- g. Competition from other institutions
- h. Requirements imposed by regulations, policies, standards, and other mandates

Budgetary constraints and opportunities. While the Director of Resource Development and Grants is out on an internship, the Assistant Director of Resource Development and Dean of the Office of Institutional Effectiveness, Research and Planning have divided the responsibilities and a portion of the budget so that the functions of Resource Development and Grants can continue. The ORD is operating on a reduced budget this year with the majority of funds already accounted for due to ongoing and already set costs for contracts, software, and memberships. We are closely monitoring the budget and looking for ways to reduce the fixed costs.

Developments in the field. The ORD has been successful in staying up to date with developments in the field and best practices through professional development trainings and conferences. In addition, the Council for Advancement and Support of Education (CASE) and Council for Resource Development (CRD) listserves are very useful tools to connect with other community college development offices. The Chronicle of Philanthropy highlights trends, ideas, and strategies to strengthen our Fundraising capacity. Historically, community college foundations focused almost exclusively on soliciting contributions toward scholarships and only recently have expanded to include other objectives such as raising funding for equipment, facilities, and classes. There has also been a shift in involving community leaders in college activities, enhancing the image and visibility of the college, and reaching out to Alumni to engage them philanthropically. Community College Presidents are taking a much more active role in the resource development efforts at community colleges. Technology is causing an ongoing transformation in the way we fundraise, market and manage information. Crowdfunding, the practice of funding a project or venture by raising monetary contributions from a large number of people, typically via the internet, and Giving Days, 24-hour online giving campaigns have helped non-profits garner donations that we would not otherwise receive, and often from new supporters. According to the Charitable Giving Report for 2013, overall charitable giving grew 4.9% in 2013, while online giving grew 13.5%.

Competition. Our alumni who transfer to four-year universities have competing loyalty with their alma maters. In contrast with most four-year schools, we are just taking the first steps in finding and reaching out to our alumni as potential donors. Four year universities tend to have larger development staff and budgets and do a better job at engaging alumni upon graduation. Two-year schools averaged \$1.2 million in donations in 2011, compared with \$90 million at research-oriented universities, according to a national survey by the Council for Aid to Education. Less than 1% of community college alumni donate, while nearly 20% do so at four-year colleges, the survey found. According to "How America Gives", a comprehensive study based on charitable deductions claimed by American Taxpayers through the Internal Revenue Service, there is a great capacity in our area. For instance, when we explore philanthropy in Yucaipa, over \$26 million in charitable giving is recorded annually with a median contribution of \$2,988. However, residents of the Inland Empire rely heavily on the nonprofit sector to provide vital services and amenities, from arts programming to health care to youth services, which results in thousands of nonprofit organizations competing for the same donor's support and dollars. When reviewing the 53 filed 990s in 2012 from other

Yucaipa based non-profits, our direct competition in total assets locally includes the Yucaipa Valley Youth Soccer Organization, Yucaipa Valley Animal Placement Society, Wildlands Conservancy, Inland Leaders Charter School, Crafton Hills Open Space Conservancy, and a variety of Churches. We also experience major competition for donors from the University of Redlands, California State University San Bernardino, and San Bernardino Valley College, as well as with national and international organizations such as the American Heart Association, American Cancer Society, and Red Cross. Requirements imposed by regulations, policies, standards, and other mandates. The ORD is responsible for the efficient and accurate fiscal management of Foundation funds; including organizing and documenting the financial affairs and providing appropriate deduction receipts for contributions that meet IRS guidelines. We also ensuring that all legal requirements concerning privacy, confidentiality and privileged information concerning donors and students are adhered to. With the change of staffing in our office, we have developed and implemented a new process with the accounting tasks and responsibilities clearly delineated for recording receipts and making bank deposits to reduce duplication of efforts, minimize the risk of fraud, and improve communication. We abide by the SBCCD Policies and Procedures for Naming and Gift Acceptance, and the by-laws of the Foundation to guide the board in conducting business. The Foundation has established and adopted policies over the past few years which include an investment policy, record retention policy, and President's Circle, Infusion funds, and Krasovec funds spending policies to guide our fundraising efforts and spending procedures. Each year, our Foundation Directors review and sign a Conflict of Interest and Whistleblower agreement, and we engage in an independent audit of our financial statements, activities, cash flows, and functional expenses to ensure compliance.

3. Outcomes Assessment Reporting

Outcomes Assessment Reporting – **Rubric Item:** [Service Area and/or Student Learning Outcomes Process](#). Please use the following tool to report each course or program that was assessed this year, the type of outcome assessed, and the ILO the outcome maps to. In addition, also provide the [Five Column Assessment](#) information in the spaces provided: learning outcomes statement, means of assessment, criteria for success, summary of evidence, and the use of results. If you prefer, the Five Column Assessment information can be attached as a separate document. Additionally, other supporting documents that you wish to include can also be attached to the outcome.

- Program
- **Statement:** Establish and facilitate a more effective foundation board that is aligned with fundraising and college priorities.
Measurement: Board membership and engagement. Tracking Foundation Director's giving history.
Benchmark: Achieve quorum at quarterly Board meetings. Have Board members actively participate in Board meetings and regularly attend Foundation and campus events.
Evidence: Participation in Board retreat; Strategic Plan committee activity. number of new Directors. number of voting members. Two new Directors joined the Foundation Board on September 18, 2014. As an orientation activity, the ADRD invited each new Director to lunch with President Marshall. The Assistant Director continues to meet with Foundation Directors regularly. One new Director from 2013 and one new Director from 2014 joined President Marshall and the ADRD on a campus tour.

Implications: We are using the Board Matrix to track current board members affiliations and contributions. We are in the process of developing an orientation program for new members and new officers. We also need to look at board skills and expectations. We have developed a checklist to identify ways the Foundation Directors can help with Development and Fundraising.

Is Completed: Yes

Is Assessed: Yes

Outcome Type: Sao

ILO Type: SocietyAndCulture

Evidence Files:

- [How CHC Foundation Board Members Can Assist with Raising Funds.pdf](#)
- [Board Matrix 2014.xlsx](#)
- **Statement:** Establish and increase effective planned giving techniques that enable donors and prospective donors to remember the college in their estate plans.
Measurement: Number of planned gifts communicated to ORDG; participation in estate planning activities
Benchmark: The new Legacy Society consists of donors who have remembered Crafton Hills College in their estate plans with a donation of \$10,000 or more. The new Crafton Center will house a Legacy Society wall where members will be recognized.
Evidence: So far, the ORDG has six names for the Legacy Society wall. An Estate planning seminar will be offered in Spring 2015. Foundation Directors are active in planned giving and recommend CHC to clients considering a charitable donation in their estate plan.
Implications: We will be recognizing our donors who leave planned gifts through the new Legacy Society and Legacy Wall in the Crafton Center. We have developed two brochures and will disseminate the information about our Legacy Society to Financial Planners, Certified Public Accountants, and Estate Attorneys.
Is Completed: Yes
Is Assessed: Yes
Outcome Type: Sao
ILO Type: SocietyAndCulture
Evidence Files:
- [Legacy Brochure 6.pdf](#)
- [Legacy Story Brochure 5.pdf](#)
- **Statement:** Establish and increase the culture of giving within the campus community by providing information and processes to increase donor knowledge of how their contributions help our students and college.
Measurement: The number of employees who voluntarily donate funds to the Foundation through payroll deductions has increased in both the number of employees who contribute and the total amount they contribute. Marketing and informational materials are designed and distributed to the campus community on a regular basis.
Benchmark: Payroll giving increases steadily each year. The ORD provides regular communication to campus through conversations, presentations, events, emails, fliers, and on the website regarding the Gala, employee contribution opportunities and use, scholarship donations and application process, and how the Foundation funds are invested in the campus.
Evidence: Tracking the number of employees who give and the amount given through payroll deduction. Marketing materials developed, events, communications with the campus community.

Implications: The efforts of increasing the culture of giving are paying off. We will continue to plant seeds, be accessible, market, and cultivate within the campus community to further our success on behalf of our students.

Is Completed: Yes

Is Assessed: Yes

Outcome Type: Sao

ILO Type: SocietyAndCulture

Evidence Files:

- [Igive.pdf](#)
- **Statement:** Students who receive a scholarship will compose a proper and timely thank you letter for the Donor.
Measurement: Students will receive detailed instructions on how to properly thank their donor at the Scholars Convocation. A deadline and opportunities to get assistance writing the letter at the Tutoring Center are arranged. When letters are received, they are recorded, scanned for guidelines and read for content, and then sent to the scholarship donors. Letters are to be free from grammatical and spelling errors, properly addressed, typed, one-page in length, and have a hand-written signature. Letters will include information about the recipient, their experience as a student at Crafton, plans for the future, and express gratitude for the scholarship.
Benchmark: 90% of scholarship recipients will write a proper thank you letter to their donor. Letters will be submitted on or before the deadline, and will be well written using the criteria set forth in the instructions.
Evidence: For the 133 scholarships awarded, there were only 41 students (31%) who did not write a proper thank you note.
Implications: We were pleased with the results of this SAO. We will revise the instructions and continue to include them with the packets for students. We are only at a 69% participation rate and hope to improve to a 90% rate over the next four years. Students should know how to properly write a thank you letter before they leave Crafton. The scholarship recipients were encouraged to write a note of thanks but many were not written well and a lot of students did not write them at all. I proposed to the Scholarship Committee that we make it a requirement for scholarship recipients to attend a workshop where they hand-write their thank you note on a stationary that I provided before we hand over their check. The Scholarship committee was opposed to the thought of it being mandatory. So this year we included in the scholarship recipient's packet instructions on "How to thank your scholarship donor". We also set up open lab times with the tutoring center to help students compose their letters. The thank you notes that I received were remarkably improved from previous years.
Is Completed: Yes
Is Assessed: Yes
Outcome Type: Slo
ILO Type: WrittenAndOralCommunication
Evidence Files:
- [Scholarship Thank you.docx](#)

4. Progress on SLOs

4. Progress on SAOs – **Rubric Item:** [Service Area and/or Student Learning Outcomes Process](#).

- a. Please summarize the progress your unit has made on SAO measures you have applied since your last program review.
- b. Please describe any improvements made by your unit as a result of the

outcomes assessment process.

c. What is your plan for continuously completing the assessment cycle?

d. If your program has SLOs, please discuss here.

The previous annual plan included five SAOs for the combined office of Resource Development and Grants:

1. 100% of grants pursued through the CHC Grants Office will align with the college's strategic plan.
2. All CHC staff, faculty and managers will be able to utilize the CHC Grants Office.
3. Establish and increase the culture of giving within the campus community by providing information and processes to increase donor knowledge of how their contributions help our students and college.
4. Establish and increase effective planned giving techniques that enable donors and prospective donors to remember the college in their estate plans.
5. Establish and facilitate a more effective foundation board that is aligned with fundraising and college priorities.

SAOs #1-2: Grants

All grants are matched with at least one objective of the Educational Master Plan prior to being submitted. During the 2012-13 and 2013-14 academic years, a Grant Proposal Process was considered by shared governance committees including the Educational Master Plan Committee, Academic Senate, and Crafton Council. The process included opportunities for grants to start from any of three sources: a new program (subject to the existing curriculum process or a New Program process considered in the Educational Master Plan Committee); an innovative idea; or an opportunity that matches annual grant parameters (based on planning and program review priorities). The new process, approved by Crafton Council on November 26, 2013, encourages input from all constituencies and includes mechanisms for alignment with the college's strategic plan.

SAOs #3-5: Resource Development

#3 - Culture of Giving

To measure the culture of giving within the campus community, we assess the number of payroll deductions which has increased to 38 employees who have authorized a total of \$1893.49 in September 2014 from the 28 employees who authorized a total of \$1676.39 in September 2013. We have engaged employees to give to the Foundation through an "iGive" flyer attached. We are in the process of developing additional materials which will better inform the campus of how their support impacts students. We will continue to engage employees and expand the culture of giving.

#4 - Planned Giving

The office has created a Legacy Society and materials to encourage planned gifts. The new Legacy Society consists of donors who have remembered Crafton Hills College in their estate plans with a donation of \$10,000 or more. The new Crafton Center will house a Legacy Society wall where members will be recognized. So far, the ORD has six names for the Legacy Society wall. For 2014-2015, the goal is to add two additional members for a total of eight Legacy Society members. For 2016-2017, the goal is to have a total of 12 Legacy Society members, representing planned gifts of at least \$120,000. We are working with our Foundation Directors who have expertise in estate planning to help us with this process.

#5 - Foundation Board

Engaging Foundation Directors is a work in progress. Our Foundation Directors are volunteers who have a heart for the College and helping students, are willing to give of him/herself, attend quarterly Foundation board meetings, participate in student

functions, and most importantly share the Crafton Hills story with others. The Foundation Board welcomed four new Directors last year, two new Directors this year, and within three years the ORD expects to strategically add another four new Directors. We have revised the agendas to increase dialogue and participation in the monthly Foundation Executive Board meetings and the quarterly Board meetings and we are using campus tours to recruit Board Members. A "How you can help" worksheet was created to help our Directors recognize actions that they can take to make our Fundraising efforts more successful. Attendance and participation has improved, however, we are going to continue to monitor and improve upon our Foundation Director engagement for future cycles. While all Board members are committed to the organization's mission and want the organization to be more successful in realizing its potential. The role of the Board members have been more focused on operations and not the development of resources to support the organization. We are working to shift the expectations toward more fundraising-related activities and advocacy. We have adjusted our SAOs as shown in question 3, and added an SLO. We will continue the assessment cycle for SAOs 3-5 using the existing benchmarks and measurements along with these results to enhance our program and continuously improve.

5. Quantitative and Qualitative Results

Please provide...

- a. **Rubric Item:** At least two quantitative or qualitative measures you have chosen to gauge your [program's effectiveness](#) e.g.: transfers, degrees, certificates, satisfaction, student contacts, students serviced, Perkin's data, etc.
- b. **Rubric Item:** A summary of the results of these measures. Please be sure to set a target and provide the reasoning for the [target](#) that has been set.
- c. What did you learn from your evaluation of these measures, and what improvements have you implemented or do you plan to implement as a result of your analysis of these measures?

External support from Resource Development has shown an overall increase from 2005 to the present. Fundraising grew from \$126,553 in 2005-2006 to \$1,485,423 in 2010-2011, when a planned gift was recorded on the Foundation's annual tax return, the IRS Form 990. Gross receipts dipped for 2011-2012 and recovered in 2012-2013. The amount for 2013-2014 will be finalized when the IRS Form 990 for 2013-2014 is prepared by the Foundation auditor in Fall 2014, but at this time, gross receipts for 2013-2014 are estimated at \$280,509. The Office of Resource Development has set a target of 5% annual growth in fundraising, so that by the 2017-2018 fiscal year the ORD will raise approximately \$340,960 in gross receipts to the CHC Foundation. The President's Circle at Crafton Hills College is a select community of friends of the college who support our mission and vision through annual gifts of \$1,000 or more. This dynamic group plays a vital role in supporting the college, giving the President the flexibility to embrace new ideas and emerging opportunities while meeting the evolving needs of Crafton Hills College. Donors who designate \$1,000 or more toward President's Circle make it possible for the college to strengthen and enhance student learning opportunities, support innovative and promising projects with college faculty, and fund and support the President's vision for the future of the college. All President's Circle members receive invitations to exclusive President's Circle events throughout the year, prominent acknowledgement and listing as a President's Circle member in all appropriate publications, and have their name listed on the Wall of Distinction located in the Learning Resource Center. Last year we had 16 President's Circle members and set

a goal of 20 for 2014-2015. This year (2014-2015), we have exceeded our goal and currently have 21 members. We have set a goal to increase membership to 25 members next year for 2015-2016. We have developed a new form to attract additional members. We are also incorporating recognition of President's Circle Members at the Friends Luncheon and additional stewardship events to encourage membership. We have been including information on joining President's Circle in the materials we give out on our campus tours and have set a long term goal of growing our President's Circle to 100 members, which has been achieved at Victor Valley and COD through cultivation activities similar to what we are employing.

The buy-a-brick campaign is just getting started and we have set a goal of selling 100 bricks at \$250.00 each by May 1, 2015. This would result in an additional \$25,000 in revenue for the Foundation to invest back into the campus next year. In order to reach this goal, we have challenged our Foundation Directors to each sell 4 bricks, we provided an order form to each employee on campus, we are soliciting businesses and service clubs, and we are asking every sub-contractor working on the Crafton Center Project to purchase a brick. To date, we have sold 16 bricks.

The ORD plan developed at the annual retreat on June 10, 2014 lists specific activities to meet the goals and objectives of the CHC Foundation Strategic Plan and annual plan set through the CHC Planning and Program Review process. Therefore, the ORD plan is the basis of the office's action plan for 2014-2015 and beyond. The plan builds upon outcomes from past years in Infrastructure and Relationships.

Infrastructure. Marketing and communication tools were created and distributed, and the website has been updated regularly. For 2014-2015, the ORD is working with the Director of Marketing and our short-term hourly project assistant to update existing and create new marketing materials. For example, Foundation Directors have requested an updated "elevator speech" for their community contacts. The office has also created Legacy Society materials to encourage planned gifts. The new Legacy Society consists of donors who have remembered Crafton Hills College in their estate plans with a donation of \$10,000 or more. The new Crafton Center will house a Legacy Society wall where members will be recognized. The ORD was hoping to identify at least five Legacy gifts in 2013-2014. We have exceeded that goal with six names for the Legacy Society wall. For 2014-2015, the goal is to add four additional members for a total of ten Legacy Society members. By 2017-2018, the goal is to have a total of 20 Legacy Society members, representing planned gifts of at least \$200,000.

In the 2013-2014 fiscal year, the ORD created and implemented a new chart of accounts in Quickbooks to manage its financial information more effectively. The new chart of accounts allows ORD staff to quickly categorize Foundation assets, contributions, expenses, and equity as well as create an annual budget. Foundation Directors approved the first budget using this new system for the 2013-2014 fiscal year, and gross contributions of \$280,509 exceeded the budgeted amount of \$274,154. The 2014-2015 approved Foundation budget set a goal of \$332,300 in contributions. Our financial goal for 2017-2018 is \$340,960. It should be noted that most contributions are designated by the donor for specific purposes such as scholarships and program support. Unrestricted donations for 2013-2014 were \$13,665 and our target is to reach \$20,000 in 2017-2018.

Relationships. During the 2012-2013 and 2013-2014 academic years, ORD staff have sought professional development and implemented strategies to strengthen fundraising. These experiences have reinforced the importance of relationship building, as donors tend to give to organizations with whom they feel a connection. It is difficult to quantify the results of relationship building in terms of dollar amounts, but anecdotal evidence

suggests that all contributions reflect relationships that have been cultivated prior to the donation. The level of community awareness of the needs and impact of Crafton Hills College and Foundation will directly impact our ability to grow our base of philanthropic support. Engaging community leaders, participating in and networking at community events, and bringing the community to campus events will help us grow awareness.

Relationships have been and will continue to be cultivated with Foundation Board members, community members, employees, retirees, students, alumni, and organizations. ORD staff are visible in the community through participation in Rotary, Kiwanis, Chambers of Commerce, Give BIG, and other events and activities. ORD events such as the Friends of CHC luncheon and annual Gala bring in a cadre of established supporters plus their friends. For the 2014-2015 year, the ORD has added a retiree brunch and special events for members of the President's Circle. The ORD is continuing to build alumni support through Facebook, LinkedIn, and a growing Alumni Council. We are also implementing Moves Management, a technique to nurture relationships and strengthen connections with potential donors. For 2014-2015, the ORD is starting Moves Management with a list of 25 prospects with capacity and affinity. At this point, we are just beginning the process of developing a prospect list of a sufficient number of individual, foundation, and corporate major gifts prospects to properly cultivate, solicit, and steward. Relationship building constitutes the bulk of work for the ORD. Through identification, cultivation, solicitation, and stewardship, the ORD create's campus and community awareness and support, and fosters a sound understanding of the College and Foundation's mission and vision.

6. Performance on Data Items

Please discuss your program's performance on each component of the applicable evaluation rubric (The rubric is available in Blackboard, the OIERP Web Site, and in the PPR Handbook). If you have already discussed your programs performance on one or more these components then refer to that response here, rather than repeating it.

a. Non-Instructional Program Effectiveness Evaluation Rubric

i) **Rubric Item:** Describe a significant [innovation or enhancement](#), and the data collected and analyzed that has helped to determine the efficacy of the innovation.

ii) **Rubric Item:** Describe at least 2 external and/or internal [partnerships](#) that substantially impact the quality of services to students or clients.

Innovations and Enhancements.

We consistently seek new ways to engage donors, raise funds, and improve upon what we are doing in the Office of Resource Development and as a Foundation. A few examples include; creating marketing materials, fliers, and brochures, using social media to connect with alumni, revising the auction portion of the gala to include videos, and adding a distinguished alumni award to the gala program. Additionally, we have initiated campus tours to recruit new and engage existing Board Members and donors, revised the Foundation Board of Directors binders to be more useful and friendly, and modified the agendas to increase dialogue and participation in the monthly Foundation Executive Board meetings and the quarterly Board meetings. We have instituted new stewardship events, introduced the "buy a brick" campaign, and we are in the process of establishing a Legacy Society to recognize Donors who have indicated that they are leaving us in their estates. We will be disseminating this information to Financial Planners, Certified Public Accountants, and Estate Attorneys. Last year, the ORD created and implemented a new chart of accounts in Quickbooks to manage its financial

information more effectively. The new chart of accounts allows ORD staff to quickly categorize Foundation assets, contributions, expenses, and equity as well as create an annual budget.

For the past few years, we have been exceeding the amount of scholarship dollars being expended over those being raised. In an effort to reverse this pattern, the stewardship and recognition of our scholarship donors has been a major focus. Last year, a reception to pair scholarship donors with their recipients was implemented. This event is very meaningful to attendees as it gives both parties the opportunity to share; donors share the reason behind the scholarship, and recipients share the impact that the funding had. At the event last year, we received a \$3,000 check from a Donor who was so elated with the opportunity to meet their recipient. Beginning last year, we have also started providing each scholarship donor with the picture of their recipient(s) and information including their major, GPA, goals, and quotes pulled from their applications so that donors feel more of a connection with the students they are helping. This year we hosted a wine mixer prior to the Scholars Convocation for the donors to mingle with each other and feel more engaged with the college. In an effort to increase personal thank you notes from students, we have developed and now provide recipients with instructions on how to properly write a thank you note. This change has resulted in an improvement of quality and quantity of letters received this year to send to our donors. We have solicited new scholarships from corporations and service clubs over the past few years resulting in 5 new \$1,000 scholarships from Southern California Edison for our STEM students, 10 new \$1,000 scholarships from San Manuel, 3 new \$1,000 scholarships from Yucaipa Valley Kiwanis, and there are several others in the works to come online for this year. Scholarship donations are trending upward with the new changes to stewardship efforts. With the increase in scholarships, and a retirement in the next few years of the Assistant to the VP of Student Services who processes the scholarships, we are examining a new software tool to make our system more automated and less labor intensive.

We have enhanced our community outreach in a new and innovative way by arranging for the local service clubs to hold their meetings on campus. The Yucaipa Valley Kiwanis, and Yucaipa Rotary clubs have both had a meeting here, and the Redlands Sunshine Rotary club will hold a meeting on campus in April. This new idea has brought over 100 service-minded and engaged community members to campus. Campus tours, including one with Congressman Paul Cook and another with the San Manuel Band of Mission Indians have been a great tool to help key people connect with the College. External and/or Internal Partnerships. Our partnership with the Santos Manuel band of Mission Indians has been invaluable. This year the Tribe provided our College with funding for Scholarships and student employment on campus. This funding will help to increase student engagement, which encourages students to continue their studies at CHC and reach their educational goals. At a recent visit by representatives, we were told that they would like to visit our campus again before June to discuss the possibility of additional support so that we can grow our student employment program. We also have partnerships with the Children's Fund of San Bernardino County to provide scholarships for emancipated foster youth attending Crafton Hills, the Community College League of California to provide Charitable Gift Annuity Administration and Investment, the Community Foundation to provide scholarships for students and direct Donor Advised funds to Crafton. We also partner with Southern California Edison, Catholic Charities, Yucaipa Valley Kiwanis, Yucaipa Women's Club, Yucaipa Valley Gem & Mineral Society, and Redlands Zonta Club to provide scholarships for our students. Our Partnership with Brandman University has resulted in an exchange of us providing

the names and email addresses in our database and them providing us with "clean" email addresses.

One of the biggest partnerships this year was our participation in the Give BIG campaign that provided a cohesive and collective opportunity for all San Bernardino County nonprofits to raise funds to address the needs in the local community, build the fundraising and social media skills of participating nonprofits, engage new and younger donors to give to their charity of choice, and build civic engagement and the power of philanthropic giving in the community using new and innovative technology channels. Despite the competition from other non-profits, the collaborative groundwork will allow for further efforts going forward.

The Assistant Director and Foundation Directors represent the College and Foundation in the Communities we serve. The ORD regularly attends service club meetings as guest speakers to keep citizens informed about the college. In addition, we regularly attend the Yucaipa, Redlands, and Beaumont Chamber of Commerce activities and events. and the Assistant Director of Resource Development serves on the Yucaipa Calimesa Joint Unified School District Community Cabinet, the City of Yucaipa Comprehensive Economic Development Strategy Committee and the City of Yucaipa Economic Development Advisory Committee.

Internal Relationships are equally important and include working with the bookstore and counseling office to offer textbook loans for students, working with the Vice President of Student Services and her Assistant to process scholarships, working with the Department of Student Life to include students in our activities and events, and working with most departments on campus to provide infusion funds. The ORD works very closely with the President, Vice President's, Deans, and Director of Marketing to coordinate speaking engagements, activities, and events to connect the College with the Community. Partnering with the Vice President of Administrative Services to help manage the foundation accounts and bookkeeping with the Account Clerk I has had a substantial impact on our office. We also partner with the Student Services Department each time we have a campus tour to use their cart.

7. Evaluation

7. Based upon and not repeating the descriptions you provided in Question 1 and the responses provided in Questions 2-6, please provide an analysis of what is going well and why and what is not going well and why, in the following areas.

- Representativeness of population served
- Alternative modes and schedules of delivery (e.g.: online, hybrid, early morning, evening services)
- Partnerships (internal and external)
- Innovation and Implementation of best practices
- Efficiency in operations
- Efficiency in resource use
- Staffing
- Participation in shared governance (e.g., do unit members feel they participate effectively in planning and decision-making?)
- Professional development and training
- Group dynamics (e.g., how well do unit members work together?)
- Compliance with applicable mandates

ORD planning takes place in three ways: through the CHC Planning and Program Review process; through the CHC Foundation Strategic Plan with Foundation Directors; and at an annual planning retreat for our office. College and Foundation priorities drive

the goals and objectives of the ORD plan. We evaluate our effectiveness by tracking progress on the goals and objectives that come through this process.

The ORDG has made a great impact in many areas including direct support for students. Scholarships remain among the most important ways to encourage student success, relieve financial burden, offer inspiration and validate the importance of education. We have steadily increased scholarships for students from \$58,400 to help 87 students in 2010 to over \$80,000 to help 105 students in 2014. Similarly, the cost of textbooks is cited as one of the top reasons students drop out of college. The emergency textbook loan program provides funds for students at Crafton who are at risk for dropping out because they cannot afford their books. This program has provided almost \$74,000 to help 366 students stay in school.

Strong fundraising depends on the proper management of data. The ability to manage data, including accurate reporting of fundraising results, processing and acknowledging gifts, maintaining historical records of donations, and maintaining a proper pipeline of prospective donors, is critical to the future success of the Foundation's fundraising efforts. The accounting software is completely separate from the donor database causing a duplication of efforts. (The Administrative Secretary inputs the donation into Raiser's Edge while the Account Clerk enters the same donation into Quickbooks). The donor data has not been fully utilized to record donor strategy, contact reports, or research findings, which makes accessing historical donor information difficult. The database has over 30,000 records, many of which are not valid constituents. The Raisers Edge Database that we use was originally shared with Valley and includes all of SBVC alumni and donors. The records that do belong to Crafton have not been cleaned and the data has not been entered in a consistent manner. We currently keep spreadsheets for our event invitations and other mailings. It will take time to develop the fundraising systems and best practices that need to be created for the long-term health and sustainability of the Foundation's fundraising programs.

Alumni programming is deficient. The implications are that lifetime alumni engagement leading to lifetime giving is diminished. Alumni are not being given the attention that they should be given, and with the minimal staffing that we have, we are not able to focus the needed attention to make alumni relations work properly. We have been working with the Office of Institutional Effectiveness, Research and Planning to extract the Alumni from Datatel and use SPSS to manage the records rather than waiting until our Raisers Edge database is clean. In doing so, we have found that Alumni from 1972-1980 are on micro film and have not been entered into the College's Database. Records from 1981-2000 which were in a different database are being imported, but we do not yet have access to them. Working with our District Technology Services, we need to outline a plan to get access to those records so that we can reach out to all of our Alumni. When we do have a clean database, we will be able to produce email newsletters and electronic annual reports as a way to engage alumni and the community with potential broad reach without the expense of print and mail. Building the Foundation's database with constituent information, especially of alumni, is a key focus over the next several years.

The ORDG actively promotes and participates in shared governance. The Assistant Director is an active member of the Educational Master Planning Committee, and the Administrative Secretary is a Senator for Classified Senate. In addition, this office is actively involved in the Scholarship, Scholars Convocation, and Commencement committees. We value the inclusiveness of Crafton and were very pleased with the cross-section of employee participation in Foundation activities including; attending the gala, donating to the Give BIG campaign in support of 4.0 scholarships, and the

Presidential Inauguration where 33 faculty, 17 classified staff, and 11 managers walked in the Academic Procession.

Participation in professional development opportunities has had tangible results. For example, the donor/scholar reception, President's Circle events, campus tours, and HEDCO grant were directly related to conferences, trainings, and site visits. These opportunities have helped us establish and put in place best practices that have had favorable outcomes for the College and Foundation. A few of the opportunities the Assistant Director has participated in are listed below:

- CASE Summer Institute in Educational Fundraising July 21 - 25, 2013
- CASE Conference for Community College Advancement October 2 - 4, 2013
- CRD Annual Conference November 5 - 10, 2013
- University of Redlands Community Leadership Program March 27 - May 8, 2014
- The (not-so-secret) Secrets: Building a productive Fundraising Program April 18, 2014
- CRD Boot Camp June 15 - 19, 2014

On October 29, 2013, the Assistant Director spent the day with Jim Hummer, Executive Director of the College of the Desert Foundation, and on April 21, 2014, with Ginger Ontiveros, Executive Director of the Victor Valley College Foundation. These two days shadowing successful professionals at local community colleges were terrific hands-on professional development opportunities. We would like to continue this concept and expand to visit with other local community college professionals. The Administrative Secretary has participated in professional development opportunities offered through the College and is encouraged to seek out additional training opportunities applicable to her job description. Both staff plan to attend the CASE Conference for Community College Advancement in September of 2015.

Strengths and opportunities identified:

- The people - the personnel/staff, College President
- The College - its evolving campus, beautiful site, strong programs
- The partnership between the College and Foundation
- Financial stability of the Foundation
- Successful fundraising efforts such as the Gala and President's Circle
- Outreach to the community
- New space for Foundation office once the Crafton Center and LADM re-model projects are complete

Weaknesses and Threats identified

- Demands on staff
- Limited budget
- Competition from other non-profits
- Lack of focus on Alumni
- Database management
- Board engagement and giving
- Duplication of accounting/donor tracking efforts
- Scholarship process

8. Vision and Mission

a. Tell us your vision: Where would you like your program to be four years from now? Dream big while considering any upcoming changes (e.g.: new buildings, labs, growth, changes in the discipline etc.).

b. **Rubric Item (Alignment):** In what ways does your mission and vision align with and contribute to the college's [mission](#) and [vision](#), as specified in the CHC Educational Master Plan?

The vision of the Crafton Hills College Foundation is to become a major partner in funding educational excellence. The vision of the Office of Resource Development is to advance the College with Foundation funds to support student engagement and educational excellence. This directly aligns with the college's vision; to be the college of choice for students who seek deep learning, personal growth, a supportive community, and a beautiful collegiate setting. When the Foundation becomes a major funding partner, CHC will have the resources necessary to be recognized as the college of choice in our service area, an essential partner and valued asset in our community, and a respected resource for local employers and the workforce.

The mission of the Crafton Hills College Foundation is "Enhancing Educational Excellence". The mission of the Office of Resource Development is to support student engagement, learning, and advancement through funding that enhances educational excellence at Crafton Hills College. The ORD is responsible for connecting the College and the Foundation through alignment of their missions. This office is a link between the community of supporters and needs of the college. We raise, steward, and distribute funds which promote the success of students and the advancement of our community.

9. Progress on Prior Goals

Briefly summarize the progress your unit has made in meeting the goals and objectives identified in your last Four-Year Action Plan.

- **1 - Goal - Increase external support**

Priority Rank:

1

Objectives:

- **1.1 - Objective - Increase financial contributions through fundraising, Board and staff development**

Priority Rank:

1

Original Start Date:

01/18/2013

Original End Date:

06/30/2015

Revised Start Date:

01/18/2013

Revised End Date:

06/30/2015

Responsible Person:

Director/Assistant Director ORDG

Strategic Direction:

8. Effective Resource Use and Development

Impact Type:

-- Pick One --

Resource Requests:

- **1.1.r1 - Passenger cart**

Description

Golf cart for campus tours. The cart should be big enough to seat 6 people.

Rationale

Campus tours will end with a description of CHC activities and needs and an opportunity to join President's Circle.

Resource Type:

One-time

Expenditure Category:

Equipment

Funded:

No

Funding Source:

N/A

First Year Cost/Savings:

\$20,000.00/\$0.00

Actions/Activities:

- **1.1.a1 - Campus tours**

Campus tours will be revamped for Spring 2014 and include a President's Circle ask at the end of the tour.

Start Date:

01/31/2014

Responsible Person:

Director/Assistant Director ORDG

Status Code:

Work is Completed and Ongoing

Progress Description:

A schedule of campus tours was developed for the 2013-14 academic year, and two tours took place as planned for a total of 4 visitors. Another schedule has been developed for the 2014-15 academic year, and the first dates have already been confirmed with visitors. Foundation Directors and SBCCD Trustees were informed of the tour dates and invited to participate.

Measurements/Documentation of Progress:

- **1.1.a2 - Professional development for Board**

Start Date:

02/11/2013

End Date:

06/30/2015

Responsible Person:

Director/Assistant Director ORDG

Status Code:

Work is Underway

Progress Description:

Foundation Board training was held February 5, 2014 and April 18, 2014. The February 5 training was a retreat for CHC Foundation Directors to review their progress against the Foundation Strategic Plan. The April 18 training was a joint training with the SBVC Foundation and the SBCCD Board of Trustees for training from Dr. Francisco Rodriguez, President and Superintendent of Mira Costa Community College. Dr. Rodriguez presented on the topic, "The (not-so-secret) Secrets: Building a Productive Fundraising Program."

The Foundation Strategic Plan is due for revision in 2014. Additional Board development will be needed to create and approve a new plan.

Measurements/Documentation of Progress:

- **1.1.a3 - Professional development for staff**

Start Date:

07/01/2013

End Date:

06/30/2014

Responsible Person:

Director/Assistant Director ORDG

Status Code:

Work is Completed and Ongoing

Progress Description:**Measurements/Documentation of Progress:**

- **1.1.a4 - Estate planning seminar**

Start Date:

02/01/2014

End Date:

02/28/2014

Responsible Person:

Director/Assistant Director ORDG

Status Code:

Objective was Removed

Progress Description:**Measurements/Documentation of Progress:**

- **1.2 - Objective - Re-connect with and engage alumni philanthropically**

Priority Rank:

2

Original Start Date:

01/18/2013

Original End Date:

06/30/2015

Revised Start Date:

01/18/2013

Revised End Date:

06/30/2015

Responsible Person:

Director/Assistant Director ORDG

Strategic Direction:

8. Effective Resource Use and Development

Impact Type:

-- Pick One --

Resource Requests:

- **1.2.r1 - Alumni Coordinator**

Description

An Alumni Coordinator is needed for expansion of alumni engagement efforts.

Rationale

The need for this type of assistance was also included in the most recent program review for the Office of Resource Development (2011-12 academic year). Database cleanup will allow more efficient and effective outreach to alumni and other potential donor groups. A dedicated alumni staffperson will allow expansion by coordinating the Alumni Council, participating in outreach events on campus and in the community, collecting alumni profiles for the website, creating marketing materials, and expanding the College's presence in the community and on social media.

Resource Type:

Ongoing

Expenditure Category:

Personnel

Funded:

No

Funding Source:

N/A

First Year Cost/Savings:

\$45,000.00/\$0.00

Actions/Activities:

- **1.2.a1 - Alumni Coordinator**

An Alumni Coordinator is needed for expansion of alumni engagement efforts. The need for this type of assistance was also included in the most recent program review for the Office of Resource Development (2011-12 academic year). Database cleanup will allow more efficient and effective outreach to alumni and other potential donor groups. A dedicated alumni staffperson will allow expansion by coordinating the Alumni Council, participating in outreach events on campus and in the community, collecting alumni profiles for the website, creating marketing materials, and expanding the College's presence in the community and on social media.

Status Code:

Objective was Removed

Progress Description:**Measurements/Documentation of Progress:**

- **1.2.a2 - Professional development**

Start Date:

02/11/2013

End Date:

06/30/2015

Responsible Person:

Director/Assistant Director ORDG

Status Code:

Work is Completed and Ongoing

Progress Description:**Measurements/Documentation of Progress:**

- **1.3 - Objective - Help project directors and coordinators manage their grants to ensure compliance with federal, state and private funder requirements.**

Help project directors and coordinators manage their grants to ensure compliance with federal, state and private funder requirements.

Priority Rank:

3

Original Start Date:

08/01/2011

Original End Date:

09/30/2015

Revised Start Date:

08/01/2011

Revised End Date:

03/31/2015

Responsible Person:

Karen Childers

Strategic Direction:

8. Effective Resource Use and Development

Impact Type:

-- Pick One --

Resource Requests:

- **1.3.r1 - Grant management software**

Description

Software to manage grant-related tasks including professional development, policies & procedures, proposal writing, pre and post award reports.

Rationale

Software streamlines the grant application and grant management process and improves communication. Helps interested faculty and staff to match their interests to available grants.

Resource Type:

Ongoing

Expenditure Category:

Software

Funded:

Yes

Funding Source:

Title V-HSI grant

First Year Cost/Savings:

\$5,000.00/\$0.00

Second Year Cost/Savings:

\$500.00/\$0.00

Third Year Cost/Savings:

\$500.00/\$0.00

Actions/Activities:

- **1.3.a1 - Grant management software**

Software to manage grant related tasks from request to post-award.

Start Date:

01/06/2014

Responsible Person:

Karen Childers

Status Code:

Work is Completed and Ongoing

Progress Description:

In March 2014, the Title V-HSI grant funded the first year subscription to the Grant Navigator system from American Funding Innovators. Grants and users have been uploaded to Grant Navigator, and the ORDG Director used this system as a dashboard for checking grant status, uploading grant documents, and reviewing due dates for grant reports. The Title V core team was trained on the system. While the ORDG Director is on an internship at SBCCD, the Dean of Institutional Effectiveness, Research and Planning has been trained on the system and will continue to review its effectiveness during the first year.

Measurements/Documentation of Progress:

- **1.3.a2 - Grant Policies & Procedures**

Assemble policies & procedures manual for CHC grant development and management. Utilize existing Board policies, applicable OMB circulars, EDGAR, Title V and HSI-STEM grants, and other relevant source material.

Status Code:

Objective was Removed

Progress Description:

A Grant Submission Process was approved by Crafton Council on November 26, 2013. Policies, procedures, and requirements for each grant are contained in individual RFPs and award notices, which have been provided to the project directors. Project directors of the HSI-STEM and Title V-HSI grants were provided with policies and procedures by the Institutional Development Specialist when the grants were awarded.

Measurements/Documentation of Progress:

- **1.3.a3 - Grant development**

Respond to grant-related inquiries from faculty, staff and managers. Search for grants, write major grant applications, submit grant applications and submit the Grant Approval Request Form prior to submission of grant applications. Monitor grant-related listservs for possible grants.

Status Code:

Work is Completed and Ongoing

Progress Description:

The Director of Resource Development and Grants continues to search for grants, participate in and lead grantwriting teams, submit grant applications, and submit the Grant Approval Request Form. She is a member of several grant listservs. Upon notification of the approval of an internship in Human Resources, the Director worked with the Dean of Institutional Effectiveness, Research and Planning to inform him of useful grant development tools including grantwriting teams and listservs.

Measurements/Documentation of Progress:

- **1.3.a4 - Grant management**

Upon notification of grant award, meet with project directors, project coordinators, or principal investigators to review grant requirements. Support project directors, coordinators and principal investigators by assisting with budget setup and advising on organization of grant records. Consult on the grant as necessary. Participate as a member of grant project steering committees. The Director of Resource Development and Grants should be included in the purchasing approval path for all grants. Build collegial relationships with faculty, staff and management from CHC, SBCCD, and community partners.

Status Code:

Work is Completed and Ongoing

Progress Description:

Measurements/Documentation of Progress:

- **1.4 - Objective - Train faculty and staff on grant development and management.**

Train faculty and staff on grant development and management.

Priority Rank:

4

Original Start Date:

08/01/2011

Original End Date:

06/30/2014

Revised Start Date:

08/01/2011

Revised End Date:

06/30/2014

Responsible Person:

Karen Childers

Strategic Direction:

8. Effective Resource Use and Development

Impact Type:

-- Pick One --

Actions/Activities:

- **1.4.a1 - Training**

Continue to offer training on grantwriting and grant management.

Status Code:

Work is Completed and Ongoing

Progress Description:

The Director of Resource Development and Grants has continued to meet with faculty, staff, and managers for training on grantwriting and grant management.

Measurements/Documentation of Progress:

- **1.5 - Objective - Link CHC priorities to external funding sources.**

Link CHC priorities to external funding sources.

Priority Rank:

5

Original Start Date:

08/01/2011

Original End Date:

09/30/2015

Revised Start Date:

08/01/2011

Revised End Date:

09/30/2015

Responsible Person:

Karen Childers

Strategic Direction:

8. Effective Resource Use and Development

Impact Type:

-- Pick One --

Actions/Activities:

- **1.5.a1 - Informed**

Become informed on needs and wants of CHC faculty, staff and management and link these to external funding sources. Utilize planning documents including the CHC Educational Master Plan and Facilities Master Plan, SBCCD Strategic Plan, and the annual priority list established through Planning and Program Review. Include EMP goals on the Grant Proposal Request Form. Meet with faculty, staff and managers to discuss their interests related to grants.

Status Code:

Work is Completed

Progress Description:**Measurements/Documentation of Progress:**

10. Four-Year Action Plan (Goals, Objectives, Resources, and Actions)

Rubric Item: Reflect on your responses to all the previous questions. Complete the Four-Year Action Plan, entering the specific program goals ([goal rubric](#)) and objectives ([objective rubric](#)) you have formulated to maintain or enhance your strengths, or to address identified weaknesses. Assign an overall priority to each goal and each objective. In addition, enter any actions and/or resources required to achieve each objective. (Click here to see a definition of [goals](#), [objectives](#), [actions](#), and how they [work together](#).)

- **1 - Goal - Increase external support**

Priority Rank:

1

Objectives:

- **1.1 - Objective - Increase financial contributions through President's Circle Membership, Annual Giving, Planned Giving, Sponsorships and Corporate Giving.**

Priority Rank:

1

Start Date:

01/01/2015

End Date:

01/01/2019

Responsible Person:

Director/Assistant Director ORDG

Strategic Direction:

8. Effective Resource Use and Development

Impact Type:

Institutional

Resource Requests:

- **1.1.r1 - Passenger cart**

Description

Golf cart for campus tours. The cart should be big enough to seat 6 people.

Rationale

Campus tours will end with a description of CHC activities and needs and an opportunity to join President's Circle.

Resource Type:

One-time

Expenditure Category:

Equipment

First Year Cost/Savings:

\$20,000.00/\$0.00

Actions/Activities:

- **1.1.a1 - Fundraising and stewardship events**

- Friends Luncheon

- Gala

- Retiree Celebration

- President's Circle Stewardship Events

Start Date:

10/01/2014

End Date:

01/01/2019

Responsible Person:

ADRD

▪ **1.1.a2 - Campus tours**

Campus tours will be revamped for Spring 2014 and include a President's Circle ask at the end of the tour.

Start Date:

01/01/2015

End Date:

01/01/2019

Responsible Person:

Assistant Director

▪ **1.1.a3 - Board engagement**

Professional Development is an ongoing process and will require a plan to engage and keep moving board members forward.

Start Date:

01/01/2015

End Date:

01/01/2019

Responsible Person:

Assistant Director

▪ **1.1.a4 - Legacy society**

We will be identifying donors who have included the CHC Foundation in their estate plans. We will also continue to develop and disseminate information on the Legacy Society to professional Estate Planners, Financial Advisors, CPA's, and Attorneys.

Start Date:

01/01/2015

End Date:

01/01/2019

Responsible Person:

Assistant Director ORD

○ **1.2 - Objective - Re-connect with and engage alumni philanthropically**

Priority Rank:

2

Start Date:

01/18/2013

End Date:

06/30/2015

Responsible Person:

Director/Assistant Director ORDG

Strategic Direction:

8. Effective Resource Use and Development

Impact Type:

Institutional

Resource Requests:

▪ **1.2.r1 - Alumni Database Cleaning**

Description

Use AlumniSync or other reputable company to clean and update data:
Updated mailing addresses, email addresses, last name changes that may have occurred, appending phone numbers, and deceased with date of deceased

Rationale

The first step in re-connecting with Alumni is to be able to reach them. We need to clean our records and locate our alumni in order to engage with them philanthropically.

Resource Type:

One-time

Expenditure Category:

Services

First Year Cost/Savings:

\$25,000.00/\$0.00

Second Year Cost/Savings:

\$5,000.00/\$0.00

Third Year Cost/Savings:

\$5,000.00/\$0.00

Actions/Activities:

- **1.2.a1 - Access missing alumni records**

Alumni records from 1972-1999 are not in our database. We need to develop a plan to access those records.

Start Date:

10/01/2014

End Date:

12/01/2015

Responsible Person:

Assistant Director

- **1.2.a2 - Clean Alumni database**

Maintaining a clean alumni database is an ongoing project and will require resources annually to maintain.

Start Date:

01/01/2015

End Date:

01/01/2019

Responsible Person:

Assistant Director

- **1.2.a3 - Collect Alumni success stories**

We will continue to track our Alumni success stories as a way to engage successful alumni and share our stories in the community.

Start Date:

08/01/2014

End Date:

01/01/2019

Responsible Person:

Assistant Director

- **1.2.a4 - Create Alumni newsletter**

We have designed a newsletter and are in the process of populating the content and getting it ready to send out quarterly. This will be an on-going action to connect with and engage alumni.

Start Date:

01/01/2015

End Date:

01/01/2019

Responsible Person:

Assistant Director

- **2 - Goal - Effectively use resources**

Priority Rank:

2

Objectives:

- **2.1 - Objective - Streamline Scholarship Process**

Priority Rank:

3

Start Date:

01/01/2015

End Date:

06/30/2016

Responsible Person:

Assistant Director ORD

Strategic Direction:

8. Effective Resource Use and Development

Impact Type:

District

Resource Requests:

- **2.1.r1 - Scholarship software**

Description

Potential Scholarship Software Vendors:

- Academic Works
- STARS online
- Next Gen

Rationale

Using an outside vendor to process our scholarships rather than the home-grown system we currently have will help alleviate some of the workload and keep all of our information in one location.

Resource Type:

Ongoing

Expenditure Category:

Software

First Year Cost/Savings:

\$13,600.00/\$0.00

Second Year Cost/Savings:

\$7,500.00/\$0.00

Third Year Cost/Savings:

\$7,500.00/\$0.00

Actions/Activities:

- **2.1.a1 - Update scholarship process**

In discussions on what our needs are, what is working, and what would make the scholarship process less labor intensive and time consuming.

Start Date:

05/01/2015

End Date:

05/01/2016

Responsible Person:

Assistant Director

o **2.2 - Objective - Manage donor information effectively**

Priority Rank:

4

Start Date:

01/01/2015

End Date:

01/01/2019

Responsible Person:

Assistant Director

Strategic Direction:

8. Effective Resource Use and Development

Impact Type:

Department

Resource Requests:

▪ **2.2.r1 - Database management software**

Description

To better manage our donor information, a solution might include using a product such as Donor Perfect online fundraising software

One time fees:

\$2124 System

\$360 Unlimited Concurrent Logins

\$1044 QuickBooks Installed Integration

One time license fees - \$3528

Monthly Fees: \$14.70 Hosting, \$24 Premium Technical Support

\$34.70 per month X 12 months = \$416.40 per year

One Time Fees - With either payment option selected

\$95 Set up Fee

\$1095/day + time and travel expense Onsite Training

Rationale

We currently use Raisers Edge and have a database with over 30,000 records that include Valley constituents and donors. Starting over with a clean database system that integrates well with our financial management software and allows for better reporting, marketing, tracking, and communication will be a great improvement to our office.

Resource Type:

Ongoing

Expenditure Category:

Software

First Year Cost/Savings:

\$3,600.00/\$0.00

Second Year Cost/Savings:

\$500.00/\$0.00

Third Year Cost/Savings:

\$500.00/\$0.00

Actions/Activities:

- **2.2.a1 - Populate new database**
 Hire a student worker to pull the data out of Raisers Edge and import the records into Donor Perfect.
Start Date:
 06/01/2015
End Date:
 06/01/2016
Responsible Person:
 Administrative Secretary
- **2.3 - Objective - Manage financial information effectively**
Priority Rank:
 5
Start Date:
 10/01/2014
End Date:
 01/01/2019
Responsible Person:
 Assistant Director
Strategic Direction:
 8. Effective Resource Use and Development
Impact Type:
 Department
Resource Requests:
- **2.3.r1 - Quickbooks integration with donor perfect**
Description
 DonorPerfect's Accounting Interface Module enables nonprofits to integrate DonorPerfect Online and DonorPerfect Installed with the latest installed versions of QuickBooks® Pro and Premier®.
Rationale
 Benefits:
 Gift transactions are summarized by General Ledger Codes and posted automatically to QuickBooks.
 Saves time and reduces errors by eliminating the need to enter data twice.
 Creates journal entries and transfers transaction detail.
 Use QuickBooks to manage expenses, financial statements and non-donor revenue while benefiting from DonorPerfect's specialized features for managing donor information, gifts and pledges.
Resource Type:
 Ongoing
Expenditure Category:
 Software
First Year Cost/Savings:
 \$350.00/\$0.00
Second Year Cost/Savings:
 \$350.00/\$0.00
Third Year Cost/Savings:
 \$350.00/\$0.00
Actions/Activities:
- **2.3.a1 - Update accounting process and donor data process**

Designed for use with QuickBooks® Pro & Premier, this module provides seamless integration between DonorPerfect™ and the latest versions of QuickBooks. The interface offers organizations greater efficiency by eliminating double entry and allowing DonorPerfect users to take full advantage of the many features available in QuickBooks.

Start Date:

01/01/2015

End Date:

01/01/2016

Responsible Person:

Account Clerk/Administrative Secretary

11. Comments

There are no comments for this plan.

12. Supporting Documents

- [President's Circle Form 6.pdf](#)
- [Campus Tour 2.pdf](#)
- [Strat Plan ADOPTED 09152011.pdf](#)
- [Donor Reception Invite 2.pdf](#)
- [Give Big Poster 2.pdf](#)
- [Inauguration Program.pdf](#)
- [Three Year Plan 082214.pdf](#)
- [Friends Luncheon 2014 Invite 2.pdf](#)
- [Brick Flyer 7.pdf](#)
- [Retiree Brunch 4.pdf](#)
- [ord 2014 Apr 16875 C-Res Dev Olympic Invitation Brochure 03202014 DNC.pdf](#)