[Plans for Resource Development and Community Relations](#) >> 2018 - 2019 Development Office

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Instructions

Please respond to the following questions. Please consult the [Integrated Planning and Program Review Handbook](#) for detailed instructions, the [timeline](#) for due dates, and the [schedule](#) for the four-year plan schedule.

1. Mission

a. Tell us your unit's mission: Provide a mission statement for your unit that clearly and succinctly describes your unit's purpose, idealistic motivations, and change it hopes to inspire.
b. Alignment with the college Mission: **Rubric Item** ([Mission Alignment](#)): The Mission of Crafton Hills College is to advance the educational, career, and personal success of our diverse campus community through engagement and learning. In what ways does your program advance the mission of the college?

> The mission of the Office of Resource Development is to support students and the College through building relationships and soliciting funding that enhances educational excellence.The mission of the Crafton Hills College Foundation is "Enhancing Educational Excellence". The Development Office is responsible for connecting the College with the Foundation and providing a link between the community, supporters, and the college. The Foundation raises, stewards, and distributes funds which promote the success and advancement of our

students. Through community relations, we build partnerships and collaborations so that CHC will have the resources necessary to be recognized as the college of choice in our service area, as an essential partner and valued asset in our community, and as a respected resource for local employers and the workforce.

2. Description of Program

a. Organizational structure and staffing
b. Whom you serve (including demographics and representativeness of population served)
c. Provide a list and a brief description of the services you provide as well as a minimum of three years of trend data for each identified service
d. **Rubric Item**: Describe your [Pattern of Service](#) including standard hours of operation, alternative modes and schedules of delivery (e.g.: online, hybrid, early morning, evening services, etc.) and how that service meets the needs of students or clients

The Crafton Hills College Office of Development creates and fosters a culture of giving both internally and externally in support of the College's mission and vision. The Development staff work with volunteer Foundation Directors to promote gifts that 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 and other direct student support, for vocational and academic program enrichment, and to supplement activities, events, and programs accross campus.

The staff is comprised of one full-time Development Director supported by a full-time Administrative Secretary and part-time Account Clerk II. Our part-time Account Clerk II position has been vacant for the past six months and we will be filling that position officially as of the December 2018 Board Meeting. The 2.5 member team works directly with our 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. The Development Director works very closely with the President of the College and two years ago, the Foundation hired their own planned giving consultant to increase our endowment and focus on planned and major gifts.

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 struggle to pursue a college education due to personal financial limitations. The role of our office 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 our foundation has provided critical support our college.

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.

Other than Fundraising, our office: manages the college scholarship program, is resposbible for community outreach and public relations, event planning, communication with our alumni, community, elected officials, and supporters. We manage over 100 funds that provide financial support for student outreach, engagement, and recognition, employee engagement, and program support for equipment and expenses. We manage the San Manuel grant and relationship which provides employment opportunities for between 30-90 students and solid partnerships with City of Calimesa, City of Yucaipa, City of Redlands, Highland Chamber of Commerce, Yucaipa Chamber of Commerce, Yucaipa Calimesa Joint Unified School District, Yucaipa Valley Water District, etc. The Director serves as a representative for the college in the community at: chambers of commerce, service clubs, education committees, economic development committees, education and workforce councils, etc.

The Foundation provides a variety of funding opportunities throughout the year. For students, we offer textbook loans, emergency grants, food vouchers and scholarships. 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 funds. President's Circle Innovation mini-grants 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, High School Visitation Day, Scholars Convocation, Student Recognition Dinner, Graduation Breakfast, Arts Day, In-service days, etc.

Each year, our annual revenue to the foundation has increased which allows us to infuse more funding back into the college. Our annual contributions for the past five years from our Annual Audits are as follows:

- 2013-2014 - $248,531
- 2014-2015 - $488,885
- 2015-2016 - $710,711
- 2016-2017 - $721,037
- 2017-2018 - $1,063,251

As a direct result, we have been able to increase the number of scholarships awarded as follows:

- 2013-2014 - $59,400
- 2014-2015 - $75,100
- 2015-2016 - $103,375

- 2016-2017 - $122,350
- 2017-2018 - $124,950

The foundation has shifted our focus from funds in, funds out, to raising our endowment so we have the ability to support the college in perpetuity. We have been successful in these efforts with total assests steadily increasing each year.

- 2013-2014 - $2,201,372
- 2014-2015 - $2,281,826
- 2015-2016 - $2,402,685
- 2016-2017 - $2,565,923
- 2017-2018 - $2,879,977

Because of the increase in Financial Contributions, we have been able to enhance student programs and services. Two of our most successful programs provide direct student support and prevent students from dropping out of school. As we know, once students leave us because of financial burden, they are not likely to return and finish their education. Both the Emergency Textbook Loan and Emergency Grant Program have been helpful in making sure students can continue their education. Established by the Foundation in 2004 to help students who are at risk for dropping out of college because they cannot afford the high cost of textbooks, the emergency book loan program has provided over $123,000 to 529 students. Many of our students are under pressure financially to be able to stay in school. An Emergency Support Fund helps them through a critical time as they transition to the rigorous requirements of college life. Funds can be used for food to supplement food stamps, car repairs, temporary housing, utility bills, etc. It can make a difference between staying in school and dropping out.

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

The Development Office is operating on a reduced general fund budget with the majority of funds already accounted for due to ongoing and already set costs for contracts, software, and memberships. We closely monitor the budget and are always looking for ways to reduce fixed costs. As an example, we were able to move to a less expensive donor management software.

The Development Office has been successful in staying up to date with developments in the field and best practices through professional development trainings and conferences. The Council for Advancement and Support of Education (CASE) and Asociation of Fundraising Professionals listserves, websites, and networking opportunities have helped us to connect with other community college development offices. 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.

Much of the focus in our office has been on strengthening relationships internally and externally and there has 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. For many of our regional community colleges, their Presidents take an active role in the development efforts and we are hopeful that our new President will engage with us to continue strengthening our Fundation.

Technology has been transforming the way we fundraise, market and manage information. As an example, crowdfunding- the practice of funding a project or venture by raising monetary contributions from a large number of people, 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 2017, overall charitable giving grew 4.1% in 2017, while online giving grew 12.1%.

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. Colleges and universities raised a total of $43.6 billion in the fiscal year ending June 30, 2017, according to results from the latest version of the annual Voluntary Support of Education survey from the Council for Aid to Education. Alumni giving represented 26.1 percent of total voluntary support of higher education in 2017, up from 24.2 percent the previous year. Alumni relations is about building and sustaining relationships and is vital to the future of development at our institution. We should mirror our four-year counterparts and hire a consultant to develop an alumni engagement plan and explore best practices in handling data management, communications and engagement of our alumni and probable donors.

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 990s 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 Conservancey, 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 Development office 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 ensure that all legal requirements concerning privacy, confidentiality and privileged information concerning donors and students are adhered to. We have clear processes with accounting tasks and responibilities clearly deliniated 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 fund policies in place for all accounts and 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.

4. Progress on Outcomes Assessment

Rubric Item: Service Area and Student Learning Outcomes Process.
a. Please summarize Service Area Outcome (SAO) assessment results. Include a discussion of whether or not the program met its target for each SAO.
b. Please describe any service area improvements you plan to make as a result of the SAO assessment(s).
c. What objective(s) or action step(s) will you add to Question 10 as a result of the SAO assessment(s)? If none, please explain.
d. If your program has SLOs, please address b and c above in relation to the SLO assessment results.

SAO #1: 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.

To measure the culture of giving within the campus community, we assess the number and amounts of payroll deductions.

- 2018 - 49 employees $2392.27 per month
- 2017 - 50 employees $1993.54 per month

- 2016 - 45 employees $1985.68 per month

We have engaged employees to give to the Foundation through an employee giving campaign, developing individual relationships, and increased awareness of the Foundation's impact on the campus. We ask that when activities and events on campus are sponsored by the Foundation, there is a recognition of the gift. We are hopeful that this will better inform the campus of how their support impacts students and the campus. We will continue to engage employees and expand the culture of giving.

SAO #2: Establish and increase effective planned giving techniques that enable donors and prospective donors to remember the college in their estate plans.

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 houses a Legacy Society wall where members will be recognized. In 2017-2018, there were two donors who we had plaques on the wall with three more who had signed gift agreements. Two additional donors are in process of signing gift agreements for a total of 7 Legacy Society Members. For 2018-2019, the goal is to add three additional members for a total of ten Legacy Society members. We are working with our Foundation Directors and the Foundation planned giving consultant to help us with this process. We are offering a Life and Estate Planning Series and have implemented a Planned Giving Advisory Council to engage and build partnerships with local financial planners, attorneys, and tax professionals.

SAO #3: Establish and facilitate a more effective foundation board that is aligned with fundraising and college priorities.

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 personally support the students and college, 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 this year and we will strategically add three additional members to reach our goal of 25. 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. Attendence 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.

5. Unit's Performance on Institutional Quantitative Effectiveness Indicators

Please discuss your program's performance on each data item below.

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 three external and internal partnerships that substantially affect 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 have disseminated information to Financial Planners, Certified Public Accountants, and Estate Attorneys.

Last year, the Development Director partnered with English faculty to make class visits and provide a presentation about the Foundation. This innovation has a multitude of benefits. First, students are made aware of the Foundations programs and services and how they might personally benefit. Second, students learn about non-profit leadership as a possible career path. And, third, students learn how to write a proper hand-written thank you note which in turn helps us to steward our donors in a meaningful way. Students who turn in a thank you note are entered into a drawing to win a gift card. These hand-written notes are very much appreciated by our donors who enjoy hearing from our students.

In 2013, we were 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. An annual reception to pair scholarship donors with their recipients has been 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. We provide 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. We also host a mixer prior to the Scholars Convocation for the donors to mingle with each other and this year we included our faculty and administrators to help them feel more engaged with the each other. 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 to send to our donors. Scholarship donations are trending upward with the new changes to stewardship efforts.

External and/or Internal Partnerships.

Taking community members, alumni, elected officials, service clubs, and educational advocates on personalized tours of the campus has proven to be an engaging activity. Guests enjoy meeting faculty, staff, and students and seeing our beautiful campus on a very personal level. These tours often result in the experience being shared on social media and guests leaving with the ability to be ambassadors for CHC.

Our Friends Luncheon is held each fall as an opportunity to build relationships. This is a succinct one-hour introductory event that educates and inspires guests with facts and an emotional appeal of our organization's work, focusing on overarching areas of impact. We have an alumni and student speak about their Crafton experience and College Leadership provides a "State-of-the-College" address. We have over 100 community leaders, business owners, and alumni attend each year.

The Retiree Brunch is hosted each summer to reunite our retirees with each other and re-engage them with the College. Generally 20-30 retirees and their guests join us for a walking campus tour and brunch to see how the college has grown to serve students while acknowledging the important role they had in creating a culture of academic success and student commitment which continues to flourish today. We have a student speak, each of the retirees share memories, and College Leadership provide information on the year's activities and accomplishments.

We host a friend-raising and fundraising gala each Spring which brings over 200 people to campus and raises over $100,000. Last year, the theme was "Sweet Home Crafton Hills" and we recognized San Manuel as they presented a $303,500 check to support the iSEEK student employment program. Students from that program shared their stories and Redlands firefighter, Steve Leverette, was recognized as the 2018 Distinguished Alumnus. The event includes a silent and live auction as well as a live band.

We have been working with the Fire Academy faculty, staff, alumni, and volunteers to develop a CHC Fire Academy Alumni Association which launched last year. We have had three membership drives and currently have 27 members provide a $50 annual contribution. This group was able to bring to full endowment two scholarships for Fire Academy cadets.

Each year, we give alumni license plate frames to our graduates and the Director speaks at the graduation breakfast to let graduates know about all of the ways the Foundation has supported them in their journey and remind them that when they are in a position to give back, that they think of Crafton. I also tell the story of the Krasovec estate and remind them that they are representing us in all they do. Our Foundation Board and staff often give presentations at and are involved with local service clubs and Chambers of Commerce. As often as possible, we are out in the community along with students to tell our community members about the great things we are doing at Crafton Hills College.

Our partnership with the Santos Manuel Band of Mission Indians has been invaluable. The Wa'at Celebration in partnership with the tribe brings local 3rd and 4th grade students to campus each Spring. We host the event and provide lunch for the tribal members and

volunteers. For the past three years, the tribe has provided our College with funding for Scholarships and student employment on campus. This funding has increased student engagement which has helped students to continue their studies at CHC and reach their educational goals.

We 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, SoCal Gas, Catholic Charities, Yucaipa Valley Kiwanis, Yucaipa Women's Club, Yucaipa Valley Gem & Mineral Society, Redlands Sunrise Rotary, and many others to provide scholarships for our students.

We participate in the Give BIG campaign that provides 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 technology. Despite the competition from other non-profits, the collaborative groundwork allows for us to connect with community leaders and other non-profits for collective impact.

Our newest partnership is with the Community Action Partnership of San Bernardino County (CASPSB). Food insecurity is a problem on our campus and that is why the COACH (Creating Opportunities and Changing Hearts) Project is one of the programs we raise money for each year. Funding for this program provides Meal Vouchers, supports the student Garden, and stocks the Food Pantry – COACH Cupboard. COACH Cupboard provides personal hygiene and nonperishable food items to students experiencing food insecurity. The CASPBC is going to provide monthly deliveries to the Cupboard and we received our first 155 pounds of food in October.

The Development Director represents the College and Foundation in the Communities we serve. The Director regularly attends service club meetings as guest speakers to keep citizens informed about the college. In addition, she regularly attends the Yucaipa, Calimesa, and Beaumont Chamber of Commerce activities and events and serves on the Yucaipa Chamber of Commerce, Yucaipa Valley Kiwanis Club, Yucaipa Calimesa Joint Unified School District Community Cabinet, the City of Yucaipa Economic Development Advisory Committee and the City of Beaumont Economic Development Committee.

The Director also serves on the Joint Issues Committee which includes representatives from City of Calimesa, City of Yucaipa, Yucaipa Calimesa Joint Unified School District, Yucaipa Valley Water District, and the College. This group meets monthly and works collaboratively for the advancement of our community in a more effective and cohesive manner. Since each entity is represented by an elected board, we hosted at Crafton and brought together our elected officials to allow for networking at the highest level as well as an update on the work we have done together. Presenters included: Cali Binks, Superintendent YCJUSD, Ray Casey, City Manager Yucaipa, Bonnie Johnson, City Manager Calimesa, Michelle Riggs, Director Crafton Hills College, and Joseph Zoba, General Manager YVWD

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 prepare for scholars convocation, 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 Development office 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 and partners with the Vice President of Administrative Services to help manage the foundation accounts.

6. Other Unit-Specific Quantitative and Qualitative Results (Administrative Services Only)

a. **Rubric Item**: Define and describe useful quantitative or qualitative measures you have chosen to gauge your program's effectiveness that are in addition to the SAOs from measure 3 (Program Effectiveness Measures). (e.g.: number of transfers, degrees, certificates, student contacts, students serviced, square footage serviced, acres managed, student, faculty, and staff satisfaction, equity data, correlation data on the relationship between program participation and student outcomes, and satisfaction with college facilities) etc.
b. **Rubric Item**: Please be sure to set a target (Program Effectiveness Criteria) for each measure and provide the reasoning for the targets that have been set. 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 over the past decade. The Office of Resource Development has set a target of 5% annual growth in fundraising and to bring the Foundation endowment to 4.5 million by 2025. For 2017-2018, our assets are $2.8 Million, up from $2.5 Million in 2016-2017. In 2017-2018, we raised $1,063,251 and gave out $622,842 in scholarships and other support to the students and college. We met our annual goal of 5% and are on track to meet our endowment goal by 2025.

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. This year, we had 30 members. We had set a goal to increase membership to 25 members for 2017-2018 and met that goal. Our current goal is to maintain the 30 members. 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 which we have modeled.

Relationships. Development 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. Development staff are visible in the community through participation in Rotary, Kiwanis, Chambers of Commerce, Give BIG, and other events and activities. Development events such as the Friends of CHC luncheon and annual Gala bring in a cadre of established supporters plus their friends. Relationship building constitutes the bulk of work for the Development staff. Through identification, cultivation, solicitation, and stewardship, the Development office create's campus and community awareness and support, and fosters a sound understanding of the College and Foundation's mission and vision.

7. Evaluation

You have already provided a description and analysis of the program in questions 1-6, please provide an analysis of what is going well/not well and why, in the following areas:

- Alternative modes and schedules of delivery (e.g.: early morning, evening services, etc.)
- 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

The Development Office 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 Development plan. We evaluate our effectiveness by tracking progress on the goals and objectives that come through this process.

The Development office 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. 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.

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 currently separate from the donor database causing a duplication of efforts. (The Administrative Secretary inputs the donation into Bloomerang (Donor Database) while the Account Clerk enters the same donation into Quickbooks (Financial Database)). The donor database has not been fully utilized to record donor strategy, contact reports, or research findings, which makes accessing historical donor information difficult. We currently keep spreadsheets for our event invitations and other mailings. We have made progress and will continue to improve realizing that 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 worked with the Office of Institutional Efectiveness, Research and Planning to extract the Alumni from Datatel and have moved those records into our donor database. In doing so, we found that the Alumni from 1972-1980 were on micro film and had not been entered into the College's Database. Records from 1981-2000 which were in a different database were imported, but we did not yet have access to them. Our Foundation invested $15,000 to index and clean the alumni records from 1972-2000 and they are in process of being merged into our database. The next step is to hire a consultant to create a plan for us to engage with and develop meaningful relationships with our alumni, which is a key focus over the next several years.

The Development office actively promotes and participates in shared governance. The Director and Administrative Secretary serve on the Educational Master Planning Committee. The Administrative Secretary is the Treasurer for Classified Senate. In addition, this office is responsible for the Scholarship Committee and is actively involved with the Commencement committee. We value the inclusiveness of

Crafton and were very pleased with the cross-section of employee participation in Foundation activities including; attending the gala, and supporting the Give BIG campaign.

Participation in professional development opportunities has had tangible results. For example, the donor/scholar reception, President's Circle events, campus tours, and several grants were directly related to conferences, trainings, and networking opportunities. These opportunities have help us establish and put in place best practices that have had favorable outcomes for the College and Foundation. Pending availability of funding, the Director and Secretary try to attend the CASE Conference for Community College Advancement in October of each year.

Strengths and opportunities identified:

- The people - the Development personnel work well together and with others accross campus and in the community
- 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

Weaknesses and Threats identified

- Inconsistent College Leadership
- Demands on staff
- Limited general fund budget
- Competition from other non-profits
- Lack of focus on Alumni
- Database management
- Board engagement and giving
- Duplication of accounting/donor tracking efforts
- New space for Foundation office is small and has no storage

8. Vision

a. Tell us your unit's Vision: Where would you like your program to be four years from now? Dream big while considering any upcoming changes (e.g.: new buildings, growth, changes to the service area, etc.).

b. Alignment with the college Vision: **Rubric Item** ([Vision Alignment](#)): The Vision of Crafton Hills College is to be the college of choice for students who seek deep learning, personal growth, a supportive community, and a beautiful collegiate setting. **In what ways does your program advance the vision of the college?**

The vision of the Office of Resource Development is to advance the College with Foundation funds to support student access, engagement, success, and educational excellence.The vision of the Crafton Hills College Foundation is to become a major partner in funding educational excellence. These directly align 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.

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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.**
    Priority Rank: 1
    Original Start Date: 07/01/2016 **Original End Date:**   06/30/2019
    Revised Start Date: 07/01/2018 **Revised End Date:**   06/30/2023
    Responsible Person: Director
    Strategic Direction: 9. Optimize Resources
    Impact Type: Site
    Institutional Learning Outcome: -- Pick One --
    Resource Requests:

      - **1.1.r1 - Reorganize Resource Development staffing**

Description

Hire a Resource Development Specialist.

Rationale

Our staffing and the functions of this office have changed substantially over the past few years. Taking over the entire management of Scholarships, overseeing ISEEK student employment, alumni relations, and community relations in addition to our already full plate of Resource Development and overseeing the Foundation is not sustainable. In order for us to reach our goals of increasing financial contributions, we will need to reorganize our staffing to include a RD Specialist.

Resource Type: Ongoing

Expenditure Category: Classified Unit Member Non-Instruction (2181)

Funded: No

Funding Source: General Fund

First Year Cost/Savings: $50,000.00/$0.00

Second Year Cost/Savings: $50,000.00/$0.00

Third Year Cost/Savings: $50,000.00/$0.00

Actions/Activities:

- **1.1.a1 – Fundraising and stewardship events and activities**
  - Friends Luncheon
  - Gala
  - Retiree Celebration
  - President's Circle Stewardship Events
  - Scholarship Reception
  - Scholars Convocation
  - Scholarship Donor Mixer
  - Grand Openings/Unveilings/Naming Ceremonies/Anniversary Celebrations

Start Date: 07/01/2016 **End Date:** 06/30/2019

Responsible Person: Director

Status Code: Work is Completed and Ongoing

Progress Description:

We have completely transformed our fundraising stewardship events and activities over the past three years. This work is going to be ongoing.

Measurements/Documentation of Progress:

Number of events has increased, number of attendees has increased, coverage in local newspapers and President's board reports show substantial progress with successful events.

- **1.1.a2 - Campus tours**

Taking Community Members and donors on personalized tours of the campus has proven to be an engaging activity. Guests enjoy meeting faculty, staff, and students and seeing our beautiful campus on a very personal level. These tours often result in the experience being shared on social media and receiving invitations to speak out in the Community.

Start Date: 07/01/2016 **End Date:** 06/30/2019
Responsible Person: Director
Status Code: Work is Completed and Ongoing
Progress Description:

We will conitinue to invite community members, elected officials, service clubs, alumni, and others to our campus for tours. We work with faculty and staff accross campus to show our tour guests the great things we are doing on campus and send these guests back into the community as ambassadors for our institution.

Measurements/Documentation of Progress:

Number of tour guests, sharing of tours on social media and with their circle of influence

- **1.1.a3 - Board engagement**

Each board member is expected to contribute tehir time, talent, and treasure toward the mission of the Foundation. Engaging board members with clear expectations, an orientation, and professional development opportunities is important to the success of the Foundation.

Start Date: 07/01/2016 **End Date:** 06/30/2019

Responsible Person: Director

Status Code: Work is Underway

Progress Description:

We have a board retreat each September with training on roles and responsibilities of the Directors and an update of who the campus serves. Individual meetings with the Development Director and Board members are scheduled to engage with each person on our board. Our annual December meeting has been moved to one of our Director's homes with a very informal meeting and the addition of an ice breaker activity this year.

Measurements/Documentation of Progress:

Number of board members, activities and meetings attended.

- **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 dissimenate information on the Legacy Society to professional Estate Planners, Financial Advisors, CPA's, and Attorneys.

Start Date: 07/01/2016   **End Date:**   06/30/2019

Responsible Person: Director

Status Code: Work is Underway

Progress Description:

The Foundation has hired a Planned Giving Consultant and we have instituted a Planned Giving Advisory Committee. We are also offering a Life and Estate Planning series.

Measurements/Documentation of Progress:

Number of members in Legacy Society, number of planned giving professionals who serve on advisory board, number of attendees who participate in life and estate planning sessions, ultimately number of gifts received through planned gifts.

- **1.2 - Objective - Re-connect with and engage alumni philanthropically**
  Priority Rank: 4

Original Start Date: 07/01/2016 **Original End Date:** 06/30/2019

Revised Start Date: 07/01/2018 **Revised End Date:** 06/30/2023

Responsible Person: Director

Strategic Direction: 9. Optimize Resources

Impact Type: Site

Institutional Learning Outcome: -- Pick One --

Actions/Activities:

- **1.2.a1 - Communicate with Alumni through newsletter**

  We have indexed and cleaned our alumni datatbase. We also designed a newsletter that we populate with relevant campus information and send out quarterly. This will be an on-going action to connect with and engage alumni.

  Start Date: 07/01/2016 **End Date:** 06/30/2019

  Responsible Person: Director

  Status Code: Work is Underway

  Progress Description:

  We were sporadically sending emails to our alumni and have not had a great response. We need to work with a professional to develop a plan.

  Measurements/Documentation of Progress:

  We will measure number of emails opened, level of engagement, and charitable gifts. The ability to measure this is built into our donor database software.

- **1.2.a2 - Collect Alumni success stories**

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

  Start Date: 07/01/2016 **End Date:** 06/30/2019

  Responsible Person: Director

  Status Code: Work is Underway

  Progress Description:

We were able to collect a few alumni success stories which are posted on our website. We need to work with a professional firm to collect these stories. Each year at the gala, we honor one distinguished alumni and work with our Marketing Director to collect their story.

Measurements/Documentation of Progress:

Number of alumni who share their story.

- **2 - Goal - Effectively use resources**
  Priority Rank: 2
  Objectives:

  - **2.1 - Objective - Streamline Scholarship Process**
    Priority Rank: 3
    Original Start Date: 07/01/2016 **Original End Date:** 06/30/2019
    Revised Start Date: 07/01/2018 **Revised End Date:** 06/30/2023
    Responsible Person: Director
    Strategic Direction: 4. Expand Access
    Impact Type: District Wide
    Institutional Learning Outcome: -- Pick One --
    Resource Requests:

    - **2.1.r1 - Scholarship software**
      Description

      Implement new Scholarship Software - AcademicWorks

      Rationale

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

      Resource Type: Ongoing
      Expenditure Category: Software Leases and Software Licensing (5621)
      Funded: No
      Funding Source: Equity or SSSP?
      First Year Cost/Savings: $7,500.00/$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 - Manage scholarship process**

  Implementing the new scholarship software and managing the entire scholarship process is new to our office. The number of scholarships and amount of scholarships has doubled in the past few years because of the effort from our office. There are grants to write, reporting to submit, and donors to steward if we want to continue on this trejectory. Scholarships remain among the most important ways to help students overcome their financial barriers and celebrate achievements.

  Start Date: 07/01/2016 **End Date:** 06/30/2019
  Responsible Person: Director
  Status Code: Work is Completed and Ongoing
  Progress Description:

  We have instituted a new scholarship management software. We have been able to pay our portion which is approximately $3500 per year through our general fund budget, however, this software alleviates financial barriers for students and promotes access. If it is possible that this software could be paid through student equity or SSSP funding, it would free up some of our general fund dollars for the other goals and priorities of our office.

  Measurements/Documentation of Progress:

  Number of scholarships awarded. Number of students who receive scholarships.

- **2.2 - Objective - Develop employees professionally**
  Priority Rank: 2
  Original Start Date: 07/01/2016 **Original End Date:** 06/30/2019
  Revised Start Date: 07/01/2018 **Revised End Date:** 06/30/2023
  Responsible Person: Director
  Strategic Direction: 8. Support Employee Growth
  Impact Type: District Wide
  Institutional Learning Outcome: -- Pick One --

Status Code: Work is Underway

Progress Description:

We have a very limited professional development budget and our two staff are able to attend one conference each year because we share a room, carpool, and luckily it is local. The CASE conference for community college fundraising is a great resource for us to develop our employees professionally. We would like to be able to take our account clerk next year. We would also benefit from additonal funds to attend additional training and conferences.

Resource Requests:

- **2.2.r1 - Professional Development**
  Description

  Council for Advancement and Support of Education - Conference for Community College Advancement

  Network of California Community College Foundations Conference

  Academy for Grassroots Organizations - Fundraising Academy

  These conferences and trainings provide the opportunity to network with colleagues and learn from their best practices while receiving high quality professional development.

  Rationale

  Good talented people naturally want to advance, and appreciate meaningful support in the process. Our talented staff would like to take advantage of professional development opportunities and attend trainings and conferences related to Resource Development and Community Relations. Specifically, the Director and staff should attend the CASE conference for Community College Advancement. The ongoing costs are worth the investment in your staff and the ability to attend conferences is really important.

  Resource Type: Ongoing
  Expenditure Category: Conference and Travel (5200)
  Funded: No
  Funding Source: Professional Development
  First Year Cost/Savings: $5,000.00/$0.00
  Second Year Cost/Savings: $5,000.00/$0.00

Third Year Cost/Savings: $5,000.00/$0.00

- **2.3 - Objective - Manage donor information effectively**

  Priority Rank: 5

  Original Start Date: 07/01/2016 **Original End Date:**   06/30/2019

  Revised Start Date: 07/01/2018 **Revised End Date:**   06/30/2023

  Responsible Person: Director

  Strategic Direction: 9. Optimize Resources

  Impact Type: Department

  Institutional Learning Outcome: -- Pick One --

  Resource Requests:

  - **2.3.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 Quickbooks. This product integrates the donor management with accounting and allows for better reporting, marketing, tracking, and communication.

Resource Type: Ongoing

Expenditure Category: Software Leases and Software Licensing (5621)

Funded: Yes

Funding Source: Foundation

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:

- **2.3.a1 - Populate new database**

  Extract the data out of Raisers Edge and import the records into Donor Perfect.

  Start Date: 07/01/2016 **End Date:**   06/30/2019

  Responsible Person: Administrative Secretary

  Status Code: Work is Completed and Ongoing

  Progress Description:

  We have moved all of our data from Raisers Edge (RE) to Bloomerang. We are in process of merging our alumni records into Bloomerang.

  Measurements/Documentation of Progress:

  Number of records in new Database. Records have been cleaned and information is current.

- **2.4 - Objective - Manage financial information effectively**

  Priority Rank: 6

  Original Start Date: 07/01/2016 **Original End Date:**   06/30/2019

  Revised Start Date: 07/01/2018 **Revised End Date:**   06/30/2023

  Responsible Person: Director

  Strategic Direction: 9. Optimize Resources

  Impact Type: Department

Institutional Learning Outcome: -- Pick One --
Resource Requests:

- **2.4.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 tranfers 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 Leases and Software Licensing (5621)
  Funded: Yes
  Funding Source: Foundation
  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:

- **2.4.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: 07/01/2016 **End Date:**   06/30/2019
  Responsible Person: Account Clerk/Administrative Secretary

Status Code: Work is Completed and Ongoing

Progress Description:

We moved to Quickbooks online. The Foundation is paying for the software.

Measurements/Documentation of Progress:

New accounting and donor data process.

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. **In writing your objectives and developing your resource requests, take into account student learning and program assessment results.** 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.**
    Priority Rank: 1
    Start Date: 07/01/2018 **End Date:** 06/30/2023
    Responsible Person: Director
    Strategic Direction: 9. Optimize Resources
    Impact Type: Site
    Institutional Learning Outcome: 4. Society and Culture
    Resource Requests:

    - **1.1.r1 - Reorganize Resource Development staffing Description**

      Reclassify staff as Development Coordinator.

Rationale

Our staffing and the functions of this office have changed substantially over the past few years. Taking over the entire management of Scholarships, overseeing iSEEK student employment, alumni relations, and community relations in addition to our already full plate of Resource Development and overseeing the Foundation is not sustainable. In order for us to reach our goals of increasing financial contributions, we will need to reorganize our staffing to include a Development Coordinator.

Resource Type: Ongoing

Expenditure Category: Classified Unit Member Non-Instruction (2181)

First Year Cost/Savings: $50,000.00/$0.00

Second Year Cost/Savings: $50,000.00/$0.00

Third Year Cost/Savings: $50,000.00/$0.00

Actions/Activities:

- **1.1.a1 - Fundraising and stewardship events and activities**
    - Friends Luncheon
    - Gala
    - Retiree Celebration
    - President's Circle Stewardship Events
    - Scholarship Reception
    - Scholars Convocation
    - Scholarship Donor Mixer
    - Grand Openings/Unveilings/Naming Ceremonies/Anniversary Celebrations

  Start Date: 07/01/2018 **End Date:** 06/30/2023

  Responsible Person: Director

- **1.1.a2 - Campus tours**

  Taking Community Members and donors on personalized tours of the campus has proven to be an engaging activity. Guests enjoy meeting faculty, staff, and students and seeing our beautiful campus on a very personal level. These tours often result in the experience being shared on social media and receiving invitations to speak out in the Community.

Start Date: 07/01/2018 **End Date:**   06/30/2023

Responsible Person: Director

- **1.1.a3 - Board engagement**

Each board member is expected to contribute their time, talent, and treasure toward the mission of the Foundation. Engaging board members with clear expectations, an orientation, and professional development opportunities is important to the success of the Foundation.

Start Date: 07/01/2018 **End Date:**   06/30/2023

Responsible Person: 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 dissimenate information on the Legacy Society to professional Estate Planners, Financial Advisors, CPA's, and Attorneys.

Start Date: 07/01/2018 **End Date:**   06/30/2023

Responsible Person: Director

- **1.2 - Objective - Re-connect with and engage alumni philanthropically**
  Priority Rank: 4
  Start Date: 07/01/2018 **End Date:**   06/30/2023
  Responsible Person: Director
  Strategic Direction: 9. Optimize Resources
  Impact Type: Site
  Institutional Learning Outcome: 4. Society and Culture
  Resource Requests:

  - **1.2.r1 - Develop Alumni Engagement Plan**
    Description

    We draw most of our students from our local communities, and the vast majority of our graduates stay in the community to live and work. Developing a plan to reconnect with and engage alumni philanthropically will help us sustain the ongoing support of the Foundation to the College and build an army of ambassadors in our community. The first step is to work with a professional consultant to develop an alumni engagement plan.

Rationale

Our alumni are willing to provide financial support to their alma mater -- we just need to do a better job of communicating to our alumni that support is needed and ultimately make the ask. Our four-year counter-parts are fully staffed and have the resources to develop alumni programs. We need to invest in alumni engagement efforts here to see the rewards of an engaged alumni community.

Resource Type: One-time

Expenditure Category: Consultants & Other Services (5113)

First Year Cost/Savings: $50,000.00/$0.00

Actions/Activities:

- **1.2.a1 - Develop Alumni Engagement Plan**

  We have indexed and cleaned our alumni datatbase. We are in process of merging these records into our donor datatbase. We need to work with a professional marketing consultant to develop an on-going and sustainable way to connect with and engage alumni.

  Start Date: 07/01/2018 **End Date:**   06/30/2023

  Responsible Person: Director

- **1.2.a2 - Collect Alumni success stories**

  We need to collect Alumni success stories as a way to engage successful alumni and share our stories in the community.

  Start Date: 07/01/2018 **End Date:**   06/30/2023

  Responsible Person: Director

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

  Priority Rank: 2

  Objectives:

  - **2.1 - Objective - Focus efforts on Community Relations and Resource Development**

    Priority Rank: 3

    Start Date: 07/01/2018 **End Date:**   06/30/2023

    Responsible Person: Director

    Strategic Direction: 4. Expand Access

Impact Type: District Wide

Institutional Learning Outcome: Not Applicable

Actions/Activities:

- **2.1.a1 - Manage scholarship process**

  We have implemented a new scholarship software and managed the entire scholarship process from our office. The number of scholarships and amount of scholarships has doubled in the past few years. There are grants to write, reports to submit, and donors to steward if we want to continue on this trejectory. Scholarships remain among the most important ways to help students overcome their financial barriers and celebrate achievements. At other community colleges, the selection of students and awards process is a function of student services. This model allows the Development office to concentrate on bringing in the money and stewarding the donors. We recommend the exploration of partnering with our Financial Aid office to oversee the awarding process.

  Start Date: 07/01/2018 **End Date:**   06/30/2023

  Responsible Person: Director

- **2.1.a2 - Manage iSEEK program**

  We have implemented and managed the iSEEK program from our office. The partnerships developed has been extremely successful and the student participation has varied between 30-90. This program has resulted in student success and great collaboration in our community and the ability for our students to afford to continue their education. Now that the program is established, we would like to explore having the management of the program and the identification and placement of students adopted as a function of student services. We would recommend the exploration of partnering with Career Services or the Work study program to oversee the iSEEK student employment program.

  Start Date: 07/01/2018 **End Date:**   06/30/2023

  Responsible Person: Director

- **2.2 - Objective - Develop employees professionally**

  Priority Rank: 2

  Start Date: 07/01/2018 **End Date:**   06/30/2023

  Responsible Person: Director

  Strategic Direction: 8. Support Employee Growth

  Impact Type: District Wide

Institutional Learning Outcome: 3. Interpersonal and Group Skills
Resource Requests:

- **2.2.r1 - Professional Development**
Description

  Council for Advancement and Support of Education - Conference for Community College Advancement

  Network of California Community College Foundations Conference

  Academy for Grassroots Organizations - Fundraising Academy

  These conferences and trainings provide the opportunity to network with colleagues and learn from their best practices while receiving high quality professional development.

  Rationale

  Good talented people naturally want to advance, and appreciate meaningful support in the process. Our talented staff would like to take advantage of professional development opportunities and attend trainings and conferences related to Resource Development and Community Relations. Specifically, the Director and staff should attend the CASE conference for Community College Advancement. The ongoing costs are worth the investment in your staff and the ability to attend conferences is really important.

  Resource Type: Ongoing
  Expenditure Category: Conference and Travel (5200)
  First Year Cost/Savings: $5,000.00/$0.00
  Second Year Cost/Savings: $5,000.00/$0.00
  Third Year Cost/Savings: $5,000.00/$0.00

- **2.3 - Objective - Manage donor information effectively**
Priority Rank: 5
Start Date: 07/01/2018 **End Date:**   06/30/2023
Responsible Person: Director
Strategic Direction: 9. Optimize Resources
Impact Type: Department
Institutional Learning Outcome: 5. Information Literacy

- **2.4 - Objective - Manage financial information effectively**

  Priority Rank: 6

  Start Date: 07/01/2018 **End Date:** 06/30/2023

  Responsible Person: Director

  Strategic Direction: 9. Optimize Resources

  Impact Type: Department

  Institutional Learning Outcome: 5. Information Literacy

  Actions/Activities:

  - **2.4.a1 - Proper fund management**

    As contributions increase the assets of the Foundation, honest and prudent management of the allocation of the assets is paramount. Board members are fiduciaries of the Foundation's assets. They are responsible to see that the funds received are allocated and dispersed for their intended purpose and that prudent investment practices are followed. This is to be achieved in several ways: 1) Annual budgeting; 2) Accounting; 3) Financial and investment portfolio reporting, and 4) Financial review and auditing. While a major portion of funds held by the Foundation are endowed or designated for specific purposes, prudent management of general (undesignated) funds is required to ensure expenditures on those items agreed to in priority.

    Start Date: 07/01/2018 **End Date:** 06/30/2023
    Responsible Person: Account Clerk/Administrative Secretary

11. Comments

This space is provided for participants and managers to make additional comments. Comments are not required.

There are no comments for this plan.

12. Supporting Documents

This question is for attaching supplemental materials. Supporting documents are not required.

- [TeamCrafton EE Giving Form 18-19.pdf](#)
- [PresentationCHC.pptx](#)
- [Student Emergency Fund.pdf](#)
- [Strategic Plan.pdf](#)
- [Foundation Scholarship Book 2018.pdf](#)
- [Gala Program 2018 15.pdf](#)