

INSTITUTIONAL PROGRAM REVIEW 2015 – 2016
Program Efficacy Phase: Administrative Services
DUE: March 30, 2016

Purpose of Institutional Program Review

Purpose of Program Review: Welcome to the Program Efficacy phase of the San Bernardino Valley College Program Review process. Program Review is a systematic process for evaluating programs and services annually. The major goal of the Program Review Committee is to evaluate the effectiveness of programs and to make informed decisions about budget and other campus priorities.

For regular programmatic assessment on campus, the Program Review Committee examines and evaluates the resource needs and effectiveness of all instructional and service areas. These review processes occur on one-, two-, and four-year cycles as determined by the District, College, and other regulatory agencies. Program review is conducted by authorization of the SBVC Academic Senate.

The purpose of Program Review is to:

- Provide a full examination of how effectively programs and services are meeting departmental, divisional, and institutional goals
- Aid in short-range planning and decision-making
- Improve performance, services, and programs
- Contribute to long-range planning
- Contribute information and recommendations to other college processes, as appropriate
- Serve as the campus' conduit for decision-making by forwarding information to appropriate committees

Our Program Review process includes an annual campus-wide needs assessment each fall and an in-depth efficacy review of each program on a four-year cycle. All programs are now required to update their Educational Master Plan (EMP) narrative each fall. In addition, CTE programs have a mid-cycle update (2 years after full efficacy) in order to comply with Title 5 regulations.

Two or three committee members will be meeting with you to carefully review and discuss your document. You will receive detailed feedback regarding the degree to which your program is perceived to meet institutional goals. The rubric that the team will use to evaluate your program is embedded in the form. As you are writing your program evaluation, feel free to contact the efficacy team assigned to review your document or your division representatives for feedback and input.

Draft forms should be written early so that your review team can work with you at the small-group workshops (March 4 and March 25, 2016). Final documents are due to the Committee co-chair(s) by **Wednesday, March 30** at midnight.

It is the writer's responsibility to be sure the Committee receives the forms on time.

The efficacy process now incorporates the EMP sheet, a curriculum report (if applicable), and SLO/SAO documentation. We have inserted the dialogue from the committee where your last efficacy document did not meet the rubric. SBVC's demographic data will be available on or before February 26. Below are additional links to data that may assist you in completing your document:

California Community College Chancellor's Office Datamart: <http://datamart.cccco.edu/>

SBVC Research, Planning & Institutional Effectiveness:
<http://www.valleycollege.edu/about-sbvc/offices/office-research-planning>

California Community Colleges Student Success Scorecard:
<http://scorecard.cccco.edu/scorecard.aspx>

Program Efficacy 2015– 2016

Complete this cover sheet as the first page of your report.

Program Being Evaluated

Development & Community Relations

Name of Division

President's Office

Name of Person Preparing this Report

Karen Childers

Extension

8987

Names of Department Members Consulted

Dr. Gloria Fisher

Name of Reviewers (names will be sent to you after the committee meets on February 19)

Christie Gabriel, Kay Weiss, Wallace Johnson
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Work Flow	Date Submitted
Initial meeting with department	3/21/16
Meeting with Program Review Team	3/25/16
Report submitted to Program Review co-chair(s) & Dean	by midnight on March 30, 2016

Staffing

List the number of full and part-time employees in your area.

Classification	Number Full-Time	Number Part-time, Contract	Number adjunct, short- term, hourly
Managers	1	0	0
Faculty	0	0	0
Classified Staff	1.2	0	2
Total	2.2	0	2

Office of Development and Community Relations - 2015-16

SBVC Employee Headcount	10-11	11-12	12-13	13-14	14-15
Adjunct Faculty	364	309	336	344	386
Tenured Faculty	154	151	148	146	147
Classified	219	219	218	199	193
Administrator	18	18	17	15	17
Total Employees	755	697	719	704	743

Student Headcount	10-11	11-12	12-13	13-14	14-15
Unduplicated Enrollment	19,169	16,593	15,441	16,080	17,044
Day Class Enrollment*	9,789	9,158	8,781	9,220	9,639
Evening Class Enrollment*	3,343	2,606	2,502	2,350	2,408

*Reporting period is fall term only of the academic year.

SBVC Foundation	10-11	11-12	12-13	13-14	14-15
# of Board members	28	27	27	27	27
# of Board members who are SBCCD employees	3	3	3	3	3
# of Board members from the community	25	24	24	24	24

Scholarships Awarded	10-11	11-12	12-13	13-14	14-15
Total Awarded	\$83K	\$104K	\$117K	\$162K	\$201K
Number of Scholarships*	115	117	127	126	120
Number of Awards*	253	270	233	230	379
Number of unduplicated students awarded	166	200	162	177	244
Avg \$ amount awarded	\$328	\$386	\$505	\$704	\$530

*"Scholarships" are defined as separate funds; for example, the Hunter Scholarship, the Villarreal Scholarship, the Schmidt Scholarship, etc.

**"Awards" are defined as amounts awarded to students from scholarships. For example, 6 awards from the Hunter Scholarship fund, 1 award from the Villarreal Scholarship, 2 awards from the Schmidt Scholarship, etc.

Description:

The SBVC Office of Development and Community Relations (DCR) is charged with developing and implementing strategies that promote long-term sustainable growth and deepen SBVC's relationships with existing and new donors. This College development function is supplemented by a close relationship with the SBVC Foundation.

The San Bernardino Valley College Foundation is a fundraising organization committed to the stewardship of assets and the development of relationships to advance the vision of San Bernardino Valley College. The San Bernardino Valley College Foundation's vision is to "sustain and promote the legacy of San Bernardino Valley College in our community."

Assessment:

The DCR is a College advancement office devoted to enhancing SBVC's position in the community as a local provider of quality post-secondary education. Included in the DCR's function is developing relationships and raising financial support. Gifts are applied to scholarships, improvement of facilities and instructional equipment, and supporting vocational and academic disciplines. Most gifts are processed through the SBVC Foundation because of its status as a charitable organization. As an independent, 501(c)(3) nonprofit organization, the SBVC Foundation acts as the fiduciary body for donated assets. Thus the standard college advancement functions addressed by the DCR are supplemented by the work of the SBVC Foundation.

Current DCR staffing includes a full-time Director, full-time Secretary II, and 0.2 FTE Account Clerk II. A Professional Expert Special Events Planner was added in January 2016, and a Professional Expert Writer/Photographer was added in February 2016.

DCR Goals:

1. 15% increase in available scholarships.
2. Scholarship checks distributed prior to fall 2016 registration deadlines.
3. Active alumni committee.
4. 10% increase in number of donors
5. 1 in-kind donation (art, equipment, etc.)

Challenges & Opportunities:

A new Director of Development and Community Relations started July 13, 2015 after the permanent Director of Resource Development left in July 2013. The Director position was filled temporarily with a consultant from October 2014 through May 2015. At the start of the 2015-16 academic year, there was no longevity within the Development and Community Relations Office, resulting in a lack of institutional knowledge. This represents both a challenge and an opportunity. Permanent staffing consists of 2.2 positions: a Director, Secretary II, and 0.2 FTE Account Clerk II. The Secretary II position was filled in February 2016. The new staff must become familiar with established appeals, donors, scholarships, events, etc. while simultaneously implementing additional effective fundraising strategies.

Action Plan:

The DCR action plan addresses four overarching goals: alumni relations, community outreach, fundraising, and Foundation Board development. To that end, DCR staff will work with the SBVC Foundation Board as follows:

- 200 in-person contacts by 6/30/16
- 100 follow-ups by 6/30/16
- Assist with planning of 90th anniversary celebration
- Create and share profiles of scholarship awardees
- Inform potential donors of giving options
- Work with businesspersons for potential Board membership

Part I: Questions Related to Strategic Initiative: Access

Use the demographic data provided to describe how well you are providing access to your program by answering the questions below.

Strategic Initiative	Institutional Expectations	
	Does Not Meet	Meets
Part I: Access		
Demographics	The program does not provide an appropriate analysis regarding identified differences in the program's population compared to that of the general population	The program provides an <u>analysis</u> of the demographic data and provides an interpretation in response to any identified variance. If warranted, discuss the plans or activities that are in place to recruit and retain underserved populations.
Pattern of Service	The program's pattern of service is not related to the needs of students.	The program provides <u>evidence</u> that the pattern of service or instruction meets student needs. If warranted, plans or activities are in place to meet a broader range of needs.

Table 1. DEMOGRAPHIC DATA

Student Demographics - Academic Years - 2012-13 to 2014-15		
Demographic Measure	Dev. & Community Relations	Campus-wide
Asian	4.9%	4.9%
African-American	13.4%	13.4%
Hispanic	61.8%	61.8%
Native American	0.3%	0.3%
Pacific Islander	0.4%	0.4%
White	15.4%	15.4%
Unknown	0.6%	0.6%
Female	55.1%	55.1%
Male	44.7%	44.7%
Disability	5.6%	5.6%
Age Min:	15	15
Age Max:	83	83
Age Mean:	27	27

Table 2. Demographics of Students Served by Foundation Scholarships

		Foundation Scholarships 2014-15 to 2015-16			
Demographic Measure	Campus-wide	2014-15 Applicants	2014-15 Awardees	2015-16 Applicants	Scholarship Criteria (n=26)*
Asian	4.9%	5.8%	4.5%	5.1%	2
African-American	13.4%	15.7%	16.2%	21.3%	5
Hispanic	61.8%	57.6%	58.3%	51.5%	8
Native American	0.3%	1.3%	1.2%	1.6%	1
Pacific Islander	0.4%	1.3%	1.8%	2.2%	1
White	15.4%	15.4%	15.0%	14.5%	0
Unknown	0.6%	2.9%	3.0%	3.8%	0
Female	55.1%	61.5%	57.5%	67.6%	2
Male	44.7%	38.5%	42.5%	32.4%	3
Disability	5.6%	18.6%	25.2%	20.5%	3
Age Min:	15	20	20	17	0
Age Max:	83	68	68	71	1
Age Mean:	27	32	33	31	0

*The majority of Foundation scholarships do not specify demographics in their award criteria. See page 6.

Provide an analysis of how internal demographic data compare to the campus population. Alternatively provide demographics relative to the program that are collected. If internal data is not collected, describe plans to implement collection of data.

DCR serves as a liaison between the campus and the community, and as such, direct student services do not comprise the majority of DCR work. The most direct result of DCR work on SBVC students is the awarding of Foundation scholarships. DCR's function in awarding scholarships is to work with donors to increase available scholarships and ensure that scholarships are awarded according to donor intent. The DCR Director chairs the Scholarship Selection Committee as a stewardship function.

Awarding of scholarships also involves student services work. The Financial Aid Office coordinates scholarship application workshops during the application period and coordinates all non-Foundation scholarships. The online SBVC Foundation Scholarship application is hosted on the Financial Aid website, which exposes students to scholarships as an important component of their total financial aid package. When selections for Foundation scholarships are made, the DCR maintains a list of awardees and communicates the award information to the Financial Aid Office for inclusion in the student's total financial aid award package. Thus DCR and Student Services work closely to coordinate efforts during the Foundation scholarship application and award period.

All SBVC students are eligible to apply for Foundation scholarships; in that sense, students served by the DCR match SBVC demographics (Table 1). Indeed, scholarship applications are promoted via direct email to all students, announcements on the SBVC and Foundation web pages, social media, and posters and flyers distributed widely on campus. Student Services programs such as EOPS, DSPS, Guardian Scholars, Valley-Bound Commitment Program, STAR, Puente, and others actively promote scholarships to their students, and as such, applicant data reflects higher rates of application from traditionally underserved populations (Table 2). Table 2 shows demographic data for students who applied for scholarships ("applicants"). Of those, the next column ("awardees") shows demographic data for students who were selected for scholarships. Awardee data from 2014-15 also shows higher numbers for traditionally underserved populations, with the exception of Hispanic students. As shown in Table 2, applicant and awardee data from 2014-15 show a lower percentage of Hispanic applicants

and awardees than the campus demographics, and applicant data from 2015-16 continue this downward trend for Hispanic students. The Financial Aid Office continues to offer scholarship application workshops to all students and additional presentations and workshops to programs serving Hispanic students, and the need will continue. The SBVC Latino Faculty and Staff Association has also offered to assist in increasing awareness and access for Hispanic students to apply for all scholarships, including those available through the SBVC Foundation.

Table 2 also shows a lower percentage of male applicants than the campus demographics. DCR has already established a relationship with the First Year Experience program and the BROTHERS mentoring program. The office will request targeted outreach to male students for the 2016-17 scholarship application period, to encourage male students to apply for scholarships in higher numbers.

Student Services provides scholarship workshops and coordinates scholarship essay help during the scholarship application period. DCR works with donors and chairs the Scholarship Committee as a stewardship function.

Outreach functions such as those described above were formerly handled by dedicated staff, as explained in the next section. As shown by the data in Table 2, some efficiency has been lost in addressing student needs through the scholarship application process due to the loss of staff exclusively charged with coordinating scholarships.

In 2015, 120 different scholarships were awarded to 244 students for a total of \$201,032 in scholarship funds distributed to students. Of the 120 scholarships, 26 include specific demographic requirements in their selection criteria. The distribution of selection criteria for these 26 scholarships is shown in Table 2.

Table 2 shows a higher percentage of scholarships awarded to students with a disability (18.6%, 25.2%, and 20.5%) than there are campus-wide (5.6%). This has to do with scholarship criteria. Three (3) Foundation scholarships are specifically for students with disabilities, and one of those scholarships gives multiple awards. The DSPS office is aware of these scholarships and encourages students to apply.

Pattern of Service

How does the pattern of service and/or instruction provided by your department serve the needs of the community? Include, as appropriate, hours of operation/pattern of scheduling, alternate delivery methods, weekend instruction/service.

Scholarships

Prior to 2013, a full time staff person in the DCR Office (formerly the Office of Resource Development) coordinated scholarship applications and awards. Gloria Ceballos performed this function for more than 20 years, replaced by Secretary II Mary Valdemar, who performed this function while Debby Gallagher took care of administrative support in the Office of Resource Development as Secretary II. Gloria and Mary publicized scholarship availability, created and distributed flyers and posters, coordinated and facilitated scholarship workshops and individual student assistance, visited classrooms, participated in the Scholarship Committee, tracked awards, and collected thank-you letters from students. They maintained scholarship records and statistics and completed reports.

For 2013-14 and 2014-15, professional expert Joseph Nguyen served as Scholarship Coordinator, arranging workshops for students and publicizing the availability of Foundation scholarships. Joseph reported to the Student Services Division.

Toward the end of the 2014-2015 academic year, scholarship work was formally divided between the DCR (for working with community members to fund current and new scholarships, as well as to ensure that scholarships are awarded according to donor specifications), and the Financial Aid Office (for student outreach, publicity, creation and delivery of scholarship application workshops, hosting of the scholarship application on the Financial Aid web page, classroom visits, and working with campus programs and clubs to encourage students to apply). In addition, the Financial Aid Office manages direct scholarships, i.e., those awarded directly to students without going through the Foundation. Financial Aid Coordinator Maria Trujillo added scholarship duties related to student services to her existing duties, and she has served in that capacity for the 2015-2016 academic year. The DCR produced flyers and posters for the 2015-2016 year as both offices are still trying to find the most effective way to coordinate their efforts. Maria's scholarship work during the 2015-2016 application period included outreach to student organizations and campus programs to deliver scholarship application workshops and encourage students to apply. In addition, a "last chance" workshop was hosted by Student Services on January 20, 2016, one day prior to the application deadline, to help students submit their applications. This workshop was publicized on the campus website and social media, emailed to all students at their SBVC and personal email addresses, and served students from 8:00 a.m. until 7:00 p.m.

DCR ensures that scholarships are awarded in accordance with donor specifications. DCR Director Karen Childers chairs the Scholarship Committee which consists of faculty, staff, and managers interested in assisting with selection of scholarship awardees. Yvonne Beebe replaced Shalita Tillman as co-chair of the committee in Fall 2015. For the 2014-2015 academic year, Interim DCR Director Kevin Dooley and CalWORKs Supervisor Shalita Tillman co-chaired the Scholarship Committee.

Development

The SBVC Office of Development and Community Relations is staffed by a full-time Secretary II who is available during regular business hours, Monday through Friday, 8:00-5:00, year round. A 0.2 FTE Account Clerk II is assigned to DCR, and that function has been filled by Girija Raghavan since 2009. In addition, DCR Director Childers attends an average of 2-3 community meetings or events per week. These meetings and events occur on and off campus, during regular business hours as well as evenings and weekends. Examples include San Bernardino Area Chamber of Commerce events, CSUSB 50th anniversary celebrations and the annual Pow Wow at CSUSB, meetings of area service clubs, the Inland Empire Planned Giving Round Table, and the San Manuel Forging Hope breakfast. Individual meetings include community members, potential donors, alumni, and Foundation Board Directors. There is also a concerted effort to bring community members to campus and attend on-campus activities where potential donors are likely to attend. Examples of such activities include tours of the Athletic Complex, an Estate Planning workshop in January 2016, hosted lunches in the Sunroom, attendance at the November 2015 Talent Show,

attendance at SBVC retiree luncheons, and attendance at the February 2016 Black History Month Breakfast.

The SBVC Foundation Board meets bimonthly on Wednesdays at 5:00 p.m. In addition, there are six active Foundation committees that hold meetings between full Board meetings. The DCR Director is an ex-officio member of the full Foundation Board and all committees and as such has frequent contact with Foundation Directors. The Foundation Board actively promotes San Bernardino Valley College as “a community treasure” (as described by one Board Director) and nurtures relationships with community members and donors. Foundation committee and Board work on the part of the DCR Office and Director keeps the Foundation Board engaged and excited about the College. Most Foundation meetings occur off campus and/or outside regular business hours. Minutes are required. For on-campus meetings outside regular business hours, student workers or the Special Events Planner attend and take minutes. For off-campus meetings, the Special Events Planner attends and takes minutes. More importantly, the Special Events Planner assists with events, as described below.

In September 2015, DCR Director Childers set a goal of having direct, in-person contact with 200 community members during the 2015-16 year, and following up with 100 of them. As of March 21, 2016 the goals had been surpassed, with 222 contacts and 124 follow-ups. These contacts include members of the community organizations listed above, as well as members of the campus community, District partners and vendors, alumni, CSUSB, UCR, and other SBVC stakeholders.

Events

In development work, events are commonly used to engage community members and provide an opportunity for donations (KnowHowNonprofit, 2015). Events can be effective if they are run well, but they involve a cost-benefit analysis. According to KnowHowNonprofit (2015), “Successful events depend on having the right skills and know-how as to what works, having the appropriate resources to plan and manage them, and marketing the event effectively to the target audience.” As shown in Table 3, SBVC development and community relations events have shown varied effectiveness. DCR defined its purposes for each event in 2015-16 and has achieved its goals thus far. The 2016-17 year is a unique opportunity to hold events in recognition and celebration of SBVC’s 90th year. Thus a full slate of 90th anniversary events will be finalized in summer 2016.

In January 2016, a professional expert Special Events Planner was brought on to coordinate events for the DCR. The Special Events Planner increases opportunities for acquiring educational and support services by managing events. The nature of her work often takes her off campus during regular business hours as well as evenings and weekends. Well-planned and well-run events increase community engagement and support.

Table 3. DCR Event Calendar

2014-15 Academic Year				
Date	Event	Purpose	Goal	Outcome
10/17/14	Auditorium Grand Reopening	Fundraising and Development	\$34,250 and 470 attendees; expenses of \$8,000	\$7,795 and 106 attendees; expenses of \$27,546
5/1/15	5 th Annual Golf Tournament	Fundraising	\$40,000	\$11,075 net proceeds

2015-16 Academic Year				
Date	Event	Purpose	Goal	Outcome
12/1/15	Give Big San Bernardino	Fundraising and Cultivation: new donor development	\$100 and 5 new contacts	\$111 and 6 new contacts
12/4/15	President's basket event (with the President's Office)	Fundraising and Development: Holiday celebration	At least 2 Foundation Directors in attendance	\$4,259 toward textbook scholarships; Beemer and Harrison in attendance
1/13/16	Estate Planning Workshop	Cultivation: Start relationships with potential Legacy Society givers	50 attendees	40 attendees
1/13/16	Fundraising Committee meeting	Fundraising: Plan golf tournament and 90 th anniversary	Golf \$50,000 90 th \$100,000	\$16,095 as of 3/26/16 \$4,000 as of 3/26/16
8/17/15 and 1/15/16	Parking Space drawing	Fundraising: Increase funds to General Textbook scholarships	8/17/15: no goal set 1/15/16: \$560	8/17/15: \$560 1/15/16: \$510
1/29/16	Valley-Bound / San Manuel Luncheon	Stewardship: Recognize and thank SMBMI, satisfy grant requirement	Attendees to include 15 VBC students and at least 1 San Manuel representative	26 student attendees, 7 VBC faculty / management attendees, 2 Foundation Directors, 1 San Manuel representative. SBVC Foundation is eligible to apply for 2016-17 VBC grant of \$300K
2/26/16	President's Circle Luncheon	Cultivation: Strengthen relationships with major donors	10 President's Circle members in attendance	13 donors in attendance who have given or pledged \$1,000 or more for 2015-16
4/15/16	6 th Annual Golf Tournament	Fundraising for Athletics and Scholarships	\$50,000	\$16,095 as of 3/26/16
5/4/16	Donor Reception followed by Scholarship Awards Ceremony	Stewardship: Recognize and thank scholarship donors	50% of student awardees attend, 15 scholarship donors	TBD
5/27/16	Regalia Reception followed by Commencement	Cultivation: Strengthen relationships with VIPs	15 attendees including SBCCD Trustees, Chancellor, SBVC President, and at least 1 Foundation Board Director	TBD

2016-17 Academic Year				
Date	Event	Purpose	Goal	Outcome
8/10/16	Athletic Complex Tour	Development: Bring alumni and other potential donors to campus; encourage attendance at Gala	25 attendees	TBD
10/14/16	90 th Anniversary Gala	Fundraising	\$100,000 and 500 attendees	\$4,000 as of 3/26/16
1/11/17	Athletics Complex Grand Opening	Development: Bring alumni and other potential donors to campus	100 attendees	TBD
Ongoing Annual Events				
<ul style="list-style-type: none"> • Campus Tours • Parking Space Drawing • Holiday Basket Drawing • San Manuel / Valley-Bound Scholars Recognition Event • Estate Planning Workshops • Give Big San Bernardino / Giving Tuesday • Board and Committee meetings 		<ul style="list-style-type: none"> • Fall Gala • Spring Golf Tournament • President's Circle Luncheon • Alumni Gatherings • Donor Reception and Scholarship Awards Ceremony • Regalia Reception • Campus Visits 		

Part II: Questions Related to Strategic Initiative: Student Success

Strategic Initiative	Institutional Expectations	
	Does Not Meet	Meets
Part II: Student Success – Rubric		
Data/analysis demonstrating achievement of instructional or service success	Program does not provide an adequate <u>analysis</u> of the data provided with respect to relevant program data.	Program provides an <u>analysis</u> of the data which indicates progress on departmental goals. If applicable, supplemental data is analyzed.
Service Area Outcomes (SAOs)	Program has not demonstrated that they are continuously assessing Service Area Outcomes (SAOs) based on the plans of the program since their last program efficacy. Evidence of data collection, evaluation, and reflection/feedback, and/or connection to area services is missing or incomplete.	Program has demonstrated that they are continuously assessing Service Area Outcomes (SAOs) based on the plans of the program since their last program efficacy. Evidence of data collection, evaluation, and reflection/feedback, and connection to area services is complete.

Explain how the services in the program support student success.

The most direct measures of student success on the part of the DCR are found under the office goal of Student Support. The goal is aligned with Benchmarks 2.9.3 and 2.13 of the Student Success Strategic Initiative:
2.9.3: Educate the whole person – as measured by the core competencies (academic, social, ethical).
2.13: Empower students.

Activities under the Student Support goal include increasing the number of available scholarships, distributing scholarship checks in a timely manner, creating and sharing profiles of scholarship awardees, and giving student workers a meaningful introduction to development / nonprofit work. These activities are assessed by tracking the number of scholarships awarded each year, tracking the date of scholarship issuance, tracking the number of student profiles created and shared each year, and tracking the number of student workers in the office and the nature of their assignments. Objectives are set annually in cooperation with the SBVC Foundation Board. For 2015-16, annual objectives were as follows:

1. Achieve a 15% increase in available scholarships over the 2014-15 baseline of 120 scholarships.
2. Distribute fall 2016 scholarships in June 2016, prior to the fall 2016 registration deadlines.
3. Create 3 new profiles of scholarship awardees and share them on the SBVC website or in printed materials.
4. Train 4-6 student workers on development / nonprofit work. Include the importance of donor confidentiality, professional customer service, effective donor stewardship, and marketing.

A total of 8 student workers were hired into the DCR in September 2015 and January 2016. The DCR Director provided an orientation including an overview of development work, the function of the nonprofit Foundation, marketing, confidentiality, and professional customer service. Social and ethical core competencies were addressed at the orientation and continue to be addressed; specifically, students understand donor confidentiality and are educated on appropriate customer service with multi-ethnic and multi-generational community members. Forty percent (40%) of SBVC Foundation scholarships are the result of a bequest or memorial fund, and students are exposed to ongoing relationships with surviving family members and friends. The orientation was followed by biweekly staff meetings and individual meetings with each student worker to review assignments and further assist students in expanding their knowledge. Students receive task lists and practice their new knowledge of advancement work. Tasks include greeting the public, answering the phone, developing new marketing materials for the office, creating social media posts for DCR fundraisers, taking inventory of Foundation scholarships, maintaining records, attending and taking minutes at SBVC Foundation Board meetings, and working with the Foundation Alumni Committee. Student workers use Microsoft Office applications and are provided with online tutorials in Word and Excel, as well as one-on-one assistance with the applications by the DCR Secretary II.

Three profiles of scholarship awardees were created in Fall 2015 and posted to the Valley-Bound web page at http://www.valleycollege.edu/student-services/specialized-counseling-services/valley-bound-commitment/Student_Spotlight. Photos and a brief bio were included. Additional profiles will be created after 2016-17 scholarship awards are announced.

In 2014-15, scholarship awardees were selected and notified on time, but checks were delayed until August 2015. Unfortunately this caused difficulties for students who intended to use scholarship funds to pay their registration fees and purchase books, as well as frustration because students were told they would get their scholarship checks in June 2015. In February and March 2016, the DCR Director and Account Clerk II finalized a timeline for issuing scholarship checks in June 2016, and the office is on track to meet that objective.

The scholarship inventory produced by DCR student workers revealed 14 scholarships that were available but not awarded in the previous year. In addition, 4 new scholarships were created in 2015-16, resulting in a 15% increase

in available scholarships. At this writing, there are 409 awardees, an increase of 8% over the previous year. Many scholarships have more than one awardee, so the 2015-16 results (once finalized in April 2016) will likely result in an increase in the number of students awarded scholarships.

Demonstrate that your program is continuously assessing Service Area Outcomes (SAOs) based on the plans of the program since the program's last efficacy report. Include evidence of data collection, evaluation, and reflection/feedback, and describe how the SAOs are being used to maintain and improve area services (e.g., discussions, revisions, assessments, etc.). Refer to EMP.

INSERT SAO SUMMARY REPORTS

See [Strategic Goal 2.11](#)

The DCR has established this SAO as part of this Program Efficacy process.

SAO: To steward assets and develop relationships to advance the vision of San Bernardino Valley College.

The SAO is aligned with the SBVC Foundation's mission statement: "The San Bernardino Valley College Foundation is a fundraising organization committed to the stewardship of assets and the development of relationships to advance the vision of San Bernardino Valley College." Aligning the SAO in this way leverages the development and community relations responsibilities of the College with the support available by the Foundation as an independent, nonprofit organization. The DCR plan described in the Productivity section of this Program Efficacy report (p. 15) gives additional detail about benchmarks, outputs and outcomes, and alignment with the SBVC Master Plan. Stewardship of assets and development of relationships is measured in relation to six broad goals: Strategic Planning, Student Support, Alumni, Community Outreach, Fundraising, and Board Development. Benchmarks have been set in each goal area and are tracked by the DCR.

Assessment of the SAO is achieved through measuring progress against the DCR office goals, which are included (along with Benchmarks for each) on pages 17-18. The DCR Director meets regularly with the College President and reviews progress against each of these benchmarks. From July 2015 to March 2016, progress toward the benchmarks has been achieved as described on pages 17-18.

Assessment of the SAO is most clearly linked to the DCR goals of Community Outreach, Fundraising, and Student Support. Community Outreach is measured in terms of the number of unique, in-person contacts, the number of follow-ups, campus visits, and donations. These benchmarks are based on development research which supports the idea that donations follow engagement (CASE, 2015). In-person engagement is most effective (Chronicle of Philanthropy, 2015), and the single most powerful means of engaging donors in educational causes is to bring them to campus (Chronicle of Philanthropy, 2015). The DCR Director keeps an Excel sheet which tracks personal contacts, follow-ups, the outcome of each contact, and additional notes to help nurture the relationship. The 222 contacts made from July 2015 to March 2016 have resulted in 124 follow-ups, 35 campus visits, and 31 new or increased donations. The Foundation Board is more involved and cohesive as a result of personal contact with the DCR Director, as evidenced by a quorum being achieved at every meeting in 2015-16 after struggling for two years to achieve a quorum consistently. Five new Foundation Board members are expected to be approved at the May 2016 Foundation Board meeting, and these are included among the 222 contacts and 124 follow-ups.

Fundraising is assessed by tracking donations in QuickBooks and DonorPerfect. Both the number and type of asset is tracked. For example, one objective for 2015-16 was to secure a donation of art or equipment. The DCR Director called art appraisers and was introduced to a collector who donated 10 Salvador Dali prints valued at \$5,000 each, for a total new asset of \$50,000. DonorPerfect is showing 71 new donors for 2015-16. The 90th anniversary celebration is planned for October 14, 2016 and has thus far brought in \$4,000 in donations toward a goal of \$100,000. The DCR Secretary II and Director use DonorPerfect, and the Account Clerk II is the primary user of QuickBooks, with view-only access planned for the DCR Director and Secretary II. SBVC Foundation books undergo an independent audit each year in accordance with nonprofit law and best practices. Separation of banking activity (e.g., making deposits, writing checks, reconciling bank statements to QuickBooks records) from receipt and tracking of donations (e.g., picking up the mail, recording donations in DonorPerfect) is an internal control recommended by SBVC Foundation Treasurer Jose Torres, past SBCCD Auditor Tanya Rogers, and by the independent auditor.

Part III: Questions Related to Strategic Initiative: Institutional Effectiveness

Strategic Initiative	Institutional Expectations	
	Does Not Meet	Meets
Part III: Institutional Effectiveness – Rubric		
Mission and Purpose	The program does not have a mission, or it does not clearly link with the institutional mission.	The program has a mission, and it links clearly with the institutional mission.
Productivity	The data does not show an acceptable level of productivity for the program, or the issue of productivity is not adequately addressed.	The data shows the program is productive at an acceptable level.
Relevance, Currency, Articulation	<p>The program does not provide evidence that it is relevant, current, and that courses articulate with CSU/UC, if appropriate.</p> <p>Out of date course(s) that are not launched into CurricUNET by Oct. 1 may result in an overall recommendation no higher than Conditional.</p>	<p>The program provides evidence that the curriculum review process is up to date. Courses are relevant and current to the mission of the program.</p> <p>Appropriate courses have been articulated or transfer with UC/CSU, or plans are in place to articulate appropriate courses.</p>

Mission and Purpose

SBVC Mission: San Bernardino Valley College maintains a culture of continuous improvement and a commitment to provide high-quality education, innovative instruction, and services to a diverse community of learners. Its mission is to prepare students for transfer to four-year universities, to enter the workforce by earning applied degrees and certificates, to foster economic growth and global competitiveness through workforce development, and to improve quality of life in the Inland Empire and beyond.

What is the mission statement or purpose of the program?

The mission of the Office of Development and Community Relations is to advance the mission of San Bernardino Valley College in the community we serve. The Office of Development and Community Relations works with the SBVC Foundation and engages the community to develop support of SBVC students and programs.

The Office of Development and Community Relations acts as a liaison between SBVC and the SBVC Foundation.

The mission and vision of the SBVC Foundation are as follows:

Mission: The San Bernardino Valley College Foundation is a fundraising organization committed to the stewardship of assets and the development of relationships to advance the vision of San Bernardino Valley College.

Vision: The San Bernardino Valley College Foundation sustains and promotes the legacy of San Bernardino Valley College in our community.

How does this purpose relate to the college mission?

The Office of Development and Community Relations (DCR) performs advancement functions on behalf of the College. According to the Council for Advancement and Support of Education (CASE), "the term advancement is often used when talking about fundraising in an educational context.... The term encompasses alumni relations, communications, fundraising, marketing and allied areas" (CASE, 2016).

As defined by CASE, advancement is related to the college mission because it represents a long-term strategy for continuing the quality work of SBVC that fosters economic growth in the Inland Empire and beyond. With state funding constantly fluctuating, SBVC needs alternative funding strategies. The SBVC Foundation has traditionally focused on scholarships, with some activity in program support. Foundation support can be expanded by developing a larger endowment that includes funds designated for both scholarships and program support. The larger the endowment, the more the fund generates in spendable interest and earnings. Indeed, in one study, the President of a very large community college (defined as having an endowment of \$10 million or more) "indicated that fundraising was the primary source of alternative revenue for [his college]" (Miller, 2013, p. 76). Another article encourages community colleges to imitate elite private colleges: "Investments from community colleges' endowments, combined, earn \$27.6 million a year, according to the American Association of Community Colleges. That's how much Harvard alone makes from its \$32.7 billion endowment about every two and a half days" (Marcus, 2013). Grants can be a significant source of alternative revenue as well and are often included in advancement, but most grants require the grantee to use all grant funds within the grant period. In contrast, effective partnership with the Foundation yields a permanent endowment that provides ongoing, permanent income in the form of interest and earnings. Larger advancement offices see their endowments grow exponentially by using part of the interest and earnings and reinvesting the rest. Large, sophisticated advancement offices also tend to attract more donors with the capacity to give larger gifts. Small advancement offices like the DCR become large, or mature, by growing in skill and scope and cultivating staff who specialize in the various advancement functions. Currently, the DCR staff is able to achieve minimal specialization through professional experts.

The DCR Director and staff develop relationships with alumni, retirees, local businesses, and other community members with the goal of increasing support of SBVC students and programs. The DCR stewards these relationships, making community presentations and encouraging potential donors to become more familiar with SBVC's success through campus visits and in-person meetings. The DCR also increases community awareness of SBVC, developing new relationships through participation in community groups and development of giving opportunities. DCR works closely with SBVC Marketing and also develops marketing products specifically related to development.

The DCR works with the SBVC Foundation, an independent, nonprofit, 501(c)(3) organization whose purpose is to support SBVC. The DCR coordinates events and fundraisers to increase awareness of and bring donations to the SBVC Foundation, which in turn are used to support SBVC through student scholarships and program support. Examples of activities include an alumni association, annual appeals, an annual golf tournament, the Legacy

Society (planned giving), naming opportunities, Foundation grants, employee giving, and celebratory events such as the 90th anniversary gala planned for October 14, 2016. Examples of support include student scholarships, the Valley-Bound Commitment Program, and fiscal management of the Pepsi fund. Funds for programs are less common than scholarships, and this is seen as an area of growth for the DCR. Examples of current program support funds include Theatre, Athletics, Inland Empire Media Academy, Everett-Hunter Nursing, and Psych Tech.

Productivity

Explain how your program defines and measures satisfaction and productivity. What do these measures reveal about your program over a three year period?

Include data that is relevant to your program. Examples of data may include:

- Relative status of the department at SBVC in comparison to the same department at other multi-campus districts in terms of
 - i. staffing levels
 - ii. compliance with state, local, and federal regulations
- Average time to respond to requests for service
- Average time to respond to complaints
- Results of user satisfaction surveys
- Results of employee satisfaction/staff morale surveys
- Additional identified benchmarks of excellence for the department, and department standing relative to these benchmarks of excellence

Satisfaction and productivity are measured in terms of engaged campus and community members and efficient management of Foundation funds.

The DCR has fewer regular staff persons than comparable offices at other multi-campus districts. RCCD has four full-time staff: Director, Assistant Director, and two Administrative Technicians. Victor Valley College has seven full-time staff: Director, Assistant Director, Executive Assistant, Special Events & Volunteer Coordinator, and Scholarship Assistant, and two Community Education Managers. Chaffey College has four: Executive Director, Director of Alumni Relations, Foundation Coordinator, and Administrative Assistant. Citrus College has four: Executive Director, Director, Administrative Assistant, and Accounting Assistant.

Lack of a permanent Director from 2013 to 2015 affected the office's ability to complete work in a timely manner, and understaffing still leads to issues with completion. For example, there was no annual report for 2014-15 because no one was available to collect photos and articles and organize the report. The 2014-15 audit was also delayed; the final report for the period ending June 30, 2015 was not received until March 2016. The Foundation is required to file an IRS 990 form each year to comply with federal nonprofit regulations, and the IRS 990 for 2013-14 was submitted in May 2015. The IRS 990 for 2014-15 has yet to be submitted; extension forms have been filed with the IRS.

The SBVC Office of Development and Community Relations sends survey cards to scholarship donors. This was done in 2011-12 and renewed in 2015-16. A letter was sent to each scholarship donor to give them the balance of their scholarship and the current award criteria. Donors were asked to confirm the criteria or send it back with their changes. Approximately 20% of donors responded by returning the card or contacting the DCR Office.

In March 2015, the SBVC Foundation Board reviewed a draft strategic plan written by Kevin Dooley, CCS consultant and Interim Director of Development. In August 2015, the new DCR Director Childers moderated a retreat with the SBVC Foundation Board where the draft plan was discussed further. The group decided to use the 2015-16 academic year to examine the plan more in depth and make changes. The new DCR Director was charged with coordinating the project.

In September 2015, the SBVC Foundation held its first regular meeting of the 2015-16 academic year and was presented with the DCR plan, which included a goal to present the draft of a new strategic plan to the Foundation Board by September 2016. In addition to this strategic planning goal, the DCR plan for 2015-16 included goals for student support, alumni, community outreach, fundraising, and Foundation Board development. The 2015-16 DCR plan and its outcomes to date are summarized below.

These benchmarks were set for only one year and will be reviewed prior to the August 2016 Foundation Board retreat. However, over a three-year period, these benchmarks and their future revisions will continue to relate directly to SBVC strategic initiatives while expanding advancement efforts.

Goal	Benchmarks	Outputs / Outcomes to Date	Alignment with SBVC Master Plan
SBVC Foundation 3-Year Strategic Plan	<ul style="list-style-type: none"> Foundation Board Directors review 3-yr plan and provide input Submit new 3-yr plan to the Foundation Board by September 2016 	<ul style="list-style-type: none"> Board Directors have reviewed the Strategic Plan and provided input Report to the Board planned for 6/15/16 Draft 3-yr plan planned for Sept. 2016 Fdn Board meeting 	<p>Strategic Initiative III: Communication, Culture & Climate.</p> <ul style="list-style-type: none"> Benchmark 3.8: Build stronger relationship with the SBVC Foundation.
Student Support	<ul style="list-style-type: none"> 15% increase in available scholarships Timely distribution of scholarships Create and share profiles of scholarship awardees 4-6 students will better understand nonprofit / Foundation work 	<ul style="list-style-type: none"> 18 new or reactivated scholarships are available to approx. 409 students, an increase of 8% over 2014-15 Timeline in place for June 2016 scholarship disbursement 3 profiles posted on VBC web page; additional profiles planned Total of 8 student workers for Fall and Spring semesters; Student workers are learning nonprofit / Foundation work 	<p>Strategic Initiative II: Student Success.</p> <ul style="list-style-type: none"> Benchmark 2.9.3: Educate the whole person – as measured by the core competencies (academic, social, ethical). Benchmark 2.13: Empower students.
Alumni	<ul style="list-style-type: none"> Increased alumni outreach SBVC students are familiar with alumni work 	<ul style="list-style-type: none"> Active alumni committee headed by Foundation Board Director Ed Szumski New alumni website Committee reports starting 9/16/15 2 student workers have been assigned to alumni work 	<p>Strategic Initiative III: Communication, Culture & Climate.</p> <ul style="list-style-type: none"> Benchmark 3.1.1: Sponsor regular alumni events.
Community Outreach	<ul style="list-style-type: none"> 200 in-person contacts by 6/30/16 100 follow-ups by 6/30/16 	<ul style="list-style-type: none"> 222 in-person contacts 124 follow-ups 35 of the 124 have visited campus 31 of the 124 have pledged or completed a new or increased donation amount 	<p>Strategic Initiative III: Communication, Culture & Climate.</p> <ul style="list-style-type: none"> Benchmark 3.4: Encourage all members of the campus community to participate in local community organizations.
Fundraising	<ul style="list-style-type: none"> 90th anniversary celebration 10% increase in number of donors 1 in-kind donation (art, equipment) 10 new or revived scholarships / funds 	<ul style="list-style-type: none"> 90th anniversary celebration planned for October 14, 2016 Bricks, appeals, events are bringing in donors 1 art donation (Dali prints) with appraised value or \$50,000 2 revived funds (Hunter, Psych Tech) 1 new fund (Students of the Arts) 4 new scholarships (Bojorquez, Valley Star HS, Bogatin, Cap & Gown) 14 revived scholarships (Robbins, Children's Fund, Atkins, Negrete McLeod, Huntoon-Ferre, Hawley-Percy, 	<p>Strategic Initiative III: Communication, Culture & Climate.</p> <ul style="list-style-type: none"> Benchmark 3.4: Build community recognition and networks by capitalizing on the deep roots and history of the campus.

		Shook, Obershaw, Restaurant Prof, City of SB, Ehrlich, Textbook, Griffin McNeily, Carl)	
Board Development	<ul style="list-style-type: none"> • 5 new Board Directors by 7/1/16 • Add at least 1 more businessperson to Foundation Board • Add 3 Cs to Board matrix 	<ul style="list-style-type: none"> • 5 new Board Directors nominated 3/16/16 • 2 businesspersons nominated • 3 Cs score (Capacity, Commitment, Connection) added to Board Development matrix 11/18/15 	<p>Strategic Initiative I: Access.</p> <ul style="list-style-type: none"> • Benchmark 1.6: Establish and maintain partnerships with community organizations, K-12 systems, and adult schools. <p>Strategic Initiative II: Student Success.</p> <ul style="list-style-type: none"> • Benchmark 2.8.6: Increase partnerships with businesses.

Relevance and Currency, Articulation of Curriculum

If applicable to your area, describe your curriculum (e.g., seminars, workshops, presentations, classes, etc. for Administrative Services).

The Office of Development and Community Relations makes regular presentations to current and potential supporters. DCR Director Childers has presented to the San Bernardino Area Chamber of Commerce, Classified and Academic Senates, the SBVC Management team, and attendees at the November 20, 2015 Spotighting Our Success dinner. The SBVC Foundation sponsored an Estate Planning seminar on flex day, January 13, 2016 that was attended by approximately 40 people. The Estate Planning seminar was promoted through SBVC Professional Development and included SBVC faculty, staff, and retirees.

DCR Director Childers and Marketing Director Paul Bratulin are planning a joint presentation on effective social media strategies at the annual CRD national conference in Washington, DC in October 2016. Both DCR and Marketing have experienced extraordinary results with Facebook ads.

The DCR holds individual or institutional memberships in the following professional organizations:

- CASE – the Council for Advancement in Secondary Education
- CRD – the Council for Resource Development
- AFP – Association of Fundraising Professionals
- SBACC – San Bernardino Area Chamber of Commerce

If applicable, describe your formal curriculum by answering the questions that appear after the Content Review Summary from Curricunet.

The Content Review Summary from Curricunet indicates the program’s current curriculum status. If curriculum is out of date, explain the circumstances and plans to remedy the discrepancy.

N/A

Articulation and Transfer

List Courses above 100 where articulation or transfer is not occurring	With CSU	With UC
N/A		

Describe your plans to make these course(s) qualify for articulation or transfer. Describe any exceptions to courses above 100.

N/A

Currency

Follow the link below and review the last college catalog data.

<http://www.valleycollege.edu/academic-career-programs/college-catalog.aspx>

Is the information given accurate? Which courses are no longer being offered? (Include Course # and Title of the Course). If the information is inaccurate and/or there are listed courses not offered, how does the program plan to remedy the discrepancy?

N/A

Part IV: Planning

Strategic Initiative	Institutional Expectations	
	Does Not Meet	Meets
Part IV: Planning - Rubric		
Trends	The program does not identify major trends, or the plans are not supported by the data and information provided.	The program <u>identifies and describes</u> major trends in the field. Program addresses how trends will affect enrollment and planning. Provide data or research from the field for support.
Accomplishments	The program does not incorporate accomplishments and strengths into planning.	The program incorporates substantial accomplishments and strengths into planning.
Challenges	The program does not incorporate weaknesses and challenges into planning.	The program incorporates weaknesses and challenges into planning.

What are the trends, in the field or discipline, impacting your student enrollment/service utilization? How will these trends impact program planning?

Philanthropic giving in the U.S. ebbs and flows with the economy. It has increased steadily in the past three years, and education is a popular cause for donors. According to the 2015 Philanthropic Landscape report from Community Counselling Service Co., LLP (CCS), education received the second highest percentage of U.S. charitable dollars in 2014 at 16%. Total donations to education in 2014 were \$54.6 billion, trailing only religious causes at \$114.9 billion. 72% of charitable gifts came from individuals, followed by foundations (15%), bequests (8%), and corporate giving (5%). SBVC is in a good position to appeal to individuals because of a large number of untapped alumni and retirees, as well as an opportunity to engage these individuals with the upcoming 90th anniversary year. Employee giving is also relatively untapped at SBVC, and five (5) employees started or increased their payroll deduction donation in 2015-16. During the 2015-16 year, the DCR has had good results with stewardship, i.e., following up with donors and ensuring that they feel appreciated and that their donation is used according to their wishes. While no group or individual is likely to give \$54.6 billion to SBVC in the foreseeable future, the DCR is working to increase awareness of the College, its programs, and its students, as well as emphasize that every gift matters. Program planning for 2015-16 has addressed gaps in service due to understaffing and lack of direction. Stewardship will continue to be a focus of planning as it encompasses all activities designed to nurture relationships. With the upcoming 90th year, events are planned to engage alumni, retirees, major donors, and new donors. The DCR's plan is to use the momentum from the 90th year to continue to build SBVC's donor and partner base in future years. A Professional Expert Special Events Planner was added in January 2016 and has helped increase participation and donations for the 2016 Golf Tournament from 95 and \$11,075 in 2015 to 110 and \$30,000 projected for April 2016. The 2016 Golf Tournament is scheduled for April 15, 2016. CASE (2012) reports that the average return on investment for each development team member is 300%. For 2015-16 the Professional Expert Special Events Planner was funded from general fund. Funding for 2016-17 and future years has not been identified and is a need within the Office if DCR is to maximize the opportunity of the 90th anniversary and continue to build SBVC's partner and donor base in succeeding years.

Many reports, including the CCS report, cite the importance of the relationship in charitable giving. People give to organizations with which they feel a pleasant sense of affiliation, and the people involved in development work must care about the donors. Donors respond to Development offices that are adequately staffed and able to give them the attention they expect. Development team members must be friendly, knowledgeable, trustworthy, able to respond promptly, and personally invested in the organization. Donors want to know that they are working with people who believe in SBVC and its students and can give them the attention they feel they deserve. The perception of the College as a whole must also be donor-friendly (Chronicle of Philanthropy, 2015). Subject matter

experts and senior administrators who are perceived as knowledgeable, dedicated to student success, and appreciative of the donor inspire support. In that sense, development efforts are a campus-wide responsibility facilitated by the DCR.

Accomplishments and Strengths

Referencing the narratives in the EMP Summary, provide any additional data or new information regarding the accomplishments of the program, if applicable. In what way does your planning address accomplishments and strengths in the program?

The DCR is on track to reach its goals for the 2015-16 year. The DCR plan will be presented again to the SBVC Foundation at the next Board retreat in August 2016, and accomplishment of the first year's goals will help to build confidence on the part of Foundation Directors. The Foundation Board is composed of community leaders who have clout in the local area, so their belief in the DCR will help as they talk about SBVC in the community. The DCR Director continues to build relationships, and Foundation Directors are also vital to carrying the message; rather than one person trying to reach everyone, Foundation Directors expand SBVC development work exponentially. Similarly, DCR staff, student workers and professional experts are trained on professional customer service, telephone etiquette, confidentiality, and appropriate office dress code. They work in teams to check each other's work and build relationships within the office. They rotate assignments to encourage relationship-building with different colleagues. In this way, the DCR becomes a model of what advancement looks like in the larger community.

The energy within the DCR Office is also a strength. Growth of development efforts is exciting and rewarding, as shown by anecdotal evidence from the SBVC Scholarship Committee, which was able to award 15% more scholarships than last year. That kind of advancement impact is a boon to employee enthusiasm and morale, and it directly affects success. The Financial Aid Office reports that 99% of SBVC students have financial need, and in their essays, many scholarship applicants cite money as their primary barrier to completing their studies. Scholarships directly help students to pay for books, school supplies, fees, parking, transportation, housing, child care and other expenses that affect their ability to succeed in their educational goals.

The longevity of the 0.2 FTE Account Clerk II is also a strength. Girija's familiarity with the annual audit and proficiency with QuickBooks and Foundation accounting has helped the DCR to pass the annual audit with no findings, comply with IRS regulations, and report accurate data.

Challenges

Referencing the narratives in the EMP Summary, provide any additional data or new information regarding planning for the program. In what way does your planning address trends and weaknesses in the program?

Staffing has represented the largest challenge during the 2015-16 year. The office is filled with new staff, from the DCR Director to the Secretary II to the professional experts and student workers. The office is also continuing to juggle scholarship work that was previously managed by full-time staff. It took 7 months to hire the Secretary II, during which time the Director assumed many clerical duties that took time from work in the community. Since February 2016 the Secretary II has been learning her job duties and freeing up the Director to spend more time with potential and actual donors.

A staff of two persons is inadequate to address the varied needs of the office, and the solution for the 2015-16 year has been to hire FWS students and professional experts. In particular, two professional experts have proven invaluable: the Special Events Planner, and the Staff Writer/Photographer. The Special Events Planner is arranging details for the 12 events scheduled for Spring 2016 and a full slate of events planned

for 2016-17 and ongoing. The Special Events Planner works on and off campus to secure the venue, collect small in-kind donations, and take care of details to maximize the success of the event. Event planning is as time-consuming as it is important. Relationships with potential donors can be destroyed if a detail is left out of an event, such as misspelling a name or forgetting a thank-you note. Larger details such as failing to accurately record a donation in DonorPerfect or having a cart available to transport donors from a parking lot (especially elderly donors or those with mobility issues) are important as well.

The professional expert Writer/Photographer was brought on in February 2016 and has remedied the problem of failing to do press releases, photos, and social media posts, something that is required as part of grant applications. The Writer/Photographer is also writing content and taking photos for the annual report, which was not produced for 2014-15 and will be revived for 2015-16. The failure to produce an annual report for 2014-15 was due to lack of staff available to write the articles and take the photos and lateness of the 2014-15 audit report, which was received in March 2016.

A current area of weakness for the DCR is planned giving. Although the DCR coordinated an Estate Planning seminar in January 2016 and received a large planned gift this year, the area is considered a weakness because no one has come forward with a new planned gift. Attention to this area would result in better awareness in the community, encouraging donors to inform the SBVC Foundation when they have included us in their estate plan. It is very helpful to be aware of the planned gift so that stewardship can begin. Unless we get to know donors better and become more proficient in this delicate area, donors will not tell us about their estate plans and may even change them if they feel disengaged from the College. The proposed solution is professional development and possible contracting of a planned giving expert. As shown in the 2015 report from CCS, bequests (planned giving) accounted for 8% of charitable giving in 2014. In fact, 7.9% of SBVC Foundation scholarships were established as the result of a bequest, and planned giving is responsible for 55% of the Foundation's current assets.

By their nature, planned gifts generally take years to realize, and they tend to be large gifts. In fact, CASE (2011) reports that for middle-income earners, a planned gift is usually the major gift. SBVC alumni include members of the Greatest Generation and Baby Boomers who are now considering their estate plans. With the College turning 90, timing is good for strengthening this area.

Resources needed:

- Special Events Planner
- Writer/Photographer
- Cart for campus tours and visits, especially for elderly donors and those with mobility issues
- Scholarship software
- Estate Planning training and/or consultant
- Support of students during the scholarship application process
- Continued accounting efficiency and accuracy

V: Questions Related to Strategic Initiative: Technology, Campus Climate and Partnerships

Strategic Initiative	Institutional Expectations	
	Does Not Meet	Meets
Part V: Technology, Partnerships & Campus Climate		
	<p>Program does not demonstrate that it incorporates the strategic initiatives of Technology, Partnerships, or Campus Climate.</p> <p>Program does not have plans to implement the strategic initiatives of Technology, Partnerships, or Campus Climate</p>	<p>Program demonstrates that it incorporates the strategic initiatives of Technology, Partnerships and/or Campus Climate.</p> <p>Program has plans to further implement the strategic initiatives of Technology, Partnerships and/or Campus Climate.</p>

Describe how your program has addressed the strategic initiatives of technology, campus climate and/or partnerships that apply to your program. What plans does your program have to further implement any of these initiatives?

Technology:

In addition to Financial 2000 and Questica, the DCR uses the Internet, PayPal, Constant Contact, QuickBooks, DonorPerfect, SiteCore, social media, and scholarship software.

- Internet / SiteCore. DCR manages the Foundation website www.sbvcfoundation.org and has purchased the domain name www.sbvcalumni.org which will become active in spring 2016. The Foundation website is updated regularly and currently includes registration and sponsorship links for the annual golf tournament. Previously, the website had a link for participating in Give Big, the annual San Bernardino campaign for Giving Tuesday. There is an online registration form for Alumni & Friends which averages 1-2 new registrants per month. Attracting alumni is an area of growth for the DCR. The DCR Director registered for the first available training on the new web management software to be held April 1, 2016. An additional need is for the website donation button to be customized for different types of donations.
- PayPal. The Foundation website includes a “Make a Donation” link that goes to PayPal. There were 166 PayPal transactions in 2014-15 (13.8 per month) for a total of \$16,380 in net proceeds, and there are 77 transactions so far for 2016-17 (8.6 per month) for a total of \$6,475 in net proceeds. PayPal makes it possible to receive credit card donations and reservations for events such as the golf tournament and gala. Recurring giving from non-employees is also set up through PayPal. An additional need is for the website donation button to be customized for different types of donations. DCR plans to continue using PayPal or a comparable system to facilitate online and credit card donations.

- Constant Contact. Event registration links such as the golf tournament and (in coming months) the 90th anniversary celebration lead directly to Constant Contact Event Spot, which is used for event outreach and registration. DCR has 4,053 active contacts on Constant Contact, sent 7 emails for 3 events in 2014-15, and has sent 6 emails for 3 events in 2015-16. Average open rate is 24.4%, resulting in 95 event registrations. DCR plans to continue and expand use of Constant Contact or similar software for outreach, event registration, and tracking.
- Social media. Social media sites include Facebook, Instagram and Twitter. Facebook has been an area of strength for the DCR. With assistance from Marketing, the DCR Director became familiar with Facebook ads and has spent approximately \$10 per day on a general Facebook ad since December 7, 2015. Content is also posted approximately twice weekly and targeted to SBVC alumni and friends. The ad has increased Facebook likes from 436 in November 2015 to 2,258 in March 2016, an increase in exposure of more than 500%. Engagement for each post has grown proportionately. Cost to date is \$1,010.
DCR plans to continue posting relevant content to Facebook and the general website. The DCR Director and Marketing Director plan to submit a workshop proposal to the Council for Resource Development (CRD) to present a social media workshop at the national CRD conference in October 2016.
- DonorPerfect. DonorPerfect is used to track donations and alumni. Currently the database holds 1,466 donor records reflecting more than \$1,000,000 in gifts since 2012. DCR plans to continue using DonorPerfect and increase the number of records for outreach and tracking purposes.
- Scholarship software. Scholarship applications are submitted and reviewed electronically. For the 2015-16 year, San Bernardino Valley College and Crafton Hills College continued to use a homegrown solution created by SBCCD staff to manage the scholarship processes at both colleges. The application is updated each year by Jason Brady and the process is very manual with lots of time being spent sorting through printed paper applications, requesting checks, tracking donors, criteria, fund balances, etc. When things are done manually, there is always room for error and with the number of awards increasing, the need for a streamlined process has become more and more of a necessity. Representatives from the District, SBVC, and CHC began meeting in October 2014 to discuss the needs of each college, the benefits of a more automated process, the in-house support needed from the District, and reviewing products from three vendors. The result was a new contract with an outside vendor to provide software that will:
 1. Streamline the Process for Students by “automatically applying” them to eligible scholarships.
 2. Enhance Committee Review and Selection by evaluating and rating students on-line.
 3. Make Awards and Notify Students online and collect thank-you letters and donor acknowledgments.
 4. Showcase Donor’s Contribution to the institution allowing students to better target thank-you letters.
 5. Customizable and Real-Time “Actionable” Reports on scholarships, applicants, awards, fund utilization, encumbered funds, and more.
 AcademicWorks was chosen as the vendor with the goal of having the new software up and running by October 1, 2016. For SBVC’s portion, College general funds were committed from the SBVC President’s budget for the 2016-17 year.

Partnerships:

The Office of Development and Community Relations actively pursues and promotes partnership with SBVC. Membership in community organizations, contact with community members, and educating the community about SBVC programs, students, successes and needs has been discussed in previous sections. DCR sees partnership as a primary charge of the office and plans to continue to prioritize this area.

Campus Culture and Climate:

Engaging the community and alumni in the richness of SBVC enhances the College's place as a jewel in the community and helps students to feel proud of their College. Fourteen (14) of the Foundation's 27 Directors are SBVC alumni, and all Board Directors talk about the quality of programs and services as they interact with their far-reaching social and professional circles. The SBVC Board Development Committee has attracted five (5) new Board Directors each of the past two years, and fondness for SBVC is evident in the volunteer hours put in by enthusiastic Board Directors. San Bernardino is often seen as a needy community, and the Foundation Board, while aware of the need and willing to discuss it, focuses on the strength of SBVC and its importance in the community over the past 90 years. The DCR shares campus news, invites the public to campus, and plans events to further celebrate and support SBVC.

VI: Previous Does Not Meets Categories

Listed below, from your most recent Program Efficacy document, are those areas which previously received "Does Not Meet." Address each area, by either describing below how your program has remedied these deficiencies, or, if these areas have been discussed elsewhere in this current document, provide the section where these discussions can be located.

First time participating in efficacy review.