San Luis Obispo County Community College District

RESOURCE DEVELOPMENT PLAN 2012-2013

Approved by the Cuesta College Foundation Board 5/7/2012
San Luis Obispo County Community College District Vision, Mission, and Values

Vision
Cuesta College is dedicated to accessible, high-quality education for the support and enhancement of student success, professional development, and the community we serve.

Mission
Cuesta College is an inclusive institution that inspires a diverse student population to achieve their educational goals.

We effectively support students in their efforts to improve foundational skills, transfer to four-year institutions, earn certificates or associate degrees, and advance in the workforce.

Through dynamic and challenging learning opportunities, Cuesta College improves lives by promoting cultural, intellectual, and professional growth. We prepare students to become engaged citizens in our increasingly complex communities and world.

Values
Access, Success, and Excellence

Mission Statement revised May 2013.
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Introduction
The 2012-2013 San Luis Obispo County Community College District Resource Development Plan is aligned with the district’s mission, vision, values, and its operational plans, including the Institutional Goals in the Educational Master Plan Addendum and the Strategic Plan 2012-2014. The Resource Development Plan lists strategies to broaden the base of support for Cuesta College. It also is in alignment with the priorities of the Cuesta College Foundation, the district’s fundraising auxiliary.

Background
Since becoming incorporated in 1973, the Cuesta College Foundation has been engaging the district and its community to develop opportunities for additional resources. The Foundation has successfully raised millions of dollars on behalf of San Luis Obispo County Community College District to support multiple needs. Since 2005, the Advancement Office has had a Resource Development Plan to guide its activities and is also incorporated into the Cuesta College Foundation Board of Director’s Manual.

In response to a number of recommendations from the accreditation commission in 2009, the district drafted a Strategic Plan and the Educational Master Plan. The district updated those documents in the spring of 2012 with the Educational Plan Addendum and the Strategic Plan 2012-2014, which spell out the Institutional Goals and Objectives for the district. The 2012-2013 Resource Development Plan supports the updated plans of the district.

Sources
The Resource Development Plan supports the district’s plans, including the Educational Master Plan Addendum, the Facilities Master Plan 2011-2021, the Strategic Plan 2012-2014 and the subsequent plans (Enrollment Management Plan, Technology Plan, Long-Term Fiscal Plan, etc).

In addition, the following resources and data were considered when writing this document:
- Cuesta College Foundation Board Manual and Bylaws
- CLARUS Community Survey Report Fall 2011
- Samples of Resource Plans from five California Community Colleges

Assumptions
The following assumptions regarding funding were made when writing this document:
As the State of California’s budget capacity continues to shrink, the Cuesta College Foundation and the Foundation/Advancement staff are key resources in identifying and generating revenue streams.

The San Luis Obispo County Community College District will continue to support the Foundation and its programs with the currently identified Advancement Office staff salaries and building costs per the MOA with the Foundation.
Additional funding to support Advancement from the district will not be realized in the near future and will include cuts.

The current unpredictable economic environment impacts the ability of the staff to expand fundraising in the community, emphasizing the need to make every dollar count.

**Assessment and Review**
The Resource Development Plan is an annual plan. The assessment and evaluation of the plan will take place in the spring of 2013 and will include:
The Executive Director of Advancement/Foundation develops operational assessments with input from the Advancement staff using data collected throughout the year (i.e.: dollars raised, number of communications sent, donor asks, event participants, etc). This will include achievements which directly correlate to the district’s mission and plans, as well as state and national trends (Voluntary Support of Education survey, Council for the Support of Education documents, etc.).

The assessments are then presented to the President/Superintendent, appropriate district committees and the Cuesta College Foundation for review and input. Updates to the Resource Development Plan will be made for the next year with additional final input from the Foundation and Advancement Office staff in the context of budget realities.

**Mission of the Resource Development Plan**
Broaden the base of support for the mission of the district within the current budget through effective communication, relationship-building, and fundraising.

**Resource Development Plan Objectives**
1: **Increase the effective communications with our constituents resulting in positive brand awareness**
Continue communications which lead to the realization of the district’s value by our stakeholders, in turn resulting in more support of the district by our better-informed community. Because of the expanded summer school goal and current accreditation status, messaging will be increased starting spring 2012. The 50th anniversary year will also require a time-specific marketing plan that will lay the groundwork for positive branding in preparation for an upcoming bond measure, potentially in fall 2014. The recent community survey recommendations (received February 2012) will be integrated by using the assumptions of the community and preferred communication methods for targeted messaging and resource allocation.

2: **Increase the amount of funds raised to meet the needs of the district**
The Cuesta College Foundation is the lead entity for fundraising. The Foundation works cooperatively with individuals and groups on campus and in the community relative to fund development. It is intended that all fund development activities be coordinated with the
Foundation in order to achieve non-duplicative and appropriately conducted activities and programs. As state funds diminish, the district is in need of additional support from other revenue sources. As its own funds contract with the district’s budget, the Advancement team will sharpen its focus on the funding priorities of the district as well as fulfill the needs of our donors.

3: Increase relationship-building opportunities with current and potential supporters of the district, including “friend-raising” of alumni and stewardship of donors
Alumni and friends need engagement and encouragement to continue to be involved in the mission and life of the district. The Alumni and Friends Association builds and maintains relationships with graduates, former students, and friends as well as identifies and cultivate donors. Our many donor programs, including recognition events, naming opportunities and legacy projects strengthen the relationship with our donors to increase future giving. In planning to celebrate the 50th anniversary, the district will create opportunities for strategic engagement with alumni and donors.

4: Increase the effectiveness of Advancement and Foundation programming through streamlined operations
Budget cuts have created an opportunity for reorganizing to increase efficiency and accountability. This reorganization will lead to defining the three areas of Advancement: marketing, engagement, and operations. Objective one will be addressed primarily by marketing; objectives two and three primarily by engagement, and objective four primarily by operations. The overarching goal is to increase accountability and common expectations.

Action Steps for 2012-2013
The following are the planned actions steps to be taken to fulfill the objectives of this plan. The action is listed on the left-hand side with a proposed timeframe for completion in the center (or ‘on-going’ for projects without an end date), and the parties responsible for implementation on the right-hand side. Any actions listed that require consultation or approval from a shared governance body at the district (i.e. Academic Senate, Planning and Budget, College Council) or through the Foundation will go through the necessary processes as indicted by the district’s Integrated Planning Manual.
1: Increase the effective communications with our constituents resulting in positive brand awareness

<table>
<thead>
<tr>
<th>Action</th>
<th>Timeframe</th>
<th>Responsible Party</th>
</tr>
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<tbody>
<tr>
<td>Assess the Summer School 2012 Marketing Plan success in achieving mid-size school status</td>
<td>Implementation March 2012 until June 2012 July 2012 assessment</td>
<td>Executive Director (ED) of Advancement/Foundation and Marketing Department</td>
</tr>
<tr>
<td>Implement messaging to internal and external stakeholders regarding accreditation status</td>
<td>Implementation through January 2013 February assessment and review</td>
<td>ED of Advancement/Foundation and Marketing Department</td>
</tr>
<tr>
<td>Launch campus-wide website</td>
<td>Launch date September 10-14 2012 Ongoing with calendared 2.0 version and further implementation of smartphone and app versions</td>
<td>ED of Advancement/Foundation and Marketing Department</td>
</tr>
<tr>
<td>Implement 50th anniversary marketing strategy</td>
<td>Finalize plan fall 2012 Implement starting spring 2013</td>
<td>ED of Advancement/Foundation and Marketing Department, President/Superintendent, Cuesta College Foundation</td>
</tr>
<tr>
<td>Review marketing strategies from 2011-2012 focused on budget and targeted, segmented messaging to create a baseline of activity and benchmarks for the coming fiscal year</td>
<td>July 2012 review of 2011-2012 June 2013 review of 2012-2013</td>
<td>ED of Advancement/Foundation and Marketing Department</td>
</tr>
<tr>
<td>Create an MOU/MOA with the County Office of Education regarding shared operations and equipment in video recording / distribution</td>
<td>September 2012</td>
<td>ED of Advancement/Foundation and Marketing Department</td>
</tr>
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### 2: Increase the amount of funds raised to meet the needs of the district

<table>
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<tr>
<th>Action</th>
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<tbody>
<tr>
<td>Using the EMP addendum, Strategic Plan 2012-2014, IPPRs and additional input from appropriate campus committees (Planning and Budget, etc.), establish campus-wide funding priorities for fundraising initiatives</td>
<td>Summer 2012</td>
<td>ED of Advancement/Foundation and Foundation Staff</td>
</tr>
<tr>
<td>Create a baseline of fundraising activity: asks, moves management activity, and giving from 2011-2012</td>
<td>Fall 2012</td>
<td>ED of Advancement/Foundation, Director of Development, Cuesta College Foundation</td>
</tr>
<tr>
<td>Increase support to the Cuesta Fund: area of greatest need support, Technology Fund and Foundation Grants</td>
<td>Spring 2012 Review success of 2011-2012 campaign</td>
<td>ED of Advancement/Foundation, Director of Development</td>
</tr>
<tr>
<td>Increase the number of Planned Gifts to the district</td>
<td>Hold seminars, with a goal to acquire new legacy gifts - one per semester</td>
<td>ED of Advancement/Foundation, Director of Development</td>
</tr>
<tr>
<td>Increase the number of Business Partners</td>
<td>Identify industries where participation needs to grow Summer 2012 Engage businesses fall 2012-Spring 2013</td>
<td>ED of Advancement/Foundation, Director of Development</td>
</tr>
<tr>
<td>Increase Major Giving, Endowment and Scholarship activity</td>
<td>Add new endowments and new scholarships in 2012-2013</td>
<td>ED of Advancement/Foundation, Director of Development</td>
</tr>
<tr>
<td>Restructure the Director of Foundation Programs position to a Director of Development position with increased fundraising goals</td>
<td>Summer 2012</td>
<td>ED of Advancement/Foundation</td>
</tr>
<tr>
<td>Increase the effectiveness of the Fundraising Committee</td>
<td>Summer 2012 review/restructure Fall/spring implementation Spring 2013 assessment</td>
<td>ED of Advancement/Foundation</td>
</tr>
<tr>
<td>Reinstate a grant writer position as part-time or contract-based</td>
<td>Fall 2012 hiring Spring implementation</td>
<td>ED of Advancement/Foundation</td>
</tr>
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</table>
3: Increase relationship-building opportunities with current and potential supporters of the district, including “friend-raising” of alumni and stewardship of donors

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</thead>
<tbody>
<tr>
<td>Increase alumni connections via e-communications, events, and activities via use of Harris Connect program</td>
<td>Summer – spring Assess fall and spring</td>
<td>ED of Advancement/Foundation, Coordinator of Foundation Programs</td>
</tr>
<tr>
<td>Implement 50th anniversary programming</td>
<td>Finalize plan fall 2012 Implement starting spring 2013</td>
<td>ED of Advancement/Foundation, Foundation Staff, Cuesta College Foundation</td>
</tr>
<tr>
<td>Align the Coordinator of Foundation Programs position with specific alumni/donor relations and stewardship goals</td>
<td>July 2012</td>
<td>ED of Advancement/Foundation</td>
</tr>
<tr>
<td>Create an inventory of business and civic partners</td>
<td>Fall 2012 to spring 2013</td>
<td>ED of Advancement/Foundation</td>
</tr>
</tbody>
</table>

4: Increase the effectiveness of advancement and foundation programming through streamlined operations

<table>
<thead>
<tr>
<th>Action</th>
<th>Timeframe</th>
<th>Responsible Party</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update policies and procedures in operations in Advancement and Foundation</td>
<td>July 2012 to begin ID process December 2012 for completion June 2013 assessment and internal review</td>
<td>ED of Advancement/Foundation, Cuesta College Foundation Executive Committee</td>
</tr>
<tr>
<td>Review and streamline gift processing</td>
<td>June 2012 review for summer 2013 implementation</td>
<td>ED of Advancement/Foundation, Foundation staff especially accounting</td>
</tr>
<tr>
<td>Input accurate alumni data to support communications, identify target groups for special 50th communications from database</td>
<td>Fall 2013 target groups identified with Marketing Plan</td>
<td>ED of Advancement/Foundation, Foundation Staff</td>
</tr>
<tr>
<td>Meet targeted professional development needs for staff</td>
<td>Summer 2012-spring 2013</td>
<td>ED of Advancement/Foundation</td>
</tr>
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Appendix A

2012-2013 Resource Development Plan and Integration with District Plans

1: Increase the effective communications with our constituents resulting in positive brand awareness
   EMP Addendum Institutional Goal 2: Build a sustainable base of enrollment
   EMP Addendum Institutional Goal 5: Strengthen community partnerships via communication tools and marketing strategies
   Strategic Plan 2012-2014 Institutional Goal 2.1.1: Prepare for campaign elements to be completed in 2013-2014 year
   Technology Plan Goal 10: Website regularly updated and accessible – launch in September 2012 by Marketing Department and Computer Services
   Enrollment Management Plan: See above Institutional Goal

2: Increase the amount of funds raised to meet the needs of the district
   EMP Addendum Institutional Goal 1: Enhance programs and services to promote student success by identifying district priorities and raising funds to meet the needs
   EMP Addendum Institutional Goal 5: Strengthen community partnerships via fundraising and engagement opportunities
   Technology Plan Goal 4: Identify external sources of funding for technology
   Technology Plan Goal 5: Identify external sources of funding for technology
   Facilities Plan: Pending capital needs, provide resources as identified by the district evidences by the South County initiative, “40 Trees” project and Cougar Park referenced in the plan
   Long-Term Fiscal Plan Appendix A: Secure additional revenue by increasing Foundation support

3: Increase relationship-building opportunities with current and potential supporters of the district, including “friend-raising” of alumni and stewardship of donors
   EMP Addendum Institutional Goal 5: Strengthen community partnerships a district-wide inventory of engagement as a benchmark
   Strategic Plan 2012-2014 Institutional Goal 5.1: Strengthen community partnerships a district-wide inventory of engagement as a benchmark

4: Increase the effectiveness of advancement and foundation programming through streamlined operations
   EMP Addendum Institutional Goal 3 and 4: Staff will participate in training for both the district’s updated governance process and integrated planning process as well as best practices in their fields.
Appendix B:

Original Resource Development Plan (2005) Plan was reviewed and amended annually by the Foundation Staff.

Cuesta College Foundation Resource Development Plan
The Cuesta College Foundation is the lead entity for resource development. The Foundation works cooperatively with individuals and groups on campus and in the community relative to fund development. It is intended that all fund development activities be coordinated with the Foundation in order to achieve non-duplicative and appropriately conducted activities.

Priorities/Duties of the Foundation

- Broadening the base of support for the college
- Increasing charitable gifts and other alternative sources of revenue
- Increasing cooperation and information exchange and provide fund-raising counsel to college staff, upon request. This will include such assistance as strategizing approaches to donors, discussing special events, preparing funding proposals, and other related activities.
- Minimizing duplication of effort
- Increasing the overall professionalism and effectiveness of development, including: fund-raising events, individual solicitation, grantsmanship, and all forms of solicitation
- Implementing fund development policies
- Directing a comprehensive, ongoing fund development program, including the following staff recommended programs:
  - Alumni Association
  - Alumni Legacy Program
  - Ambassador Program
  - Annual Fund
  - Business Partners
  - Cuesta Colleagues
  - Cuesta Gold
  - Donor Recognition
  - Endowment/Scholarship Programs
  - Naming Opportunities
  - Planned Giving and Major Gifts
  - Pillars
  - Staff Emeritus
Alumni Association
Purpose: The Alumni and Friends Association fosters continuing college relationships with former students and generates support for Cuesta College through scholarships and gifts. Open to all graduates, college employees, former students and friends of the college, the Association supports the annual Honored Alum award and maintains contact through invitations to events and by other promotional material.

1. Goal: Develop meaningful connections with current students in order to establish a continued relationship long into the future.
   Objective: Each Foundation staff member will attend one student event each semester.
   Objective: Establish a “student ambassador” program, which will provide for students to serve as “greeters” at Foundation events
   Objective: Sponsor graduation event and other appropriate student events

2. Goal: Develop and maintain accurate alumni data base
   Objective: Target alums as valuable “lobbying” source for College issues
   Objective: Design on-going “search campaign” ads to continually find and identify Cuesta alums
   Objective: Mail at least two alumni specific items to alums each year including:
   - Alum annual magazine/booklet
   - Postcards/fliers announcing events/activities
   - Connections Newsletter including alum pages
   Objective: Update alum brochure to be placed in high traffic areas on campus encourage alum involvement

3. Goal: Build and maintain relationships with graduates, former students, and friends as well as identify and cultivate potential donors
   Objective: Host at least two alumni-sponsored events each year, such as reunions or mixers
   Objective: Develop alumni profile each month for local newspapers

4. Goal: Establish Alumni Park, which will provide on-going awareness and connection between community and college, as well as on-going fund raising project (“memory” brick walkways, benches, tables, cougar, and other donor recognition possibilities)

Alumni Legacy
Purpose: The Alumni Legacy Project joined alumni and community leaders together to create a legacy to express gratitude to faculty, staff, and college leadership. Purchase of a cougar (two sizes are available) supports the costs of the project and a student scholarship as the alumni gift to Cuesta College.

1. Goal: Completion of Project
   Objective: Coordinate with appropriate faculty/staff in site selection
   Objective: Coordinate with appropriate staff to determine whether or Not Cougar can be poured at campus foundry
   Objective: Host “installation” event
Ambassador Program
Purpose: The Ambassador Program offers unique opportunities for Board members who want personal contact with faculty and students. Ambassadors partner with academic divisions to expand opportunities in resource development for educational programs and services. It means grassroots interaction among Foundation board members and college faculty in a forum for informed interaction and meaningful results.

Cuesta Fund
Purpose: The Annual Fund includes a variety of approaches all designed to entice selected groups to give to Cuesta College on a continuing, unrestricted basis year after year. The purpose of the annual fund is to build a donor base, cultivate larger gifts over the years, and to establish a pattern of giving with our donors. The cultivation targets for the annual fund include those individuals who have a strong connection to the college because they or their children were or are students, employees or others who have been served by the college in a direct way.

1. Goal: Expand community giving by 25 percent each year
   Objective: Develop strategies for appeal letters (such as first letter to all on mailing list, second letter to those who have not responded, and so on)

2. Goal: Expand staff giving to 100 percent by creating a comprehensive approach
   Objective: Exposure at “Opening Day” and other staff event by setting up a table in the lobby area with signs and incentive gifts
   Objective: Establish a mini-campaign designed to create new interest, with a “staff giving” day (someone in cougar suit, signs and promotional material in Admin Bldg.), magnets (I love Cuesta) or stickers “I’m a giver”???
   Objective: Create a “moniker” for Cuesta Colleagues (such as, “cool cat”)
   Objective: Provide attractive “staff giving” packets for new employee orientation and personally follow-up in 30 days
   Objective: Send annual thank-you letter as well as “fun” thank-you emails for each payroll deduction
   Objective: Have monthly drawings for “small” gift from list of employee donors and announce winner via email and CC News (gifts provided by donations from local businesses)
   Objective: Develop and provide material designed for staff giving outlining estate giving options as well as gift through life insurance

3. Goal: Expand Retired Staff Giving Program
   Objective: Send newly retired employees a “Please keep on giving” letter with an EFT form
   Objective: Host/sponsor a reunion/mixer once a year for retired staff
   Objective: Develop and provide material designed for retired staff giving outlining planned giving options as well as gifts through life insurance

4. Goal: Reach 100 percent Board Members’ commitment to unrestricted fund
Objective: Develop commitment form to be completed by Board members once each year asking them to commit x amount to the unrestricted fund first. Other donations and soft credits would be in addition to the unrestricted gift.

5. Goal: Generate Student Giving Program to establish a “pattern of giving” for the future
   Objective: Provide a space for giving on registration forms (Would like to give $1 (or other amount) to the Alumni Association
   Objective: Advertise in class schedule, catalog, and other college material
   Objective: Create Student Giving Campaign material

Business Partners
Purpose: Business Partners is a membership open to CEO’s and other senior executives throughout San Luis Obispo County and includes many members from the Foundation Board of Directors. Business Partners promotes two-way communication between Cuesta College and the county business community, enabling the college to better serve the educational and training needs of local employers and employees. The program enriches and enhances the college’s role in local economic development by involving business leaders in the forefront of new directions and partnerships for education.
   1. Goal: Expand Business Partners’ Program by 25 percent each year
      Objective: Name “figurehead” chairperson to assist with promotion
      Objective: Arrange for one major keynote speaker each year
      Objective: Host at least two roundtables each year
      Objective: Design/arrange for 2-3 tours of specific facilities throughout the year lead by Foundation Board members (with involvement of student ambassadors)
      Objective: Design mini-campaign ads for Connections as well as other appropriate community material (such as, chamber newsletters)
      Objective: Develop story/profile of BP each month for local newspapers
      Objective: Develop CEU seminars for professionals providing discounts to BP members

The Pillars
Purpose: The purpose of The Pillars is to provide an opportunity for Board members to maintain a meaningful connection with members of the Foundation Board once they have resigned from Board service.
   1. Goal: Make contact through letters from Berna and Marie explaining The Pillars Program to former board members and follow up with telephone calls to answer Any questions
      Objective: Draft letters
   2. Goal: Host one event on campus bringing former Board members together with current members.
Naming Opportunities
Purpose: As a part of the overall recognition plan for donors, the Cuesta College Foundation may provide “naming opportunities” as a means to recognize significant monetary contributions to the Foundation.
   1. Goal: Provide a master plan of naming opportunities that is readily available
      For review by donors, which will encourage and motivate giving
      Objective: Establish a “Master Plan” of naming opportunities by working with appropriate College staff and/or committees
      Objective: Create innovative naming opportunities, such as an Alumni Park and memory walkway

Donor Recognition
Purpose: Provide ways to express on-going donor appreciation
   1. Goal: Establish large donor recognitions plaque (similar to the retiree tribute) plaque on SLO Campus
      Objective: Design wall according to levels of gifts
      Objective: Determine location (Administration Lobby?)

Endowment/Scholarship Programs
Purpose: Endowments create a lifelong relationship between Cuesta College and the donor. An endowed gift keeps giving over time and encourages a continuing relationship between the donor and the College. Each gift designated as an endowment is a source of permanent financial support, and a donor who creates an endowed gift is assured that it will grow and continue to support Cuesta College’s mission, programs, and services.
   1. Goal: Continue to solicit endowment/scholarship funds

Planned Giving and Major Gifts
Purpose of Planned Giving Program: Provide a variety of giving options for donors through estate planning
   1. Goal: To secure a source of future revenue for Cuesta College
      Objective: Establish a Planned Gifts Committee made up of estate planning professionals, who will serve as ambassadors to the community, provide insight and professional advice to the Foundation Board, assist with arranging professional estate planning seminars, as well as develop a list of estate planning professionals willing to consult with potential donors.
      Purpose of major gifts is to fund needed projects and programs identified and prioritized by College.
   1. Goal: Identify and cultivate at least two to three new major donors
      Objective: Research lists of those individuals who have continuously made a gift to Cuesta College
      Objective: Research local corporations/vendors who have a connection to Cuesta College
      Objective: Work with current Board members in identifying new donors
Objective: Identify large donors to other institutions
Objective: Spend more time on research

Cuesta Gold
Purpose: Cuesta Gold is a way to recognize those special friends of Cuesta College who have generously remembered the college through their estate plans or other estate plan arrangements. The specific purpose of Cuesta Gold is to encourage active support and participation of donors, to stimulate an increased pattern of giving through estate planning, and to recognize and appreciate the generosity of the benefactors of Cuesta College.

1. Goal: Develop Cuesta Gold brochure to be placed in offices of estate planning professionals (with their agreement) or for them to hand out as needed.