COMPREHENSIVE PROGRAM REVIEW
Gavilan College Foundation- Auxiliary Organization

I – MAIN
Academic Year: 2026–2027
Originator: Anna Quinones – Foundation Director
Division: Administrative Offices
Department: Gavilan College Foundation (Auxiliary)

II - CO-CONTRIBUTOR (S)
Jennifer Dinis

III – PROGRAM MISSION AND ACCOMPLISHMENTS
Program Overview & Alignment to Mission

Gavilan College Mission Statement
Through equitable access and comprehensive support in a welcoming, inclusive environment, Gavilan College guides students of diverse backgrounds to achieve academically and pursue lifelong learning. We prepare students for transfer success, career advancement, and meaningful community participation.

The Gavilan College Foundation, a nonprofit auxiliary organization, supports the College's mission by generating philanthropic resources that expand equitable access, strengthen comprehensive student support, and advance academic opportunity. Through private fundraising, the Foundation funds scholarships, Basic Needs initiatives, academic programs, and mission-aligned priorities that directly support student retention, persistence, and completion.

The Foundation Pre-FY25 operational gap consisted of the following:
- Limited active Foundation management for a few years
- Regulatory delinquency with the State of California
- Inconsistent donor documentation practices
- No reliable donor retention benchmarking
- Limited technological infrastructure (primarily check-based giving)
- No formalized non-cash gift acceptance systems

In FY25–26, the Foundation was managing approximately $350,000 in annual contributed revenue and $1.1 million in total assets. During this period, the Foundation strengthened institutional infrastructure by achieving full IRS compliance for monetary and non-cash gifts, modernizing donor documentation practices, renewing Articles of Incorporation, maintaining regulatory good standing, and reaffirming adherence to the Donor Bill of Rights. The Foundation implemented **Blackbaud Raiser's Edge**, improving CRM integrity, donor segmentation, and reporting capacity.

In early 2026, a $15,000 stock gift was delayed due to limited non-cash gift acceptance infrastructure. This experience highlighted the need to modernize and diversify giving vehicles to include stock, cryptocurrency, Donor-Advised Fund (DAF) distributions, Qualified Charitable Distributions (QCDs), and Required Minimum Distribution (RMD) gifts. Diversified gift readiness is essential to protect revenue opportunities and maintain donor confidence.
Campaign efforts such as Giving Tuesday and student-led Basic Needs fundraising reinforced the Foundation's commitment to addressing food and housing insecurity. Continued technology modernization, governance compliance, and structured stewardship systems position the Foundation to transition from reactive operations to sustainable advancement practices that ensure stable funding for scholarships and equity-centered programming.

IV – STUDENT AND PROGRAM OUTCOMES

Planned Improvements

Over the next three years, the Foundation will:

- Establish baseline donor retention metrics and target a minimum 5% annual improvement in renewal rates
- Increase contributed revenue by 4–6% annually through diversified giving strategies
- Expand non-cash and legacy gift vehicles to increase asset-based gift volume
- Develop integrated annual, recurring, and planned giving programs to create predictable and sustainable revenue streams
- Strengthen stewardship reporting transparency to stakeholders

Collectively, these actions position the Foundation to increase stable philanthropic investment in scholarships, emergency assistance, and equity-centered programming that directly supports student persistence, completion, and equitable access to a Gavilan College education.

- Key Performance Indicators (Baseline FY2025)
- Contributed Revenue: $350,000
- Total Assets: $1.1 million
- Donor Retention Rate: Benchmark establishment in progress (CRM Phase 1 implementation complete)

Compliance Status: Full IRS compliance achieved; regulatory good standing restored.

Financial Projection (3-Year Conservative Model)

Year	Base Growth (4–6%)	Stock Gift Impact	Projected Total
FY27	$364,000	$15,000	$379,000
FY28	$382,200	$15,000	$397,200
FY29	$405,132	$15,000	$420,132

The above projection reflects phased, responsible conservative growth aligned with infrastructure modernization, diversified gift access, and improved donor retention.

Outcome Trends

The primary trend identified is infrastructure maturation. Revenue remains steady but modest, and donor retention metrics are in early benchmarking stages following CRM modernization. The Foundation's advancement operations remain centralized, limiting scalability without expanded systems and capacity.

The Foundation has demonstrated measurable progress in:

- Restoring compliance and governance integrity
- Implementing CRM technology for segmentation and reporting
- Improving online giving functionality
- Expanding diversified giving readiness
- Supporting online Basic Needs fundraising initiatives

These improvements strengthen revenue stability, enhance donor confidence, and increase sustainable funding for scholarships and equity-centered student support.

V – EQUITY

The Foundation advances equity by generating private philanthropic support for scholarships, emergency grants, and Basic Needs initiatives that directly serve historically underserved students. By strengthening donor retention and expanding diversified gift acceptance, the Foundation increases predictable and sustainable funding streams that reduce financial barriers to student success. Stable philanthropic revenue enables timely scholarship awards, emergency assistance, and access to essential resources such as food and housing support — ensuring students can persist, complete their education, and fully participate in the Gavilan College community.

The Foundation will track the percentage of donor-funded scholarships designated for historically underserved student populations and report annually on distribution alignment with equity priorities.

Equity Infrastructure Strengthening

Philanthropic funds support Basic Needs initiatives, emergency assistance, scholarships, student-centered programming, and unrestricted general support that allows the College to respond to emerging equity priorities. Recent student-led fundraising efforts addressing food insecurity reflect a growing culture of shared responsibility and equity-centered engagement across campus and within the broader community.

To further strengthen equitable outcomes, the Foundation will:

- Expand access to non-cash and legacy giving through implementation of the Smart Giving Suite (FreeWill)
- Improve transparency and donor confidence through structured stewardship and impact reporting
- Align donor-funded scholarships with the needs of historically underserved student populations
- Ensure equitable access to tribute, honorary, and legacy giving opportunities

By stabilizing and diversifying philanthropic revenue, the Foundation strengthens the College's long-term capacity to reduce financial barriers, expand access to essential resources, and close opportunity gaps for historically underserved students.

VI – LEARNING AND AREA OUTCOME

As a nonprofit auxiliary organization, the Gavilan College Foundation does not deliver instruction and is therefore assessed through **Service Area Outcomes (SAOs)** rather than course or program learning outcomes. SAOs are evaluated through Foundation Board oversight, annual financial audits, donor stewardship measures, donor retention benchmarks, and revenue performance metrics. SAOs are currently **not mapped in CurriQunet**; SAO tracking and documentation are maintained through Foundation operational reporting and Board governance processes. Service Area Outcomes focus on donor engagement and stewardship effectiveness, compliance integrity, and revenue stability.

VII – OUTCOME ASSESSMENTS

1. Service Area Outcomes (SAO)

As a non-instructional auxiliary organization, the Foundation evaluates Service Area Outcomes focused on compliance, donor stewardship, operational capacity, and revenue sustainability. Assessment review for FY25–26 indicates successful restoration of full IRS compliance, renewal of governing documents, and full implementation of Blackbaud Raiser's Edge to improve CRM accuracy and reporting integrity.

Assessment findings identified three measurable gaps:

1) absence of baseline donor retention metrics,

2) limited technological infrastructure to efficiently access and process non-cash donor gifts, and

3) lack of diversified gift vehicles aligned with modern philanthropic practices.

In early 2026, a $15,000 stock gift was delayed due to infrastructure limitations, illustrating operational risk in a $350,000 revenue model. Beginning FY26–27, the Foundation will establish donor retention benchmarks and target a minimum 5% annual improvement in renewal rates, implement the Smart Giving Suite to expand stock, DAF, QCD, crypto, and estate gift access, and track asset-based gift volume growth. Success will be measured through documented retention rates, increased non-cash gift transactions, diversified revenue mix, and sustained annual revenue growth of 4–6%.

2. Institutional Learning Outcomes (ILO)

The Foundation's SAOs directly support Institutional Learning Outcomes by increasing equitable access to financial resources that reduce barriers to student persistence and completion. Strengthened philanthropic infrastructure ensures predictable scholarship funding, improved Basic Needs support, and stable multiyear investment in student success initiatives.

3. SAO Success and Improvement Plan

The Foundation has achieved key compliance and governance outcomes and is transitioning into a performance-measurement phase. Assessment patterns show restored regulatory standing and improved data integrity, while highlighting infrastructure modernization as the next critical growth area.

The next assessment cycle will focus on measurable advancement indicators: improved donor retention, increased asset-based gift volume, expanded legacy commitments, and stabilized revenue forecasting. These improvements strengthen financial sustainability and expand long-term support for scholarships and equity-centered programming.

Findings from annual retention and revenue analysis will inform adjustments to donor segmentation strategy, campaign structure, and staffing allocation to ensure continuous improvement.

VIII – CURRICULUM AND COURSE OFFERINGS ANALYSIS

The Gavilan College Foundation is a nonprofit auxiliary organization and does not offer courses, degrees, or instructional programming. Therefore, curriculum development, course sequencing, and instructional delivery methods are not directly applicable to the Foundation's operations.

However, the Foundation plays a supportive role in strengthening academic programs and student access to curriculum by generating philanthropic resources that fund scholarships, instructional equipment, program enhancements, and student support services. Foundation-supported scholarships reduce financial barriers that may otherwise prevent students from enrolling in required coursework or maintaining full-time enrollment necessary for timely completion.

The Foundation collaborates with academic departments and College leadership to align donor-funded scholarships and programmatic gifts with institutional priorities, including transfer preparation, career technical education, and workforce development initiatives. By stabilizing philanthropic revenue and expanding diversified giving capacity, the Foundation strengthens the College's ability to sustain instructional offerings and student-centered programming.

While the Foundation does not manage curriculum directly, its fundraising and stewardship activities contribute to student access, program continuity, and the broader institutional capacity to deliver high-quality academic offerings across modalities and campus locations.

IX – PROGRAM AND RESOURCE ANALYSIS

Current Staffing FY25–26

- Full-Time Manager/Administrator: 1
- Part-Time Shared Executive Assistant: 0.5 FTE

The Foundation currently operates with centralized leadership and limited administrative capacity. Advancement functions, donor stewardship, compliance oversight, and fundraising strategy are managed within this structure, limiting scalability and growth potential.

Proposed FY26–27 Addition

Part-Time Advancement Manager (20 hours/week) – Foundation-funded

The proposed Advancement Manager position will focus on donor retention, diversified gift development, stewardship reporting, and revenue growth strategy. This role is designed as a phased investment aligned with measurable revenue growth targets and long-term sustainability.

X – EVALUATION OF RESOURCE ALLOCATIONS

FY26–27 Proposed Foundation-Funded Investments

Item	Amount
Matching Gift Software (Double the Donation – DTD)	$999
Smart Giving Suite (FreeWill)	$8,000
Professional Development	$5,000
Scholarship & Donor Celebration and donor engagement activities	$17,300
Foundation Marketing & Campaign Development	$15,000
Accounting Manager Position (20 hrs/week, phased) **Year 1: 10 hrs./week | Year 2: 20 hrs./week**	$50,000 max
Advancement Manager Position (20 hrs/week, phased) **Year 1: 10 hrs./week | Year 2: 20 hrs./week**	$50,000 max
Total Estimated Annual Investment (Fully Implemented)	**$146,299**

Note: The Advancement and Accounting Manager position will be phased in based on operational demand and revenue benchmarks.

Year 1: 10 hrs./week | Year 2: 20 hrs./week

Strategic Investment Overview

The combined $8,999 software investment strengthens gift accessibility and revenue diversification. The Smart Giving Suite enables acceptance of stock, cryptocurrency, Donor-Advised Fund (DAF) distributions, Qualified Charitable Distributions (QCDs), and Required Minimum Distribution (RMD) gifts—expanding access to tax-efficient giving vehicles that often result in larger contributions.

In addition, dedicated staffing and marketing investments build the operational capacity and internal controls required to scale diversified giving and sustain donor engagement.

A recent $15,000 stock gift—delayed due to infrastructure limitations—demonstrates that one additional asset-based gift would more than offset the annual Smart Giving Suite investment.

The Double the Donation (DTD) matching gift platform was secured at a 75% discounted rate for three years, significantly reducing financial risk. Matching gift revenue has already exceeded the annual subscription cost, effectively making the system cost-neutral while unlocking additional employer-supported contributions.

The addition of a dedicated Foundation Marketing Budget and phased Accounting Manager strengthens advancement scalability, internal controls, and donor communication infrastructure. Together with the Advancement Manager position, these investments build a comprehensive advancement model that balances revenue growth with compliance integrity and long-term sustainability.

Implementation will be evaluated against measurable indicators including:

- Asset-based gift volume growth
- Matching gift revenue
- Donor retention improvement (minimum 5% annual increase)
- Campaign participation rates
- Recurring gift enrollment growth
- Sustained 4–6% annual revenue growth

These investments represent responsible, phased infrastructure development aligned with institutional sustainability goals.

Financial Sustainability Statement

Why Infrastructure First

The Foundation’s FY25 baseline of approximately **$350,000 in annual contributed revenue** and **$1.1 million in total assets** requires an infrastructure-first strategy that protects compliance, reduces operational risk, and expands access to modern giving methods. These proposed investments are a **multi-year, performance-aligned infrastructure plan** designed to strengthen long-term financial sustainability without increasing fixed overhead prematurely. Initial implementation prioritizes compliance integrity, internal controls, diversified revenue access, and donor retention systems necessary for scalable, predictable growth.

Performance-Aligned Investments and Immediate ROI

The **Smart Giving Suite (FreeWill)** and **Double the Donation (DTD)** platforms expand access to asset-based and employer-matched gifts, enabling the Foundation to capture revenue streams that were previously inaccessible. A recent **$15,000 stock gift delay** demonstrated the revenue and reputational risk of limited non-cash gift infrastructure. One additional asset-based gift at this level exceeds the annual cost of the Smart Giving Suite, while matching gift revenue has already offset the annual DTD subscription cost—demonstrating immediate return and cost neutrality.

Staffing Model Designed for Fiscal Responsibility and Risk Reduction

The proposed **Part-time Advancement Manager** is a revenue-aligned role tied to measurable benchmarks. With a **$350,000 revenue baseline**, a conservative **4–6% annual growth target** yields approximately **$14,000–$21,000** in new revenue per year, with additional upside from improved donor retention, increased non-cash gifts, and planned giving commitments. Even modest retention gains strengthen donor lifetime value and reduce year-to-year revenue volatility.

The proposed **Part-time Accounting Manager** strengthens segregation of duties, gift processing accuracy, reconciliation reliability, and audit readiness as diversified gift complexity increases. **Separating advancement operations from financial processing reduces compliance risk, strengthens internal controls, and protects institutional credibility.** Both positions are structured as **phased investments**, scaling hours based on operational demand and performance benchmarks to maintain fiscal discipline.

Collective Impact on Long-Term Sustainability

Collectively, these investments build scalable advancement infrastructure that strengthens donor confidence, improves transparency and governance oversight, stabilizes multi-year revenue forecasting, and expands sustainable philanthropic support for scholarships, Basic Needs initiatives, and equity-centered student success programs. Progress will be evaluated annually using measurable indicators, including: donor retention improvement, non-cash and matching gift volume, recurring gift growth, campaign participation, and sustained year-over-year contributed revenue growth.

The Foundation's **$500,000 stretch goal** assumes accelerated growth through expanded asset-based giving and planned gift commitments beyond the conservative 4–6% annual model.

1. Professional Development – $5,000
As a nonprofit auxiliary managing charitable contributions and non-cash gifts, continued training in IRS compliance, nonprofit governance, advancement strategy, and donor stewardship is essential.
This investment supports:

- Ongoing IRS compliance education
- Donor relations best practices
- Advancement systems optimization
- Board governance support
- Risk mitigation

For a small foundation, professional development protects against costly compliance errors and strengthens institutional credibility.

2. Scholarship Award & Donor Celebration – $10,000
This allocation strengthens donor retention and impact reporting by formalizing recognition efforts.
Research consistently shows donor retention is significantly higher when impact is visible, and gratitude is intentional. The scholarship and donor celebration:

- Demonstrates student impact
- Builds donor engagement and reinforces donor trust
- Encourages recurring and major gifts
- Engages board members in stewardship
- Supports community-building

This investment directly supports revenue stabilization rather than event-based fundraising expansion.

3. Smart Giving Suite: FreeWill and Matching Gift -Double the Donation (DTD) – $9,000
This is a long-term strategic investment in non-cash gifts, legacy giving, and planned giving.
FreeWill:

- Removing barriers to estate planning
- Encourages bequests and beneficiary designations
- Expands access to legacy giving
- Positions the Foundation for transformational gifts
- Builds future endowment stability
- Matching Gifts increasing giving revenue through donor matches

Given total assets of $1.1 million, strengthening planned giving capacity is essential for long-term sustainability. Legacy giving aligns with multiyear institutional growth rather than annual campaign dependency.

4. Advancement Manager (20 hrs/week) – $50,000 max
This is the foundational infrastructure investment.
With approximately **$350,000** in annual revenue contributed, the Foundation currently operates without dedicated advancement staff beyond the Director. This creates risk concentration and limits scalability.
The Advancement Manager will:

- Establish donor retention baseline metrics
- Manage annual appeals
- Improve CRM data integrity
- Ensure timely constituent acknowledgments and communications
- Support stewardship reporting
- Reduce single-person dependency
- Systematize advancement operations

5. Accounting Manager Position (20 hrs/week, Phased) – $50,000 Max
This is a foundational financial infrastructure investment.

With approximately **$350,000 in annual contributed revenue**, the Foundation currently operates with limited dedicated capacity for day-to-day accounting support beyond the Director's oversight and existing shared systems. As the Foundation expands and diversifies revenue streams (including non-cash gifts, matching gifts, and planned giving), this creates **risk concentration**, increases the likelihood of processing delays, and limits the Foundation's ability to scale with strong internal controls and audit readiness.

The Accounting Manager will:

- **Handle gift processing and financial reconciliation** to ensure accurate recording and classification of contributions
- **Maintain audit readiness** through organized documentation, compliance records, and transaction support
- **Support financial reporting** for the Foundation Board, College leadership, and stakeholders to strengthen transparency
- **Track restricted vs. unrestricted funds** to ensure donor intent and fund compliance integrity
- **Coordinate donor acknowledgment support** by aligning gift records, documentation, and receipting workflows
- **Strengthen stewardship reporting** through accurate financial data and timely reporting structures
- **Reduce single-person dependency** by separating advancement operations from financial processing responsibilities
- **Systematize financial operations** to support growth, diversified giving, and long-term sustainability

The role is intentionally scaled to **part-time (20 hours/week)** and designed to be **phased in gradually** as operational needs and budget capacity allow. This phased staffing model protects fiscal responsibility while strengthening compliance integrity, reducing operational risk, and enabling sustainable advancement growth.

6. Foundation Marketing Budget – $15,000 Annually

This is a foundational advancement infrastructure investment.

The Foundation currently generates approximately $300,000–$350,000 in annual contributed revenue without a dedicated marketing budget. Historically, Foundation marketing costs were dispersed across the College Marketing Department and the President's budget, limiting strategic autonomy, campaign consistency, and measurable return on investment.

Establishing a centralized **$15,000 annual Foundation marketing allocation** creates dedicated advancement infrastructure aligned directly to revenue growth and donor engagement goals.

The Foundation Marketing Budget will:

- Support annual fundraising campaigns, including Giving Tuesday and Basic Needs initiatives
- Strengthen donor acquisition and retention communications
- Develop stewardship materials and impact reports
- Promote Foundation-hosted events and scholarship celebrations
- Support digital fundraising platforms and targeted outreach
- Enhance alumni and community engagement strategies
- Improve brand consistency and philanthropic storytelling
- Enable measurable campaign performance tracking and ROI evaluation

Centralized marketing funding strengthens strategic donor communication, improves segmentation and targeting through CRM integration, and increases revenue predictability. Without dedicated marketing resources, growth remains reactive rather than strategic.

The allocation is intentionally modest and structured as an ongoing operational investment tied to measurable revenue benchmarks. Even incremental increases in donor participation, recurring gifts, or mid-level donor upgrades can offset a significant portion of this investment. Success will also be measured through campaign participation rates, donor acquisition, recurring gift enrollments, and year-over-year appeal performance.

This strategic investment supports revenue growth toward the $500,000 stretch goal while stabilizing long-term philanthropic sustainability. Success will also be measured through campaign participation rates, donor acquisition, recurring gift enrollments, and year-over-year appeal performance.

XI – INTEGRATED PLANNING AND INITIATIVES

The Foundation partners with Student Services, Basic Needs programs, Academic Affairs, and Guided Pathways initiatives to align philanthropic support with institutional priorities. Collaboration focuses on expanding scholarship access, strengthening emergency assistance, and supporting student persistence initiatives that remove financial barriers to completion.

Over the next three years, the Foundation will work with College leadership to align donor-funded scholarships with Guided Pathways momentum points, including transfer readiness, career education completion, and equity-centered retention strategies. Collaboration with Basic Needs programs will continue to prioritize food and housing insecurity initiatives supported through targeted fundraising campaigns.

The Foundation also supports grant-aligned efforts by providing matching funds where appropriate and strengthening private support to sustain programs beyond grant cycles. As philanthropic infrastructure modernizes, the Foundation will enhance data-sharing coordination with College leadership to ensure donor intent aligns with student success metrics.

These integrated efforts position the Foundation as a strategic partner in institutional planning, strengthening sustainable funding streams that directly support student access, persistence, and completion.

XII – OTHER OPPORTUNITIES AND CHALLENGES

1. Opportunities and Threats

Opportunities include modernization of philanthropic infrastructure, expansion of non-cash and legacy giving, and strengthened donor engagement through improved stewardship systems. Increasing community interest in workforce development, career technical education, and Basic Needs support presents potential for diversified fundraising growth aligned with regional labor market needs.

Primary challenges include revenue volatility due to reliance on cash-based gifts, limited historical retention benchmarking, and growing competition for philanthropic dollars in an increasingly digital giving environment. Economic fluctuations may also impact discretionary giving patterns.

Over the next three years, the Foundation’s plan focuses on stabilizing revenue through diversified gift vehicles, formalized donor retention tracking, expanded legacy commitments, and structured advancement planning. By investing in infrastructure and measurable performance benchmarks, the Foundation seeks to reduce financial risk and strengthen long-term sustainability.

2. New Leadership and Staffing- Practices to Maintain

The Foundation has observed increased donor responsiveness to new leadership and staffing and the rollout of digital engagement, including online giving platforms, electronic communications, and virtual campaign participation. Online Basic Needs fundraising efforts demonstrated that donors respond positively to clear, mission-driven digital appeals.

The Foundation will maintain enhanced online giving functionality, digital stewardship communications, and streamlined virtual engagement opportunities. These practices expand donor accessibility, particularly for alumni and community members who may not attend in-person events.

Additionally, remote workflow capabilities have improved administrative efficiency, documentation accuracy, and CRM reporting integrity, strengthening compliance and reducing processing delays.

Maintaining these operational efficiencies supports compliance and reduces processing delays.

While in-person stewardship events remain important, a hybrid engagement model allows broader participation and increased inclusivity. Sustaining digital infrastructure ensures the Foundation remains accessible, competitive, and responsive to evolving donor preferences.

3. Emerging or Exacerbated Issues

Financial insecurity among students continues to impact persistence and completion rates. Demand for scholarships and emergency assistance remains high, particularly among historically underserved populations. Without stabilized philanthropic revenue, the College's ability to address these needs may be constrained.

Additionally, philanthropic competition has intensified, requiring more sophisticated infrastructure to remain competitive in asset-based and planned giving markets. Foundations lacking diversified gift acceptance may lose potential contributions to institutions with modernized systems.

Operationally, limited staffing capacity constrains scalability and strategic outreach. Without expanded advancement infrastructure, revenue growth may remain incremental rather than transformative. Addressing these challenges requires sustained investment in diversified gift capacity, structured donor retention strategies, and phased staffing growth aligned with measurable revenue benchmarks. By proactively strengthening advancement systems, the Foundation mitigates long-term financial risk and expands equitable student support capacity.

Assessment results will be reviewed annually to adjust retention strategies, diversify revenue mix, and reallocate advancement resources as needed to meet performance benchmarks. Failure to modernize gift infrastructure presents both financial risk and competitive disadvantage in attracting asset-based and planned gifts.

XIII – NEW GOALS

Goal 1: Strengthen Sustainable Philanthropic Capacity

Increase annual contributed revenue from $350,000 to $420,000 (personal stretch goal of $500,000) by the end of FY2028 through structured donor retention strategies, diversified non-cash gift acceptance, expanded legacy giving, and phased advancement infrastructure development. **The $500,000 stretch goal assumes accelerated asset-based giving and planned gift commitments beyond the conservative 4–6% annual growth model.**

Alignment to Strategic Goal:
Institutional Sustainability and Student Success
Alignment to SAO:
Strengthen donor retention, diversify revenue streams, and increase predictable philanthropic support to ensure long-term financial stability.
Connection to Mission, Strategic Plan, and SAO Results:
This goal directly supports equitable access and comprehensive student support by increasing stable funding for scholarships, Basic Needs initiatives, and academic programming. Diversified revenue reduces financial volatility and strengthens institutional sustainability.
Proposed Activity:
Implement donor retention benchmarks; expand asset-based gift acceptance; grow planned giving outreach; integrate CRM segmentation and reporting; execute structured annual and recurring giving campaigns.
Responsible Party:
Director of Foundation in coordination with Advancement Manager and Foundation Board.
Timeline to Completion:
FY2026–FY2028
Evaluation:
Revenue growth will be benchmarked annually and evaluated against a phased 4–6% annual increase model to ensure feasibility and fiscal responsibility.
Goal 2: Modernize and Expand Diversified Giving Capacity
Fully implement the Smart Giving Suite and Double the Donation (DTD) platforms by May 2026 to enable diversified non-cash gift processing, secure one to three planned gift commitments by FY2028, and increase employer matching gift revenue annually.
Alignment to Strategic Goal:
Institutional Effectiveness and Resource Optimization
Alignment to SAO:
Increase access to diversified gift vehicles and strengthen long-term philanthropic capacity.
Connection to Mission, Strategic Plan, and SAO Results:
Modernized gift infrastructure expands donor accessibility, increases tax-efficient giving options, and strengthens endowment development, ensuring sustainable support for equity-centered student success initiatives.
Proposed Activity:
Launch Smart Giving Suite; integrate DTD matching platform; conduct matching gift awareness campaign; initiate planned giving outreach; track non-cash and legacy commitments.
Responsible Party:
Director of Foundation with Advancement Manager oversight.
Timeline to Completion:
Platform launch by May 2026; planned gift commitments secured by FY2028.
Evaluation:
Success will be measured by increased non-cash gift transactions, documented matching gift revenue growth, and one to three confirmed planned gift commitments by FY2028.
Goal 3: Strengthen Donor Stewardship and Engagement:
Transform the annual Scholarship & Donor Celebration into a campus-centered stewardship event by FY2028, increasing donor attendance by 25% and expanding

student participation to include invited family members, strengthening donor retention and engagement.
Alignment to Strategic Goal:
Community Engagement and Student Success
Alignment to SAO:
Improve donor retention and stewardship engagement to increase sustainable philanthropic investment.
Connection to Mission, Strategic Plan, and SAO Results:
Strengthened stewardship directly supports equitable access by reinforcing donor confidence and expanding long-term investment in scholarships and student support programs.
Proposed Activity:
Expand donor invitations; increase student-family participation; incorporate program impact presentations; facilitate donor-to-program leader engagement; implement post-event follow-up strategy.
Responsible Party:
Director of Foundation and Advancement Manager.
Timeline to Completion:
Initial expansion Summer 2026; fully institutionalized by FY2028.
Evaluation:
Success will be measured by a 25% increase in donor attendance and improved post-event donor renewal rates within six months of the event.
Goal 4: Build Scalable Advancement Capacity:
Establish a Part-time Advancement Manager beginning FY2026–27 to strengthen donor retention systems, expand diversified giving, and support sustainable revenue growth.
Alignment to Strategic Goal:
Institutional Sustainability and Operational Effectiveness
Alignment to SAO:
Strengthen donor engagement systems and improve revenue stability through structured advancement operations.
Connection to Mission, Strategic Plan, and SAO Results:
Dedicated advancement capacity enhances donor stewardship, increases diversified giving, and stabilizes long-term funding for scholarships and equity-centered student services. `
Proposed Activity:
Hire Part-time Advancement Manager; implement performance benchmarks; expand retention tracking; increase non-cash and legacy outreach; formalize stewardship workflows.
Responsible Party:
Director of Foundation with annual performance review by Foundation Board.
Timeline to Completion:
Position established FY2026–27; annual performance evaluation through FY2028.
Evaluation:
Success will be measured by documented donor retention rate improvement (minimum 5% annual increase once baseline is established), increased non-cash and planned gift activity, improved stewardship timeliness, and sustained annual contributed revenue growth of 4–6% aligned with the Foundation's conservative projection model.

XIV – RESOURCE REQUESTS

Resource Request 1

1. Request Name (short title):
   Advancement Manager (20 hrs/week)
2. Request Amount:
   $50,000 max annually
3. Type of Request:
   Personnel
4. Alignment to Goal(s) in Section XIII:
   Goal 1 – Increase revenue to $500,000 by FY2028
   Goal 4 – Establish and evaluate Part-time Advancement Manager
5. Is this a one-time or ongoing expense?
   Ongoing
6. Category of Request:
   ☑ Part-time Classified Professional or Professional Expert
7. Which best describes your request?
   Personnel (Not Ranked)
8. Description / Justification (300 words max):

The Advancement Manager position is a revenue-aligned growth investment designed to implement structured donor retention strategies, expand diversified gift development, and strengthen stewardship systems. With a $350,000 revenue baseline, achieving targeted 4–6% annual growth generates approximately $14,000–$21,000 in new revenue annually, with additional upside from increased non-cash gifts, matching gift expansion, and legacy commitments. Modest retention improvements significantly increase donor lifetime value and reduce revenue volatility. The position is structured as a phased investment with measurable benchmarks including retention improvement, diversified gift volume growth, and sustained annual revenue increases. This staffing addition strengthens long-term philanthropic sustainability while supporting expanded scholarship and equity-centered student success funding.

The position will be evaluated annually to determine whether revenue growth and retention improvements justify continued investment or require strategic adjustment.

Resource Request 2

1. Request Name (short title):
   Smart Giving Suite (FreeWill)
2. Request Amount:
   $8,000 annually
3. Type of Request:
   Non-Personnel
4. Alignment to Goal(s):
   Goal 2 – Implement diversified non-cash and legacy gift processing
   Goal 1 – Revenue growth to $500,000 (stretch goal)
5. Is this a one-time or ongoing expense?
   Ongoing (Annual Subscription)
6. Category of Request:
   ☑ Non-Instructional Software
7. Which best describes your request?
   Ranked – Strategic Investment

8. Description / Justification:
The Smart Giving Suite enables processing of stock, cryptocurrency, Donor-Advised Fund (DAF), Qualified Charitable Distribution (QCD), and estate gifts. A recent $15,000 stock gift — representing over 4% of annual revenue — was delayed due to infrastructure limitations, illustrating immediate ROI potential. One additional asset-based gift offsets the annual cost. Diversified gift access increases donor capacity, strengthens endowment growth, and reduces reliance on cash-only campaigns. This system positions the Foundation for long-term sustainability and expanded scholarship funding.

Resource Request 3

1. Request Name:
   Double the Donation (DTD) Matching Gift Platform
2. Request Amount:
   $999 annually (75% discounted rate secured for three years)
3. Type of Request:
   Non-Personnel
4. Alignment to Goal(s):
   Goal 2 – Matching gift awareness and revenue expansion
   Goal 1 – Revenue growth
5. Is this a one-time or ongoing expense?
   Ongoing
6. Category of Request:
   ☑ Non-Instructional Software
7. Which best describes your request?
   Ranked – Strategic Investment
8. Description / Justification:

The DTD platform streamlines employer matching gift processing, increasing revenue without additional donor solicitation. The Foundation secured a 75% discounted rate for three years, significantly reducing financial risk. Matching gift revenue has already exceeded the annual subscription cost, demonstrating immediate cost neutrality and scalable growth potential. This platform maximizes donor impact and strengthens diversified revenue streams.

Resource Request 4

1. Request Name:
   Scholarship & Donor Celebration Enhancement
2. Request Amount:
   $10,000 annually
3. Type of Request:
   Non-Personnel
4. Alignment to Goal(s):
   Goal 3 – Transform Scholarship & Donor Celebration
5. Is this a one-time or ongoing expense?
   Ongoing (Annual Event)
6. Category of Request:
   ☑ Non-Instructional Supplies and Materials
   ☑ Professional or Contracted Services
7. Which best describes your request?
   Ranked – Strategic Investment

8. Description / Justification:

The expanded Scholarship & Donor Celebration strengthens stewardship, increases donor retention, and deepens community engagement. The goal is to increase donor attendance by 25% and expand student participation to include family members. Strong stewardship correlates directly with improved donor renewal and multiyear giving. This investment supports relationship-building and reinforces philanthropic commitment to student success.

Resource Request 5

1. Request Name:
   Professional Development – Advancement Best Practices
2. Request Amount:
   $5,000 annually
3. Type of Request:
   Non-Personnel
4. Alignment to Goal(s):
   Goals 1, 2, and 4 – Revenue growth, diversification, and operational effectiveness
5. Is this a one-time or ongoing expense?
   Ongoing
6. Category of Request:
   ☑ Professional Development
7. Which best describes your request?
   Ranked – Strategic Investment
8. Description / Justification:

Professional development ensures compliance integrity, fundraising best practices, and effective use of advancement systems. As infrastructure modernizes, training supports data integrity, donor segmentation, and strategic stewardship execution. Investment in professional competency reduces risk and strengthens long-term revenue sustainability.

Resource Request 6

1. Request Name:
   Foundation Marketing Budget
2. Request Amount:
   $15,000 annually
3. Type of Request:
   Non-Personnel
4. Alignment to Goal(s):
   Goal 1 – Revenue growth to $500,000 (stretch goal)
5. Is this a one-time or ongoing expense?
   Ongoing
6. Category of Request:
   ☑ Non-Instructional Supplies and Materials
7. Which best describes your request?
   Ranked – Strategic Investment
8. Description / Justification:

This is a new line item consolidating all Foundation marketing expenses into a dedicated budget. Previously, marketing activities were dispersed across the marketing department and president's budget. This annual allocation of $15,000 will support Foundation-specific events, donor campaigns, stewardship materials, and all other Foundation marketing

needs. Centralized marketing funding enables strategic donor communication, strengthens brand visibility, and supports revenue growth initiatives through targeted outreach and engagement activities.
Success will be measured through campaign participation rates, donor acquisition, recurring gift enrollments, and year-over-year appeal performance.

Resource Request 7

1. Request Name:
   Accounting Manager Position (20 hrs./week, Phased)
   Year 1: 10 hrs./week, Year 2: 20 hrs./week
   Pending Revenue Benchmarks
2. Request Amount:
   $50,000 max annually (when fully phased in)
3. Type of Request:
   Personnel
4. Alignment to Goal(s):
   Goal 1 – Revenue growth and financial sustainability
5. Is this a one-time or ongoing expense?
   Ongoing (Phased implementation)
6. Category of Request:
   ☑ Part-time Classified Professional or Professional Expert
7. Which best describes your request?
   Personnel (Not Ranked)
8. Description / Justification:

Accounting Manager position (20 hours per week) is needed to support the Foundation's accounting and financial operations. This position will handle gift processing, financial reconciliation, reporting, compliance documentation, and donor acknowledgment coordination. As the Foundation grows and diversifies its revenue streams, dedicated accounting support ensures accurate financial tracking, maintains audit readiness, and supports transparent stewardship reporting to donors and stakeholders. This position will be phased in gradually as operational needs and budget capacity allow, with an annual salary range of $50,000 max when fully implemented.

XV – EXECUTIVE SUMMARY

The Gavilan College Foundation is a nonprofit auxiliary organization that generates private philanthropic support for scholarships, Basic Needs initiatives, and institutional priorities aligned with the College's mission of equitable access and comprehensive student support. In FY25–26, the Foundation managed approximately $350,000 in annual contributed revenue and $1.1 million in total assets while achieving full IRS compliance and restoring regulatory good standing.

An operational review identified the need to modernize gift acceptance infrastructure. At the time, donors were limited primarily to mailing contributions, and the Foundation lacked the technological capacity to accept non-cash or electronically facilitated gifts. This limitation resulted in a delayed $15,000 stock gift from a donor intending to make an ongoing annual commitment.

For a Foundation generating $350,000 annually, a single $15,000 gift represents more than 4% of total annual revenue and underscores the importance of diversified and accessible giving vehicles. Without modernized systems, the Foundation risks lost revenue opportunities and diminished donor confidence.

FY26–27 priorities include adopting the Smart Giving Suite to enable acceptance of stock, cryptocurrency, Donor-Advised Fund (DAF) distributions, Qualified Charitable Distributions (QCDs), and Required Minimum Distribution (RMD) gifts. These enhancements, combined with strengthened stewardship and operational support, position the Foundation for responsible, phased growth while protecting institutional credibility and expanding sustainable funding for student success initiatives.

These initiatives align directly with the College's strategic priorities of institutional sustainability, equitable student access, and measurable improvement in student persistence and completion outcomes.