

Comprehensive Program Review Report



Program Review - Foundation

Program Summary

2020-2021

Prepared by: Tim Foster

What are the strengths of your area?: The COS Foundation leverages several strengths to provide benefit to the District.

1. Volunteers - The volunteer board and committee structure of the Foundation promotes connectivity between the community needs and resources and the District's capabilities and needs. Volunteers are engaged to help access the community, distribute District public information, and share the District's benefits.
2. Not-for-profit status - The COS Foundation serves as the not-for-profit organization for the District. It efficiently facilitates charitable gifts to benefit the District and allows the District to access resources (grants and others) that it would not otherwise be able to access without an active 501c3 corporation to accept the funds.
3. Specialized Staff -The COS Foundation can employ professional staff to support and further the advancement needs of the District. These dedicated staff can provide technical expertise and support services for all financial development efforts within the District such as sports and art, while also directing its own development activities to solely benefit the District at-large.
4. The Foundation assets - The assets of the Foundation are predominantly unrestricted. The investment income affords a steady stream of annual, six-figure disbursements to the District to support District objectives and advance its mission.

What improvements are needed?: While the COS Foundation has supported the District well, the opportunity to do more is significant. The primary sources of Foundation raised income each year are a result of net surpluses from special fundraising events and the investment income from Foundation invested assets. A conscious effort has been invested by volunteers or staff to gain resources from other traditional financial development efforts such as:

1. Alumni Development -Through Alumni Re-connections and Cultivation
2. Planning giving program - Developing a Planned Giving Program and Marketing Plan
3. Annual giving campaigns - Through Campaign Creation
4. Major gift development - Through Campaign Creation
5. Capital gift development - Through Campaign Creation

Much more must be done to increase the alumni and planned giving audiences to engage them as donors. The foundation current staff are limited to 2.5 FTEs. The rigorous event schedule consumes most of the resource development time available from the Foundation Director and Administrative Assistant. The 24-hour-per-week scholarship assistant's time is almost 100% devoted to scholarship administration, with only a few hours during the day of and leading up to the foundation events. Added staff, at least one FTEs, could be immediately engaging alumni and planned givers, increasing those audiences and participating in many tasks currently performed by the director at the expense of more frequent major gift and planned gift donor cultivation.

Describe any external opportunities or challenges.: philanthropic giving with the establishment and growing student attendance of the Hanford and Tulare college centers. There are many opportunities for naming gifts for the new buildings and to spur renovation and re-purposing of older ones. There also is an estimated 170,000 living COS Alumni that have not been materially engaged in any way by the District or the Foundation. This population of individuals that have directly benefited from their time at COS often have the greatest affinity for the college, yet remain disconnected and disengaged.

Challenges: The recent disruption of college operations resulting from COVID have also affected the COS Foundation. Several events have been canceled, most of which generate some net income that is used for funding scholarships or college enhancement. With these opportunities currently suspended, it is especially important that improvements in cultivating giving to the college in the five formed listed above.

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Overall SAO Achievement: SAO Develop Additional District Resources - SAO remains the primary focus for change. Most efforts can be categorized into two main categories: 1) Leveraging and perfecting existing methods of resource development (ie. fundraising events, investment income, and scholarship donations) to improve overall income to the Foundation and, therefore, support to the District and our students. 2) Initiating or expanding new resource development channels (ie. Alumni gifts, capital gifts, planned gifts, etc.)

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Investment income continues to be an important component of the Foundation's capacity to advance the district and invest in COS student success. A change in investment advisers to a local adviser promises to enhance the portfolio return and has cut adviser fees in half. The performance of the fund (and the market in general) has been erratic but generally heading in a positive direction. The Investment Committee recommended that the current spending levels for endowed scholarship funds at 4% and unrestricted funds for operating/advancement expenditures at 3% remain sustainable at this time.

SAO Direct unrestricted Foundation resources to the District based on an accountable and systematic District-wide process that directly links to District objectives - Since 2014-2015, the COS Foundation has facilitated and funded a Foundation Project Funding application process that supports projects with demonstrated alignment to District Objectives and the needs of the District. From inception through the 2020-2021 awards process, the COS Foundation has committed \$1,295,443 in project funds. More resources are needed, however, as \$1,742,766+ unsatisfied or 26% of the total value of applications submitted for this funding. Certainly, not all were worthy of funding, but there remains more need than capacity each year. Each year, though, the COS Foundation has also been able to incorporate one or more project requested through the District's above-base resource allocation process, further integrating and aligning the Foundation resources to the District needs.

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Changes Based on SAO Achievement: The COS Foundation is going to continue to refine its operations of scholarships and project funding. Most of the COS Foundation's changes will be to continue increasing resources. The Foundation staff has reached its limitation on implementing new operations and then continuing them. There will be a need to add classified staff or start discontinuing some activities for the sake of beginning and sustaining new ones. For example, the COS Foundation may need to decrease the events it hosts to increase its capacity to develop the alumni association and the planned giving program. Both have their merits. But if total resources available to support the District is the expectation, some less effective fundraising methods need to be discontinued on the expectation that others will soon surpass them with larger and more frequent gifts.

Outcome cycle evaluation: Overall the Foundation is progressing steadily in its usual operations while also becoming better

aligned with and supportive of District Objectives. For the income potential of the Foundation to be realized more channels of giving must be developed and a greater audience must be created. The Foundation is experiencing increased large donor engagement as indicated by the growth in the total number of donor gifts and the total dollar amount received through gifts of \$500 and over. Programs for annual campaigning and capital gifts have been initiated with modest success, but are providing added income streams. The Foundation now does have an alumni database of over 47,000 individuals. It is developing an engagement plan for them and has implemented an engagement plan for planned givers. Finally, the COS Foundation has a very positive reputation in the community and within the District as an active and positive force supporting COS and Student Success. COS really is the only higher education provider in the district seeking donations. The COS Foundation volunteer and staff will continue to seek out and match those with an affinity for higher education and those with an affinity for the college with the needs of the College of the Sequoias.

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What improvements are needed?: While the COS Foundation has supported the District well, the opportunity to do more is significant. The primary sources of Foundation raised income each year are a result of net surpluses from special fundraising events and the investment income from Foundation invested assets. Conscious effort has been invested by volunteers or staff to gain resources from other traditional financial development efforts such as:

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Describe any external opportunities or challenges.: Opportunities: The COS Foundation and the District have substantial opportunities for added community investment and philanthropic giving with the establishment and growing student attendance of the Hanford and Tulare college centers. There are many opportunities for naming gifts for the new buildings and to spur renovation and re-purposing of older ones. There also is an estimated 170,000 living COS Alumni that have not been materially engaged in any way by the District or the Foundation. This population of individuals that have directly benefited from their time at COS often have the greatest affinity for the college, yet remain disconnected and disengaged.

Challenges: The service area of the District contains a substantial number of charitable organizations that are capable of attracting donors that might otherwise support the COS Foundation. It will be up to the Foundation to find new philanthropists while also engaging the existing philanthropic community with a case compelling enough to attract giving. Education is second only to religion, nationally, in dollars donated to a philanthropic giving category. Locally, however, the high poverty levels tend to inspire greater giving to basic need charities, providing shelter, food, and health services. Finally, while the population of alumni is large and predominantly disengaged, the challenge to make up for lost ground is immense. The COS Foundation now has all of the names of the alumni from 1987-2019 and now has current emails and mailing addresses for approximately 40,000 of them. An engagement plan now has an audience. Developing a plan that is sustainable with the limited capacity of the current COS Foundation staff level will be a challenge. The COS Foundation board has made a material investment in reconnecting with COS

Alumni over the next three years to help overcome these challenges.

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Small, steady improvements in the net proceeds of the combined events continue to build. A recent partnership built with the Visalia Rotary Clubs and the Visalia Rotary Community Foundation Board around hosting an annual event has proven to be mutually beneficial toward supporting higher education. More outright gifts from unduplicated donors have occurred thanks to improved campaigning and event sponsorship development. There was a modest increase in the 2018-2019 in the number gifts \$500 or more (285 over 245 a difference of 40 or 16%). The total value of \$500 or more gifts was \$81,576 more than the prior year; reflecting a greater investment into the Foundation and the District from a similar group of donors.

Investment income continues to be an important component of the Foundation's capacity to advance the district and invest in COS student success. A change in investment advisers to a local adviser promises to enhance the portfolio return and has cut adviser fees in half.

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SAO Develop and administer student scholarship funds and awards - The Foundation continues to make steady improvements in all areas it can within the scholarship system. During the 2020-2021 awarding process, the Foundation facilitated 422 awards worth \$406,000; slightly fewer total awards and less than \$30,000 lower total amount of awards.

Foundation staff focus have been on:

- increasing the number off applications submitted,
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- the quality of the donor experience; particularly with COS Scholarship Night
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Despite these improvements, there is a great amount of need left unmet. Only 43% of the applications were awarded a scholarship, leaving that many students, possibly, without the means necessary to attend college. The Foundation efforts of refinements are needed, but the focus on resource development will surely infuse more resources into the COS Scholarship program. An estimated \$1.1 million could have been used to provide similar scholarship awards to the number of applicants that did not get awarded as those that did. Recent developments in the California Promise program may re-calibrate the COS Scholarship Program significantly within the next two school years; shifting private funding to more continuing and transferring scholarships.

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Related Documents:

[State of the Foundation 2019.pdf](#)

[US Giving by Cause.PNG](#)

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Action: Planned Giving Program Plan (2019-20)

Implement a Planned Giving Program Plan that will reach donor prospects, estate planners and investment advisers to promote COS as a cause to be supported to increase the frequency and size of planned gifts donated to the District.

Leave Blank:

Implementation Timeline: 2019 - 2020

Leave Blank:

Leave Blank:

Identify related course/program outcomes: District Objective 4.2 - Improve organizational effectiveness by strengthening operations of and communication between District departments, divisions, and constituents

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Person(s) Responsible (Name and Position): Tim Foster

Rationale (With supporting data): Planned giving is a key component in resource development efforts in higher education. Studies through CASE.org indicate that planned gifts offer the greatest effort/dollar outcome ratio of all resource development efforts. However these efforts can take a long time to pay off, so it is important to continue other resource development efforts for immediate needs while continuing to cultivate planned gifts. The most frequent large gifts to the COS Foundation are in the form of planned gifts. More can be done to put COS in the minds of those preparing their own estate plans or plans for others.

Priority: Medium

Safety Issue: No

External Mandate: No

Safety/Mandate Explanation:

Update on Action

Updates

Update Year: 2020 - 2021

10/13/2020

Status: Continue Action Next Year

The second planned giving, monthly eNewsletter was distributed to 463 recipients as several additional email addresses were added based on a system of individual additions for people that met age and COS connection criteria.

Impact on District Objectives/Unit Outcomes (Not Required):

Update Year: 2020 - 2021

09/08/2020

Status: Continue Action Next Year

Initiated a Planned Giving eNewsletter through our Planning Giving Marketing vendor, Crescendo. Provide 396 email addresses, 344 were delivered, 93 were opened, 10 clicked on a link. One gift of \$5,000 was attributable to this mailing.

Impact on District Objectives/Unit Outcomes (Not Required):

Link Actions to District Objectives

District Objectives: 2018-2021

District Objective 4.2 - Improve organizational effectiveness by strengthening operations of and communication between District departments, divisions, and constituents

District Objectives: 2015-2018

District Objectives - 4.1 - Improve operational systems based upon data driven decision-making as described in the COS 2.0

Program Review - Foundation

manuals.

District Objectives - 4.2 -Improve the efficiency, effectiveness and communication of human, physical, technological, and financial resources to advance the District Mission.

Action: Develop strategies to support enrollment growth in the Fresno State Visalia Campus (2019-20)

In cooperation with Fresno State, develop and implement strategies to support the increased transfer rate of COS students into the Fresno State Visalia Campus. This may include development of new financial resources and reallocation of existing Foundation resources.

Leave Blank:

Implementation Timeline: 2019 - 2020

Leave Blank:

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Identify related course/program outcomes: District Objective 2.2 - Increase the number of students who transfer to a four-year institution by 10 percent over three years

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Person(s) Responsible (Name and Position): Tim Foster, Foundation Director and the volunteer members of the Fresno State Visalia Campus Task Force

Rationale (With supporting data): To carry on with the efforts to bring a Fresno State campus to Visalia, the COS Foundation may be able to influence course enrollment through incentive strategies directed at COS students contemplating transferring to a four-year college to further studies in fields being offered at the Fresno State Visalia Campus. If by working with the Fresno State staff to learn of ways incentives could be structure, the Foundation task force can create and implement effective incentives, the Fresno State Visalia Center enrollment demand will continue to grow. Higher enrollment demand will, hopefully, result in continued increase in the Fresno State Visalia Campuses capacity to serve students locally and solidify the Fresno State presence in Visalia. As Fresno State continues its presence in the community, the COS Foundation should devise ways that local donations to the COS Foundation can also be construed as supporting Fresno State. Doing so improves the COS Foundation's ability to expand relationships with current donors into supporting four-year college students locally and could increase the overall giving to the COS Foundation that might have gone directly to Fresno State or other four-year institutions further out of the area.

Priority: High

Safety Issue: No

External Mandate: No

Safety/Mandate Explanation:

Update on Action

Updates

Update Year: 2020 - 2021

09/06/2019

Status: Continue Action Next Year

COS Foundation funded 27 Fresno State Visalia Campus ITEP students that transferred from COS with a \$1,000 scholarship. The board of directors pledged to use BrewFest proceeds to help fund the incentive program annually.

Impact on District Objectives/Unit Outcomes (Not Required):

Link Actions to District Objectives

District Objectives: 2018-2021

District Objective 2.2 - Increase the number of students who transfer to a four-year institution by 10 percent over three years

Program Review - Foundation

District Objective 4.2 - Improve organizational effectiveness by strengthening operations of and communication between District departments, divisions, and constituents

Action: Alumni Engagement Plan (2019-20)

Expand COS Alumni audience from the current 700 to 30,000+. Develop an Alumni Engagement Plan for COS Foundation Board approval and begin communicating with them to elicit support for the college and participation in college events.

Leave Blank:

Implementation Timeline: 2019 - 2020

Leave Blank:

Leave Blank:

Identify related course/program outcomes: District Objective 4.2 - Improve organizational effectiveness by strengthening operations of and communication between District departments, divisions, and constituents.

SAO - Develop Additional District Resources

Person(s) Responsible (Name and Position): Tim Foster, Foundation Director

Rationale (With supporting data): In an effort increase resource development by the Foundation, improving relationships with alumni will be key. According to Giving USA 2019 study, education is second to religion as the cause receiving the highest amount of dollars donated in the US. Of those funds, only 1.5% is donated to community colleges. In the Voluntary Support of Education study in 2017, it was reported that four-year colleges generate an average of 55.4% of all philanthropic giving from alumni, while two-year colleges average 4.5% of gifts made by alumni. That difference is one that can and should be reduced. The COS Foundation has improved its number of connections to COS Alumni through individual recruitment and self-identifying, but only by hundreds. It takes access to student directory information to make a greater number of connections and to increase the audience effectively. At the end of 2018-2019, the Foundation was granted access to the directory information of COS attendees who attended between 1987 and 2019. That database has been appended with email addresses and current mailing address.

Priority: High

Safety Issue: No

External Mandate: No

Safety/Mandate Explanation:

Resources Description

Personnel - Classified/Confidential - An additional full-time, classified staff member skilled in correspondence, event organization and overall membership engagement. (Active)

Why is this resource required for this action?: An additional classified staff member skilled in correspondence, event organization and overall membership engagement will dramatically accelerate the level of alumni engagement and the overall number of alumni being reached by engagement activities. The associated tasks to do this is not enough to justify a full-time position. By adding tasks currently performed by the COS Foundation Director and the Administrative Assistant. The Director may engage in more highly-skilled activities associated with major gift, planned gift, and capital gift cultivation. The delegated duties would include event planning and execution, website development and content maintenance, and donor database maintenance for a database that has grown 37 times larger with the addition of alumni directory information. (See attached task breakdown) It is expected that the added staff resource will quickly (within one to two years) generate greater revenue and resulting gifts to the District to far surpass the annual operating outlay requested of the District. The Return On Investment (ROI) for this position will be greater than the investment. These gifts may manifest in the form of greater project funding allocations, more scholarships, and any other resources needs the District may call upon the Foundation to help secure to benefit the District and the students directly. It is important to the structure of the COS Foundation that its personnel costs and majority of its other operating expenses continue to be underwritten by the District as opposed to such expenses being underwritten by the Foundation. Fundraising for operating costs takes on a whole new dynamic in the way of case for support and priorities of staff. Of course, staff would need to first raise their operating budget before any District priority. Foundations of California community colleges that must raise operating dollars institute schemes such as donation fees, funds held in trust fees, investment income assessments and unique fundraising efforts specifically to underwrite operations. Doing so dilutes energy spend raising resources to donate to the college and students as operating dollars must be the first dollars raised to

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sustain operations. Such factors can also diminish gifts to the college as donors learn that a portion of their donation will not go to their intended cause within the District. Avoiding these dynamics is why 4-year universities avoid such structures and generally underwrite the operations of the Foundation with the understanding that far more resources will be donated to the university than spend on these operating costs. Currently less than \$50,000 of operating expenses are being underwritten directly by the Foundation. The revenue source to cover those expenses is investment income, so that staff may avoid raising money for operations. The rest of the investment income is used for annual gifts to the District and continued growth of the unrestricted capital balance being invested.

Notes (optional): The cost estimate is strictly for personnel costs. Office space and other infrastructure are already in place in the Foundation office to accept one more staff member. Other incidental operating expenses associated with this new staff position can be covered by Foundation investment income. A possible alternative would be to first fill a half-time position at a similar hourly rate and attempt to fill the position and begin delegation of tasks. Later submitting for another base budget augmentation to convert the position to full-time. The caliber of applicant will probably not be as strong and the chances of turnover increase, but it would be a much lesser cost (approx. \$25,000) to fill for one year and would still help the Foundation increase its effectiveness to generate more community financial support to the District.

Cost of Request (Nothing will be funded over the amount listed.): 58000

Related Documents:

[Alumni Engagement Plan 2019-2020.pdf](#)

[Capital Budget for Alumni Implimentation.pdf](#)

[Foundation Org Chart Current-Future.pdf](#)

[College Alumni Giving.PNG](#)

[Foundation Staffing Levels.PNG](#)

Link Actions to District Objectives

District Objectives: 2018-2021

District Objective 4.2 - Improve organizational effectiveness by strengthening operations of and communication between District departments, divisions, and constituents

Action: Planned Giving Program Plan (2020-2021)

Expand the Planned Giving Program Plan to reach more donor prospects, estate planners, and investment advisers to promote COS as a cause to be supported to increase the frequency and size of planned gifts donated to the District.

Leave Blank:

Implementation Timeline: 2020 - 2021

Leave Blank:

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Identify related course/program outcomes: District Objective 4.2 - Improve organizational effectiveness by strengthening operations of and communication between District departments, divisions, and constituents

SAO Develop Additional District Resources - SAO remains the primary of focus for change. Most efforts can be categorized into two main categories: 1) Leveraging and perfecting existing methods of resource development (ie. fundraising events, investment income and scholarship donations) to improve overall income to the Foundation and, therefor, support to the District and our students. 2) Initiating or expanding new resource development channels (ie. Alumni gifts, capital gifts, planned gifts, etc.)

Person(s) Responsible (Name and Position): Tim Foster

Rationale (With supporting data): Planned giving is a key component in resource development efforts in higher education. Studies through CASE.org indicate that planned gifts offer the greatest effort/dollar outcome ratio of all resource development efforts. However these efforts can take a long time to pay off, so it is important to continue other resource development efforts for immediate needs while continuing to cultivate planned gifts. The most frequent large gifts to the COS Foundation are in the form of planned gifts. More can be done to put COS in the minds of those preparing their own estate plans or plans for others.

Priority: Medium

Safety Issue: No

External Mandate: No

Safety/Mandate Explanation:

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Link Actions to District Objectives

District Objectives: 2018-2021

District Objective 4.2 - Improve organizational effectiveness by strengthening operations of and communication between District departments, divisions, and constituents

Action: COS Alumni Engagement Initial Year (2020-2021)

Initiate and perpetuate a COS alumni engagement plan, including branding, recruitment, engagement, and campaigning systems that may be properly sustained over time.

Leave Blank:

Implementation Timeline: 2020 - 2021

Leave Blank:

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Identify related course/program outcomes:

Person(s) Responsible (Name and Position): Tim Foster, Foundation Director

Rationale (With supporting data): Effective higher education resource development benefits from a functioning alumni engagement program. The COS Foundation lacks such a program now, but is in the initial development phase with a contracted marketing firm, Interact Communications. There are approximately 140,000 alumni of the College of the Sequoias. The College of the Sequoias supplied the COS Foundation with a digital database of directory information available from all students that attended COS Between the years of 1986-2018. From these records, the COS Foundation has been able to acquire 37,000 emails and 47,000 current mailing addresses of alumni. This new source of contact information will be enhanced annually with additional student directory information.

The value of interacting with this large group of alumni prompted the COS Foundation board to invest in a three-year capital budget to develop and implement a COS Alumni Association brand, alumni engagement strategy with a marketing firm experienced in two-year college campaigns.

Priority: High

Safety Issue: No

External Mandate: No

Safety/Mandate Explanation:

Action: Develop strategies to support enrollment growth in the Fresno State Visalia Campus (2020-2021)

In cooperation with Fresno State, develop and implement strategies to support the increased transfer rate of COS students into the Fresno State Visalia Campus. This may include the development of new financial resources and reallocation of existing Foundation resources.

Leave Blank:

Implementation Timeline: 2020 - 2021

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Identify related course/program outcomes: District Objective 2.2 - Increase the number of students who transfer to a four-year institution by 10 percent over three years

SAO Develop Additional District Resources - SAO remains the primary of focus for change. Most efforts can be categorized into two main categories: 1) Leveraging and perfecting existing methods of resource development (ie. fundraising events, investment income and scholarship donations) to improve overall income to the Foundation and, therefor, support to the District and our students. 2) Initiating or expanding new resource development channels (ie. Alumni gifts, capital gifts, planned gifts, etc.)

Person(s) Responsible (Name and Position): Tim Foster, Foundation Director and the volunteer members of the Fresno State Visalia Campus Task Force

Rationale (With supporting data): To carry on with the efforts to bring a Fresno State campus to Visalia, the COS Foundation may be able to influence course enrollment through incentive strategies directed at COS students contemplating transferring to a four-year college to further studies in fields being offered at the Fresno State Visalia Campus. By working with the Fresno State

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staff to learn of ways incentives could be structured, the Foundation task force can create and implement effective incentives, the Fresno State Visalia Center enrollment demand will continue to grow. Higher enrollment demand will, hopefully, result in the continued increase in the Fresno State Visalia Campuses capacity to serve students locally and solidify the Fresno State presence in Visalia. As Fresno State continues its presence in the community, the COS Foundation should devise ways that local donations to the COS Foundation can also be construed as supporting Fresno State. Doing so improves the COS Foundation's ability to expand relationships with current donors into supporting four-year college students locally and could increase the overall giving to the COS Foundation that might have gone directly to Fresno State or other four-year institutions further out of the area.

Priority: High

Safety Issue: No

External Mandate: No

Safety/Mandate Explanation:

Link Actions to District Objectives

District Objectives: 2018-2021
District Objective 2.2 - Increase the number of students who transfer to a four-year institution by 10 percent over three years
District Objective 4.2 - Improve organizational effectiveness by strengthening operations of and communication between District departments, divisions, and constituents