



**San Bernardino Valley College Foundation**

# **2026 - 2031 Strategic Plan**

**Includes Campaign Plan  
December 2025**

Approved by Board on 11.12.25

## **Executive Summary**

The San Bernardino Valley College Foundation (SBVC Foundation) developed this 2026–2031 strategic plan to chart a bold path forward in alignment with the College’s mission, vision, and community needs. This plan outlines measurable goals and strategic priorities designed to deepen the Foundation’s philanthropic impact, enhance its internal capacity, and expand its reach throughout the Inland Empire. Key focus areas include launching a transformative \$10 million Centennial Campaign, increasing the endowment to \$15 million, strengthening alumni engagement, advancing student equity and access, and modernizing Foundation operations.

Grounded in partnership with campus leadership and shaped by board and staff input, this strategy serves as both a call to action and a roadmap for sustainable growth. It positions the Foundation to meet the moment—celebrating a century of SBVC's impact while laying the foundation for the next.

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## **About the Foundation**

The SBVC Foundation is an independent nonprofit organization dedicated to raising philanthropic support for San Bernardino Valley College, a vital institution serving the Inland Empire. The Foundation was established to help ensure that students have access to scholarships, high-quality academic programs, and life-

changing opportunities. As SBVC approaches its 100th anniversary in 2026, the Foundation is poised to build on a legacy of support with forward-looking strategies to meet emerging needs.

In 2024, the Foundation was staffed by an Executive Director, a Development Coordinator, an Administrative Assistant, and a part-time student worker. During 2024–2025, three additional positions were added, supported by a multi-year grant funding two Development Coordinators and one Assistant Director through 2027. *A core strategic priority is to generate sufficient internal revenue and/or College support to sustain these roles beyond the life of the grant.*

Additionally, the Foundation has committed to increasing its endowment from \$6.7 million to \$15 million —marking a defining milestone in its pursuit of long-term financial sustainability and deeper student impact.

## **Assessment**

A general assessment of the Foundation's operations, potential, and strategic direction was conducted to inform the development of this strategic plan. This process included:

- A Foundation Board Survey in April 2025, which also included responses from Foundation staff. The Board includes the President of San Bernardino Valley College and the Vice President of Administrative Services. (See Appendix for survey instrument and results.)
- Insights from the Foundation's fundraising consultant (2022–2024), Erin Phillips of Gonser Gerber, whose written assessment is included in the Appendix.

- Input and strategic guidance from Lisa Wright, CFRE, of Green Parakeet Consulting, who has served as the Foundation's strategic and fundraising consultant since January 2025. Her key insights are below.
  1. *Staffing and Infrastructure: The Foundation has historically operated with lean staffing and limited infrastructure. While the addition of three new positions in 2024/2025 expanded capacity, the current structure is only sustainable in the short term. New revenue and/or continued College/District support will be essential to maintain and grow staffing beyond 2027.*
  2. *Scholarship and Grant-Making Operations: These programs are well-managed and demonstrate strong alignment with student needs. However, efficiency and scalability could be improved with enhanced software systems and streamlined administrative processes.*
  3. *Branding and Marketing: There are substantial opportunities to increase visibility and strengthen the Foundation's brand identity, particularly in communicating its value to the region. The hiring of a Development Coordinator focused on marketing in 2024–2025 has significantly advanced this work.*
  4. *Alumni Relations: Alumni engagement can be meaningfully enhanced through a more visible and structured Alumni Association. The hiring of a Development Coordinator and Assistant Director in 2024–2025 has created a foundation for more strategic alumni outreach, membership growth, and benefits programming.*

5. *Board Development: Opportunities exist to expand the Board's community representation and to deepen member involvement in fundraising and advocacy for the Foundation.*
6. *Fundraising Potential: The Foundation has strong potential for growth across all giving areas—including major gifts, annual giving, planned giving, and corporate partnerships. A more formalized infrastructure, prospect development process, and segmented donor strategy will be key to unlocking this growth.*

*These findings directly informed the strategic priorities outlined in the following section.*

### **Strategic Planning Process**

A Strategic Planning Committee of the Foundation Board convened several times throughout 2024 and 2025 to help guide the direction of this plan. The Committee played a key role in shaping the revised mission, vision, and institutional goals. The full Board of Directors formally approved these elements at its May 2025 meeting. Input from this Committee directly informed the strategic priorities and framework presented in this document. The final plan was approved by the Board on November 12, 2025. The next step for the Strategic Planning Committee is to meet in February and decide on the metrics/reports they would like to prioritize in 2026.

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## **Mission**

To inspire philanthropy that empowers students and advances the college's legacy of excellence, innovation, and opportunity.

## **Vision**

A future where every student in the Inland Empire has access to an exceptional education and limitless career opportunities.

## **Commitment Statement**

We will strengthen alumni connections, steward resources, cultivate lasting partnerships with businesses, community organizations and individual donors, and ensure the continued success and accessibility of the college for generations to come.

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## **Strategic Framework Aligned to Board-Approved Goals**

The following strategies and goals are organized under three board-approved institutional priorities:

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### **1. Increase Net Assets to \$15M**

Grow and diversify fundraising to build long-term financial sustainability and reach the Foundation's endowment goal.

## Strategies and Goals:

- Grow and diversify contributed revenue through:
  - A revitalized annual giving program with segmented campaigns, recurring monthly donors, and peer-to-peer initiatives like *Valley College Champions*
  - A stepped leadership giving program to move donors toward and through President's Circle levels
  - An expanded major gifts pipeline
  - A planned giving program that increases both realized and unrealized legacy gifts
  - A corporate partnership strategy (launched by FY2026)
  - Launch at least one earned income initiative (e.g., athletics food vendor revenue share) by FY2029
- Invest in integrated CRM (Customer Relationship Management) systems for alumni and donor engagement (by FY2027)
- Develop a formal prospect research and management system by FY2026, including qualification criteria and data tracking
- Automate the intake of donor contributions wherever feasible to streamline operations and donor stewardship
- Standardize foundation-wide policies for operations, finance, and donor engagement
- Grow the Foundation's endowment from \$6.7M to \$15M by 2030 by implementing strategies previously listed under growth of revenue.
- Secure sustainable college support, revenue and/or endowment income to support grant-funded positions

- Generate sufficient revenue to support additional key positions within the next five years to potentially include an Assistant Director of Operations and Stewardship, a Grant Writer, and a Corporate Development Coordinator

## **2. Securing \$500,000 Annually for Student Support Programs**

Maintain and grow support for student-focused initiatives, ensuring sustainable funding aligned with the College's core priorities.

### **Strategies and Goals:**

- Maintain existing scholarship funding of at least \$500,000+ annually to meet student needs and increase student retention.
- Continue aligning scholarship fundraising with high-need student groups (e.g., first-generation students, working adults)
- Identify and support under resourced academic programs that directly impact student success
- Establish partnerships with SBVC's institutional research teams to track impact and ensure alignment with equity and student success goals
- Modernize the scholarship award process to improve efficiency, transparency, and access
- Ensure that at least 99% of student scholarship recipients receive funds via online BankMobile accounts to promote ease of access and financial inclusion
- Collect at least 15 student and donor stories annually and build a Foundation story bank to communicate impact and inspire giving
- Collect 15-20 employer stories annually showcasing our alumni and their

employers (mostly through social media).

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### **3. Enhancing Community Awareness**

Deepen alumni and community engagement, improve visibility, and position the Foundation as a trusted partner and valued community presence.

#### **Strategies and Goals:**

- Increase Alumni Association membership from 5,500 to 10,000 by FY2031
- Modernize alumni engagement benefits and launch regional outreach with President/Executive Director travel
- Incorporate alumni engagement into campus events
- Establish at least three new community or business partnerships annually
- Increase social media followers and engagement metrics across all major platforms by 10% year over year - consistent growth
- Maintain and regularly update the Foundation's website, ensuring content is current, accessible, and aligned with campaign and engagement strategies
- Collaborate with the College's Departments, when appropriate, to ensure the Foundation has a presence at College-hosted community events.
- Host at least 10 campus tours annually to introduce prospective donors and partners to the college environment
- Attend at least 50 external community events annually to raise awareness and visibility of the Foundation.
- Conduct a board self-assessment and implement a new recruitment/onboarding plan by FY2026

## **Plan Details**

The Strategic Workplan is included with this document.

## **Acknowledgments**

The San Bernardino Valley College Foundation would like to thank the members of the Strategic Planning Committee for their leadership and contributions throughout the development of this plan. Their work in 2024 and 2025 helped shape the Foundation's new mission, vision, and goals—formally adopted by the Board in May 2025—and provided thoughtful guidance that underpins the strategies outlined in this document. The plan was fully adopted by the Board on November 12, 2025.

## Campaign Plan

Centennial Campaign Plan: *"100 Years, Limitless Futures"* (tbd - holding name)

The San Bernardino Valley College Foundation will launch a \$10 million Centennial Campaign in 2026 to honor the College's 100th anniversary and lay the groundwork for its next century of service and impact. This campaign is the largest and most comprehensive fundraising initiative in the Foundation's history and will provide long-term, sustainable resources to expand student access, support academic innovation, and grow the Foundation's internal capacity.

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### **Campaign Priorities**

The Centennial Campaign will focus on building a robust set of endowed funds to ensure long-term financial stability and high-impact giving:

- \$4 million + – Scholarship Endowments  
Build a sustainable scholarship pipeline that increases access and equity for SBVC students.
- \$2 million – Endowed Fund for Direct Student Support  
Create a flexible, long-term funding source for student success initiatives, including basic needs programs such as food security, emergency aid, transportation, and housing support.
- \$TBD Amount – Endowed Fund for Athletics  
Support ongoing Athletics Department needs including equipment, uniforms, travel, and student-athlete development.

- \$2 million + – Endowed Fund for Academic Innovation & Capital Needs  
Fund future-focused academic priorities and recurring capital needs in partnership with campus leadership. Specific investment areas to be identified.

### **Planned Giving Strategy: Securing the Future Beyond the Campaign**

In addition to the \$10 million Centennial Campaign goal, the Foundation will pursue a bold planned giving strategy to strengthen SBVC Foundation's long-term financial sustainability. Over the next 24 months, we aim to secure **\$4 million in documented—but unrealized—planned gifts**, such as bequests, beneficiary designations, and charitable trusts. These legacy commitments will not count toward the \$10 million campaign total but will be tracked separately and celebrated as part of our broader vision for enduring impact. The Foundation will continue to engage a planned giving consultant, host targeted informational events, and work closely with potential campaign donors to help them explore legacy giving opportunities that align with their values and capacity.

### **What Counts Toward the Campaign Goal**

The Centennial Campaign will be structured as a **comprehensive campaign**, meaning that all philanthropic gifts and commitments received between January 2025 and the campaign's close in 2031 will count toward the \$10 million goal. This includes gifts to the campaign's four primary funding priorities, as well as other contributions made to the SBVC Foundation—such as designated program support, scholarship donations outside the endowment, and unrestricted gifts. While the campaign will focus donor engagement around strategic priorities, this comprehensive approach allows the Foundation to honor the full spectrum of donor generosity and demonstrate the collective impact of giving during this

transformational period. Note: As is a standard business practice in campaigns, we may later decide to count unrealized planned gifts if the donor is at least 70 years old by 2031.

## Combined Gift Range Chart

### Realized Gifts Toward \$10M Goal + Separate Planned Gift Commitments

| Gift Level  | # Realized<br>Gifts Needed | Total Realized | Planned<br>Gifts<br>(Targeted<br>Commitments) | Estimated<br>Value |
|-------------|----------------------------|----------------|-----------------------------------------------|--------------------|
| \$1,000,000 | 3                          | \$3,000,000    | 1-2                                           | \$1,500,000        |
| \$500,000   | 3                          | \$1,500,000    | 1-2                                           | \$1,000,000        |
| \$250,000   | 4                          | \$1,000,000    | 2-3                                           | \$750,000          |
| \$100,000   | 10                         | \$1,000,000    | 3-4                                           | \$500,000          |
| \$50,000    | 12                         | \$600,000      | 3-5                                           | \$250,000          |
| \$25,000    | 15                         | \$375,000      | —                                             | —                  |
| \$10,000    | 40                         | \$400,000      | —                                             | —                  |
| \$5,000     | 40                         | \$200,000      | —                                             | —                  |
| \$2,500     | 80                         | \$200,000      | —                                             | —                  |
| \$1,000     | 200                        | \$200,000      | —                                             | —                  |

|               |             |                         |              |                     |
|---------------|-------------|-------------------------|--------------|---------------------|
| \$500-\$999   | 400-500     | \$250,000-\$300,000     | —            | —                   |
| <\$500        | 1,000-1,500 | \$1,225,000-\$1,275,000 | —            | —                   |
| <b>Totals</b> | —           | <b>\$10,000,000</b>     | <b>10-15</b> | <b>\$4M pledges</b> |

### Centennial Campaign Phases and Milestones

| Phase                           | Timing              | Key Activities & Milestones                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|---------------------------------|---------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Foundation Phase (Pre-Campaign) | Jan 2023 – Dec 2025 | <ul style="list-style-type: none"> <li>- Lead gift secured for 3 new staff positions</li> <li>- Consultants engaged (Gonser Gerber, Fundraising Consultant, Planned Giving Consultant)</li> <li>- Campaign readiness and feasibility planning completed</li> <li>- Draft Case for Support developed</li> <li>- Annual giving program launched</li> <li>- Major donor cultivation initiated</li> <li>- Donor materials designed</li> <li>- Social media ramp-up and website redesign</li> <li>- Alumni Association reinvigorated</li> <li>- Strategic Planning Committee convened</li> </ul> |

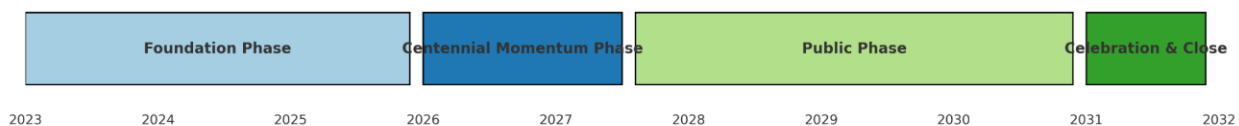
- Internal infrastructure (CRM, policies) strengthened

Centennial  
Momentum  
Phase

Jan 2026 – Mid 2027  
*(Public launch in  
2027/2028,  
dependent on 50%  
raised)*

- Continue leadership giving and major donor cultivation
- Finalize Case for Support and donor materials
- Engage potential campaign donors through segmentation
- Continue CRM and storytelling infrastructure
- Train staff, board, and volunteers
- Recruit Campaign Committee
- Soft Launch at March 2026 Gala — unveil campaign vision and share early commitments, including the Tribe's lead gift *(not counted toward \$10M goal)*
- Prepare for broader campaign rollout

|                     |                  |                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Public Phase        | 2027/2028 – 2030 | <ul style="list-style-type: none"> <li>- Launch public campaign with full community engagement</li> <li>- Digital marketing, events, and alumni outreach</li> <li>- Continued cultivation of major gifts and peer-to-peer support</li> <li>- Activation of business and community partnerships</li> <li>- Ongoing campaign updates and milestone recognition</li> </ul> |
| Celebration & Close | 2030 – 2031      | <ul style="list-style-type: none"> <li>- Final gift push and campaign wrap-up</li> <li>- Public celebration of campaign success</li> <li>- Donor recognition and long-term stewardship planning</li> <li>- Transition to permanent endowment strategy</li> </ul>                                                                                                        |



## Donor Recognition Plan

A thoughtful donor recognition strategy will be implemented to celebrate and steward campaign supporters, with attention to both public visibility and personal appreciation.

#### Recognition Tiers Will Include:

- Named Giving Opportunities for major gifts, including scholarships, programs, and facilities (to be developed with campus leadership)
- Campaign Honor Roll published in annual reports, on the website, and in the Foundation's centennial materials
- Donor Spotlights across digital platforms and at campaign events
- Invitation-Only Donor Events for major contributors and campaign committee members
- Legacy Circle Recognition for donors who commit planned gifts

The Foundation will ensure all recognition aligns with donor preferences, offering options for anonymous or collective acknowledgments.

#### Communications & Marketing Plan

An integrated communications strategy will support all phases of the campaign—from early engagement to public momentum and final celebration.

#### Key Elements Will Include:

- **Campaign Branding:** A unifying visual identity, logo, and tagline (e.g., “100 Years, Limitless Futures”)

- **Campaign Microsite or Web Hub:** Featuring giving portal, donor stories, campaign goals, and progress updates
- **Video Storytelling:** Highlighting student success, alumni impact, and donor voices
- **Social Media Strategy:** Coordinated posts, campaign hashtags, and digital mini-campaigns around Giving Tuesday, alumni appeals, and milestone events
- **Print & Digital Materials:** Case for Support, donor packets, pledge forms, and board toolkits
- **Event Integration:** Coordinated messaging and branded materials at campaign-related events, including the Centennial Gala and regional alumni gatherings

Messaging will evolve throughout the campaign to reflect its current phase and inspire action among key audiences including alumni, major donors, business leaders, and first-time supporters.

### **Campaign Committee Structure**

The Campaign Committee is the core volunteer leadership body of the Centennial Campaign. Members are chosen for their passion for San Bernardino Valley College, visibility within the community, and ability to influence giving—whether through their own leadership gifts or their networks. Two Campaign Committee Co-Chairs will lead this group, alongside the Foundation’s Executive Director.

Primary Roles of Campaign Committee Members:

- Ambassadors – Represent the campaign in the community, enthusiastically sharing the campaign vision with peers, colleagues, and fellow alumni.
- Gift-Makers – Commit to a personal leadership-level gift early in the campaign to model generosity and set the pace for others.
- Connectors – Open doors to potential campaign donors and community partners by leveraging personal and professional relationships.

#### Committee Composition:

The committee will include:

- Current SBVC Foundation board members
- Prominent alumni and alumni association leaders
- Key donors or donor family representatives
- Community leaders and business executives
- Philanthropic champions who align with SBVC's mission

#### Staff Support & Infrastructure:

- Campaign staff will provide orientation, tailored training, and materials (e.g., talking points, campaign case, donor packets).
- Committee members will be invited to regular briefings and milestone meetings to stay informed, motivated, and involved.

- Foundation staff will also assist in scheduling meetings, supporting cultivation activities, and tracking follow-up.

This committee is not expected to solicit gifts unless they are comfortable doing so. Rather, members are empowered to help advance relationships and visibility, working in partnership with staff.

### **Fostering an Internal Culture of Philanthropy**

The Centennial Campaign will serve not only as a fundraising initiative but also as a catalyst for deepening a campus-wide culture of philanthropy.

#### **Internal engagement strategies will include:**

- **Regular Campaign Briefings** for college leadership, department chairs, and key staff to ensure alignment with campaign messaging and milestones
- **Involvement in Donor Experiences** such as campus tours, events, and impact storytelling to reinforce the role of faculty and staff in stewarding support
- **Cross-Functional Collaboration** between the Foundation and College departments (e.g., Marketing, Institutional Research, Student Services) to track and demonstrate campaign impact
- **Recognition and Storytelling** that highlights how student success is made possible through donor generosity

By building shared ownership of fundraising outcomes, the campaign will help cultivate lasting internal support for philanthropic growth—well beyond the campaign period.

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## Campaign Key Success Metrics

The Centennial Campaign will be measured not only by its fundraising total but by the quality and sustainability of the donor relationships it builds. To ensure accountability and momentum, the Foundation will track and report on the following indicators:

### Fundraising & Financial Benchmarks:

- Total Revenue Raised toward the \$10 million goal, segmented by priority fund
- Number of Leadership Gifts Secured, including multi-year pledges and named funds
- New Endowment Commitments: total count and value

### Engagement Benchmarks:

- Board and Campaign Committee Participation Rate – percentage of members making a gift and engaging in donor identification or outreach
- Number of Potential Campaign Donors Actively Engaged, including meeting attendance, cultivation events, or exploratory conversations
- Donor Retention and Upgrade Rate – year-over-year growth from annual donors who increase their giving or convert to multi-year supporters

### Visibility & Reach Benchmarks:

- Alumni Engagement Growth, including increases in updated contact information, active alumni donors, and event participation
- Campaign Website and Social Media Metrics, including engagement, click-throughs, shares, and donor conversion rates

These metrics will be reviewed quarterly by campaign staff and the Executive Director, and summarized in periodic reports to the Campaign Committee and Foundation Board.

### **Campaign Reporting & Evaluation**

Regular, transparent reporting will keep campaign leadership, the Foundation Board, and key stakeholders informed, aligned, and engaged throughout the life of the Centennial Campaign.

#### **Reporting Framework:**

- **Quarterly Campaign Dashboards**  
Provide a snapshot of financial progress, donor engagement, and participation metrics. Dashboards will be shared with campaign staff, the Executive Director, and the Campaign Committee.
- **Board Updates**  
Progress toward campaign goals will be included in Foundation Board meeting packets at least twice annually, with more frequent updates during public launch and closeout phases.
- **Campaign Committee Briefings**  
Held every 4–6 months to maintain shared ownership and adjust strategy based on donor activity, gift pipeline trends, and overall campaign pacing.
- **Milestone Communications**  
Special updates will be issued following key milestones—such as the Centennial Gala soft launch, reaching 50%, and crossing the final campaign

threshold.

In addition to fundraising totals, reporting will highlight growth in donor engagement, leadership giving, planned giving commitments, and campaign visibility

### **Commitment to Ethical Fundraising Practices**

The Foundation is committed to the highest standards of integrity, transparency, and professionalism throughout the Centennial Campaign. All fundraising efforts will adhere to nationally recognized principles and ethical guidelines.

**Our approach will be guided by:**

- The **Association of Fundraising Professionals (AFP) Code of Ethical Standards**
- The **Donor Bill of Rights**, ensuring transparency, respect, and accountability in all donor interactions
- A **Gift Acceptance Policy** that outlines the types of gifts the Foundation will accept, how they are reviewed, and how they will be recognized and stewarded
- Documentation and **reporting standards** that align with nonprofit best practices and donor intent

All campaign-related staff, volunteers, and consultants will be expected to uphold these principles, helping to build long-term donor trust and institutional credibility.

## **Risk Assessment & Contingency Planning**

The Foundation has proactively identified potential risks that could impact the success or timeline of the Centennial Campaign and developed contingency strategies to maintain momentum and credibility.

### **Identified Risks and Mitigation Strategies:**

- **Delayed Public Launch**

If the campaign has not reached 50% of its goal by mid-2027, the full public launch may be deferred to 2028. In this scenario, donor engagement will continue behind the scenes, focusing on quiet-phase commitments and relationship-building.

- **Leadership Gift Shortfall**

If a top anticipated gift is delayed or withdrawn, the Foundation will activate a secondary pool of major donor prospects and encourage multi-year pledges from mid-level donors to help stabilize momentum.

- **Staff Turnover**

Key campaign functions are documented in shared systems, and all campaign-related donor data is housed in the Foundation's CRM. Consultants and senior staff will ensure continuity if staffing changes occur during the campaign period.

- **Economic Uncertainty or Donor Fatigue**

The campaign will offer multiple giving options—including recurring monthly gifts and planned giving—to accommodate varying donor

capacities. Messaging will be adjusted to reflect broader economic conditions without weakening the case for support.

This risk management approach will be reviewed periodically by campaign leadership to adjust for evolving circumstances.

### **Post-Campaign Stewardship & Transition Plan**

The close of the Centennial Campaign will mark the beginning of a new era of donor stewardship, long-term relationship-building, and strategic alignment with the Foundation's ongoing fundraising goals.

#### **Key Post-Campaign Strategies:**

- **Comprehensive Final Report**

A professionally designed campaign closeout report will be distributed to donors, highlighting total funds raised, campaign priorities funded, and real stories of student and community impact.

- **Multi-Year Recognition**

Donors will be celebrated at a public event, featured in Foundation communications, and recognized according to their giving tier—whether through named funds, permanent listings, or personalized appreciation.

- **Endowment Stewardship**

Endowed fund donors will receive annual impact reports detailing investment growth, fund usage, and ongoing impact. Where possible,

students supported by these funds will share testimonials.

- **Continued Engagement Pathways**

Campaign donors will be invited to remain involved through:

- Foundation events and campus experiences
- Annual giving programs
- Alumni initiatives
- Planned giving and Legacy Circle opportunities

- **Internal Transition**

As the campaign closes, staff will shift into sustaining engagement systems and long-term donor relationship plans, including prospect development for the next major initiative or campaign cycle.

This strategy ensures the momentum and goodwill generated during the Centennial Campaign will carry forward—fueling the Foundation's future success.