

Sample: Educational Planning Committee Report
Academic Year 2020-2021
Year 2 of the 2019-2022 Strategic Plan
Year 2 of the 2019-2025 Educational Master Plan

EMP Focus Area and Goal: *College Systems Goal 1*
Champions: *Vice President of Administrative Services*
Presenters: *Greg Nelson*

[CS Goal 1 Implementation Plan with action steps](#)

EMP 6-Year Goal and Strategic Plan 3-Year Objectives:

EMP CS Goal 1: The fiscal integrity and wellbeing of the District is maintained in a manner that is prudent, responsive, sustainable, and transparent.

Strategic Plan Objective CS1.1: Reserve is maintained in accordance with BP/AP 6251.

Strategic Plan Objective CS1.2: Adequately maintain the District's credit/bond ratings with Standard and Poor's and Moody's associated with all bond types – Revenue, Lease Revenue, General Obligation, Certificate of Participation, and others.

Strategic Plan Objective CS1.3: Expand institutional grant-writing capacity to increase external funding and resources to strengthen institutional programs, facilities, and services in support of College programs and services.

Action steps discussion for CS Goal 1 from 11/16/2021

Reserve increases have been met, cautiously optimistic regarding fiscal picture but the COVID19 is causing a lot of businesses to fold which will have an impact on taxes collected by the county and state. AAA Bond rating has been maintained.

COVID-19 has highlighted the “digital divide” in many ways and funds have been set aside to purchase laptops and hotspots for students and staff. This is also something that needs to be considered regarding the new Bolinas lab. If we cannot get fiber there then it presents major challenges for teaching and learning.

COVID-19 has had a significant impact on staff and their families, not just students. District employees, contractors, and other areas of the workforce have all been impacted by COVID-19.

Information on grant writing, provided as summary by Keith Rosenthal 5/1/2021:

Action Step 3:1 – The primary focus of grant writing has been helping to find funding sources that are tied to building a more equitable community. Efforts were spent around the Umoja Equity Institute and mental health services. While corporations and foundations were applying large sums of money to organizations during the start of the BLM movement, very little went to NGOs that were outside of their current funding sphere.

Action Step 3:2 – Increasing grant writing capacity with internal or external constituents is certainly a goal as this is key to securing larger dollars which can have a substantial impact on programs or services. Writing the

proposal is one-third of the equation. Two-thirds of the process is identifying potential grantors that are open to a Letter of Inquiry (LOI) and/or are adding new projects to their portfolio. The prospect research is extremely time-consuming. There are companies such as Foundation Center who can help identify prospects through basic search criteria for \$600 per year. Time would still need to be spent vetting through the prospects to determine alignment between the project the foundation's goals. According to national averages, one needs to submit 9 to 10 applications to receive one funding source and the success rate of securing new funders is between 30-40%. The challenge is determining if this is a good return on investment when there is limited time and resources. There has been some work completed in securing funds from government grants which offer on an average \$400,000 per grant. For those seeking government grants the average time to write the proposal is 80-200 hours. Reporting requirements add a layer of challenges to these grants. There has been success in securing funds from donors with family foundations. Funds can be direct from a family member and the time from submission to acquisition of funds is greatly reduced. The Advancement Office will continue to investigate the most cost-effective and efficient way to access funds through grant writing.

Action Step 3:3 – Procedures for grant submittal have been established through the use of the Advancement Office's constituent relationship management system. This new system was implemented in Feb. 2021 and it helps create workflows as the grant moves from prospect research to submission. It also helps with the implementation as it can send alerts with reports and renewal applications are due.

EPC Discussion / Feedback 11/16/2021

Key Discussion Area:

- Connecting fiscal to equity/anti-racism work. The district has set aside an "Equity Fund" to help fund basic needs of students and various other equity minded activities. The budget touches every aspect of the institution. All PRAC presentations, policies and requests are intended to be equity minded and the budget will support those efforts to the extent that funds are available. The District does not have a current college-wide system to ensure equity minded decision making for budget development outside of PRAC. It could help move the needle further with regard to equity if PRAC's framework for making decisions through an equity lens were applied to all aspects of the budget.

Key Discussion Area: Fees, Billing, Parking, Collection of Money from Students

- Alina asked about how the district might consider reviewing policies around such fiscal items that can impact students as: when tuition and fees are due, charging for parking, not citing students in the first 2-3 weeks of the semester, and considering not billing dual enrollment students for tuition and considering it part of our enrollment strategy. Greg reviewed history on several of these topics, noted that COM doesn't cite for parking in the first two weeks and does not put students into collections for any debt under \$25, and said that they should review all of these policies again and consider possible changes.

Key Discussion Area: Grant Writing

- Should college consider having a grant writer or, if not have a position for grant writing, should have a person designated as a grant coordinator so everyone on campus knows what others are doing. In the past, this role was in the job description of PRIE leadership. There are many grant writing opportunities that we qualify for but we either may not apply or we may have multiple applications on campus, which may disqualify the institution. The Advancement Office may play a role, but it is not likely the primary place for the role to live for the entire campus.

Progress Indicators

Progress Indicator CS1.1: Multi-year projection of the District's financial obligations in both the tentative and adopted budgets reflects the increased reserve amounts as approved by the Board of Trustees in Board Policy and Administrative Procedure 6251.

Value for 20/21:

Progress Indicator CS1.2: Through effective financial planning and rating meetings, Standard and Poor's and Moody's will provide letter to show the credit worthiness of the District for potential investors.

Value for 20/21:

Progress Indicator CS1.3: Priorities for additional funding and support are established. Options for increasing internal and external grant writing are established.

Value for 20/21:

Rating of Progress

Please self-rate your progress toward achieving each of the above objectives:

- Red: No progress
- Yellow: Substantial progress
- Green: All action steps implemented, and objective achieved

Strategic Plan Objective CS1.1:

Strategic Plan Objective CS1.2:

Strategic Plan Objective CS1.3:

Where are you not on track? What will you do differently for next year / what else needs to happen?

Performance Indicator Data for EMP 6-Year Goals

CS Goal 1 Performance Indicator: Reserve will be at 12% and bond rating maintained.

| Baseline/ Target | Year 1 19/20 | Year 2 20/21 | Year 3 21/22 | Year 4 22/23 | Year 5 23/24 | Year 6 24/25 |
|---------------------|-----------------|---------------------------------------|-----------------|-----------------|-----------------|-----------------|
| 12% | 9.5% | PRAC Presentation | | | | |

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