

Barton Community College Strategic Plan Project Charter

Purpose (The why of the project/current state):

Barton Community College will strengthen donor engagement and stewardship by formalizing and executing a tiered, evidence-based stewardship pathway that couples the Foundation's Donor Relations Policy with the College's community engagement efforts (e.g., participation with Service Clubs, Economic Development Board, Booster Club, and other Cougar Den and donor events). Today, stewardship practices are partially standardized and include the mapping of event touchpoints for scalability. By aligning recognition, reporting, and relationship-building activities with defined donor tiers and purposeful presidential/community outreach, Barton will increase donor satisfaction, renewals, upgrades, and advocacy in support of institutional priorities.

Artifacts: (The evidence being used):

- Donor Relations Policy (cultivation, solicitation, acknowledgment, recognition, and reporting).
- Historical giving and pledge data by donor, fund type, and amount (renewal, upgrade/downgrade, and lapse rates).
- College-hosted event participation and engagement logs (e.g., holiday social invite/attendance, service-org interactions, campus events).
- Communication touchpoint records (thank-you timelines, receipts, impact/endowment/scholarship reports, newsletters).
- Constituent feedback (post-event surveys, donor interviews/notes) and advancement operations metrics (turnaround time for receipts and acknowledgements).
- Baseline recognition/reporting compliance against policy requirements by tier.

Overview (Summary of what will be done):

The project will operationalize the Donor Relations Policy and intentionally weave the President's community engagement activities into annual stewardship plans. The project will:

- validate and finalize the policy;
- build tiered stewardship standard operating procedures that define required/suggested/optional touchpoints by gift level and fund type;

- implement a cross-functional communication flow (Foundation, President's Office, Athletics) to execute acknowledgments, recognition, reporting, and event invitations on time; and
- measure outcomes (renewal, upgrade, participation, satisfaction) to iterate each cycle.

Project Addresses Strategic Initiative:

5.2 – Increase donor engagement and stewardship to support college goals and priorities.

Goal (Desired result/the data point you want to move):

- Establish baseline renewal rate leveraging Raiser's Edge by FY2027.
- Increase upgrade rate (donors who give at a higher level YoY) by +1 percentage point by FY2028.
- Achieve ≥95% on-time completion of required acknowledgments and reports by donor tier each fiscal year.
- Grow average event participation among targeted donor tiers by +5% by FY2027 (e.g., holiday social, dedications).
- Document satisfaction/relationship health indicators ≥80% following presidential or service-organization touchpoints.
- Establish the baseline number of annual donor and alumni events by the end of FY2027.
- Establish touchpoint mapping for donor type, gift level, or fund designation by the end of FY2028.

Project Description or Scope of Work:

1. Finalize the Donor Relations Policy: confirm required/suggested/optional touchpoints by fund type (e.g., scholarship endowment, enhancement endowment, mixed use, annually funded scholarship) and gift/pledge tiers (e.g., \$250k, \$50k, \$10k, \$2.5k, \$1k). The Policy defines required/suggested/optional actions by donor tier and fund type; touchpoint mapping applies those rules to specific donor segments and named donors, built out progressively through FY2028.

2. Map President's community engagement to donor strategy: Define criteria for donor inclusion at presidential/community events and align pre-/post-event follow-ups (thank-yous, call notes, invitations).
3. Build annual tiered stewardship standard operating procedures: Acknowledgment timelines (tax receipt, thank-you letters), recognition (board, leadership, students), reporting (impact/endowment/scholarship), and event cadence (auctions, scholarship events, dedications).
4. Operationalize execution: Create operating rhythm across Foundation, President's Office, and Athletics.
5. Data and measurement: Establish baseline metrics (renewal, upgrade, event participation, timeliness compliance) and implement semiannual monitoring and review with President's Staff.
6. Continuous improvement: Create after-action reviews for key events and reporting cycles; refine standard operating procedures annually.

Starting Date:
Spring 2026

Milestone Dates:

- Fall 2026 (Planning Complete): Validate baseline data; finalize Donor Relations Policy; draft tiered standard operating procedures; confirm event alignment with President's Office and service-org calendar. Baseline will be set using FY2024–FY2026 data extracted at the end of Fall 2026.
- Fall 2026 (Operational Launch): Launch operating rhythm; implement acknowledgment/recognition timelines; prepare Winter communications and invite lists.
- FY 2027: Execute first full cycle (holiday social planning; scholarship/dedication event alignment); track participation; monitor on-time compliance.
- End of FY 2027: Review cycle results; present metrics to President's Staff; adjust standard operating procedures.
- FY 2027–2028: Semiannual monitoring aligned with President's Staff evidence review cycle; targeted cultivation using President's community touchpoints.
- End of FY2028: Summative review of renewal/upgrade outcomes, participation, and satisfaction; set targets for FY2029.

Impact (How the goal is reflected in a defined population):

Major, mid-level, and annual fund donors receive timely, tier-appropriate acknowledgments, recognition, reports, and invitations that demonstrate the impact of their giving and strengthening affinity. Clear alignment between donor level and presidential/community engagement increases relationship depth, driving higher renewal and upgrade rates, and broadening participation in campus initiatives that advance Barton's mission.

RACI (Responsible, Accountable, Consulted, Informed) Chart:

- [See RACI Chart Spreadsheet](#)

Plan for Sustainability (Where will project "live" after implementation):

The Barton Community College Foundation and President's Office co-own the stewardship program. The Foundation manages day-to-day stewardship execution and data tracking; the President's Office manages presidential/community touchpoints and strategic donor assignments. By embedding practices into annual advancement planning, presidential scheduling, and stewardship calendars, integration is achieved. Institutional Effectiveness supports metric definitions, dashboards, and semiannual reviews with President's Staff. Tiered SOP's and event alignments are reviewed annually post-fiscal year close. Results and adjustments are incorporated into the next cycle and Board ENDS monitoring as appropriate.

Additional Relevant Information:

Identified Institutional Values: (For 5.2 SPI, what institutional values are demonstrated by this initiative? (Honesty, Fairness, Respect, Courage, Trust, Responsibility)

Fairness, Respect, Courage, and Trust