



Strategic Plan
2023-2027

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MISSION AND VISION

Mission Statement:

The Chatfield Edge empowers and accompanies students as they transform their lives through the pursuit of postsecondary education. Our work is rooted in the educational legacy of the Ursuline Sisters of Brown County, and we welcome people of all faiths or no faith backgrounds.

Vision Statement:

The Chatfield Edge envisions a world in which first-generation and underserved students are equipped with resources to reach their education and life goals, increasing their employability, and deepening their impact on their families and communities.

CORE VALUES

The Chatfield Edge infuses the following values into its work with individuals and the community:

1. **Nurturing the whole person** while respecting the uniqueness of each individual.
2. **Fostering collaboration** with an attitude of openness, optimism, and flexibility.
3. **Forming servant leaders** who reach out to the community.
4. **Living Gospel values** and encouraging faith development.

GOALS AND OBJECTIVES

The goal of The Chatfield Edge is to provide support to first-generation and non-traditional students as they gain success in life through education. The Chatfield Edge combines student support services, scholarships, and mentoring to empower individuals to achieve their life goals. We also encourage individuals to reach outside of themselves to serve others by providing servant-leader guidance.

Goals for Fiscal Years 1-3 (July 1, 2024 – June 30, 2027)

Goal	Objective(s)
1. To ensure that we reduce financial barriers for students who fit The Chatfield Edge's criteria and seek higher education or employment skills training in rural Southwest Ohio and Greater Cincinnati (a/k/a service delivery area).	<ul style="list-style-type: none">• Provide scholarship support annually to those who need it. Scholarship money identified in the Operating Budget will be provided through the allocation of our annual endowment spend of 4.5% and additional fundraising efforts.
2. Ensure that all individuals who fit The Chatfield Edge's criteria and seek postsecondary education or employment skills training in our service delivery area are supported on their journey with counselors and mentors .	<ul style="list-style-type: none">• Provide a counselor on a 1:15-20 ratio of counselor-to-students to provide support for course selection/field of study and financial aid.• Provide mentors on a 1:1 ratio of mentor-to-students for progress check-ins by a volunteer or staff member (ideally face-to-face) four times a semester.

<p>3. Create hiring (or volunteer) plans and timeline for long-term positions.</p>	<ul style="list-style-type: none"> • Coordinator for mentors/volunteers. • Accountant to run the business office. • Administrative assistant (accept deliveries, answer phones, schedule appointments, etc.).
<p>4. Long-term funding goal.</p>	<ul style="list-style-type: none"> • FY 25-Raise \$800,000 to support operations and scholarships. • FY 26-Raise \$900,000 to support operations and scholarships. • FY 27-Raise \$1,100,000 to support operations and scholarships.
<p>5. Implement formal metrics to measure success factors.</p>	<ul style="list-style-type: none"> • Determine the measures of success (e.g., financial support, annual persistence rates, graduation rates, ratios of support to scholar, etc.). See page 12. • Identify tools needed. • Implement metrics measuring.

PROGRAM DELIVERY

The Chatfield Edge envisions a world in which first generation and underserved students are equipped with resources to reach their postsecondary education and life goals, increasing their employability, allowing them to thrive and deepening their impact in their communities.

We achieve our mission through four pillars. Education Endeavors, Chatfield Scholars, Future Now and Servant Leaders.

Education Endeavors lead students through the process of finding and applying for their college, university, or trade certification program of choice. This pillar will take the student from interest, career, and school exploration through application to an institution, applying for Financial Aid, orientation and preparing for their program of study. We stay connected with our students and follow through on their needs, so they are more than prepared to enter their chosen career path and join their preferred workforce.

Chatfield Scholars represents the dozens of scholarships that are available to bridge the gap of funding that many loan programs and other funding mechanisms for postsecondary education lack. Once a student completes their FAFSA and receives a Financial Aid award letter, scholars will complete a Chatfield endowed scholarship application. Chatfield scholarships are in the category of close-the-gap funding. Indirect aid for incidental expenses may also be considered, including transportation, dorm room set-up kit, and fees for securing documents (i.e., a parent's death certificate, a copy of a birth certificate, and school application fees).

Some short term and certificate programs are not eligible for federal financial aid and the Chatfield scholarship could provide funding for the entire program.

Before receiving financial aid, students will:

- Participate in the Education Endeavors intake process.
- Work with a staff member to determine educational path and explore financial aid options.
- Been accepted at a post-secondary institution.
- Complete scholarship application.
- Completed FAFSA and explored other financial aid options (institutional, federal, private) and have identified a financial gap.
- Receive notification of available aid.
- Sign an addendum to agreement signed during the Education Endeavors intake process outlining expectations related to the use of financial aid received from The Chatfield Edge.
- Be assigned a mentor and agree to enter mentoring relationship, meeting 4 times a semester.
- Agree to participate in the spring scholarship dinner fundraiser and write a 'thank you' note to donor(s).

Future Now pairs our scholars with knowledgeable mentors to walk beside them during their education experience. Mentors are paired with a scholar once they have begun their program. Our mentors are successful professionals who can provide the support and insight needed to help our scholars succeed, thrive, and even go beyond what they themselves imagine.

Once a student is accepted into a postsecondary program, a mentor commits to meeting with the individual one-on-one at key milestones to:

- Ascertain if the student is attending classes and completing assignments through conversations with the student and notify counselor/director of programs if there are issues or barriers preventing this.
- Listen to the student's concerns about coursework or other educational issues.
- Discuss how the student is navigating the financial implications of education attainment (this could uncover unexpected economic challenges that need to be addressed).
- Listen to the student for any new obstacles that could jeopardize their program completion and connect with additional support where possible (new transportation or daycare needs, for example).
- Encourage the student and praise them for their efforts thus far.

Key check-in milestone meetings (up to an hour) include:

- Before the start of the semester/term.
- By the end of Add/Drop period.
- Mid-term.
- End of each semester or program.

Servant Leaders opportunities invite individuals to acknowledge the blessings and gifts they have received and the importance of giving back to one's community in gratitude. The Chatfield Edge provides essential resources to students, including mentoring and financial support. Participation in community service opportunities allows the entire Chatfield Edge community to give back to others. Options include volunteering for events sponsored by The Chatfield Edge or its partners, participating in service at one's learning institution, or serving one's family or local community. Spiritual and personal growth opportunities will be offered through optional reception of daily words of affirmation or through opportunities offered on campus. As students approach graduation, conversations with mentors can also take place to discuss how the individual can begin to give of themselves to their community. Individuals making an impact on their community with humility exemplifies the servant leader.

SERVICES TO BE DELIVERED

Applicants will be initially screened via online form submission and/or phone call. If applicant is determined to be a good fit, The Chatfield Edge will provide guidance and ongoing support for the following education-related tasks and milestones:

- Choosing a career focus or field of study.
- Exploring educational opportunities.
- Completing applications for admittance into institutions/programs.
- Supporting financial aid applications.
- Close the gap financial aid/ financial program support.
- Individual mentoring.
- Service opportunities.
- Personal growth.

Audience

- High school senior students seeking postsecondary education
- Adults who live within these Ohio counties: Adams, Brown, Butler, Clermont, Clinton, Hamilton, Highland, and Warren seeking postsecondary education.

Projected Scholars:

FY 25_Year 1 – July 2024– 30 scholars (*)

FY 26_Year 2 – July 2025 – 50 scholars (*)

FY 27_Year 3 – July 2026- 75 scholars (*)

(*) This number takes into account students graduating from the program in previous years .

Projected Mentors:

FY 25_Year 1 – July 2024 – 22 mentors (^)

FY 26_Year 2 – July 2025 – 35 mentors (^)

FY 27_Year 3 – July 2026 - 50 mentors (^)

(^) This factors in the assumption of a percentage of students completing short term certificate programs and therefore decreasing the overall number of mentors needed.

Resources Needed

Personnel (paid and volunteer)

- Director of Programs – Oversees students in the Education Endeavors pillar, facilitate mentors and mentor training, coordinates scholarship disbursement with secondary institutions, oversees programming of all pillars.
- Coordinator (to begin Year 3) – Coordinate mentors, volunteers, service opportunities, and assist with scholar intake work.
- Mentors (volunteer) – for supporting students with regular check-ins (ideally face-to-face) and tracking the student's continued eligibility for a Chatfield scholarship.
- IT Support (contractor) – to provide computer access for exploring educational opportunities and completing applications if the individual does not have access. Ongoing computer access will be the individual's responsibility, possibly with assistance from Chatfield scholarships, if needed.

Partners

- Programs such as GED centers, adult education institutions, vocational and career training programs.
- List of admissions counselors at local educational institutions, including contact information for direct connections.
- Local parishes and churches for volunteer and mentor pipelines as well as scholar promotion.

Other Resources

- Counselor Training Manual.
- Assessment tools for choosing a field of study, such as Ohio Means Jobs or [Future Plans](#) (collaboration with G.R.I.T.).
- Facilities – Meeting rooms for mentor/student interactions – St. Martin campus, YMCA, local churches, public libraries, etc.

Budget Expenditure Considerations

FY 25:

Expenses:

Staffing – Director of Programs.

Scholarships.

Emergency Grant funding – Document retrieval, books, dorm supplies, etc.

Events – Scholarship Brunch, Mentor Training, Mentor/Mentee kick-off.

FY 26 & 27:

Expenses:

- Staffing – Director of Programs, Coordinator.
- Scholarships.
- Emergency Grant funding – Document retrieval, books, dorm supplies, etc.
- Events – Scholarship Brunch, Mentor Training, Mentor/Mentee kick-off.

DEVELOPMENT

Development Initiatives

To provide scholarships, support operations, and grow the Endowment, The Chatfield Edge will engage in the following initiatives:

- **Direct Mail Appeals** serve as critical touchpoints with donors throughout the year.
- **Events** offer opportunities to share the mission and vision with donors, the Ursulines, and the community while engaging sponsors to support the events.
- **Grants** from foundations and government entities provide critical funding to support programs.
- **Donor cultivation** includes stewarding current donors and prospecting for new ones.
- **Planned-Giving** enables donors to leave an intentional legacy of support.
- **Endowment** growth will sustain the organization into the future. The target allocation for endowment growth will range from 5.6% to 7.1% of the annual fundraising goal.
- **Facilities Rental** allows the Chatfield campus to provide an earned revenue source.
- **Scholarship fundraising dinner** - The annual Chatfield Scholars fundraising dinner will bring students, their families, staff, mentors, donors, and community partners together to celebrate student success and raise funds necessary to provide future scholarships.
- **Online Giving** represents an inexpensive and targeted way to connect with interested individuals and create a roadmap to giving through campaigns like Giving Tuesday, Cincinnati Gives and others.
- **Creating a social media pipeline to give** will grow our future base of support.

Audience

The Chatfield Edge strives to carry the donor base from the former Chatfield College into the mission and vision of the new non-profit organization. These donors include Chatfield College alums, staff, parents, individuals, philanthropists, foundations, and corporations from Greater Cincinnati and rural southwest Ohio. To build upon this foundation, The Chatfield Edge will cultivate relationships with new individual donors and introduce the organization to new foundations and corporations.

Timeline of delivery

July 2024 – June 2025 (FY 25)

Fundraising Goal – \$800,000

Starting in July of 2024, we will focus on our Top 50 donors to make about 25% of this goal. The remaining will come from Foundations (30%), Direct Mail (20%), Board Giving (10%), Events (10%), and Prospect Mail & Online Giving at 5%. During this second full year, we foresee transitioning to a more robust CRM that will allow us to implement email and reporting automations to save time for higher priority advancement opportunities. We also will bring on board a development intern as opportunity permits.

July 2025 – June 2026 (FY 26)

Fundraising Goal – \$900,000

Our fundraising will continue as it did in year FY25, but our emphasis will be on expanding our advancement capabilities with staff and using the B2B model of Connector, Closer and Cultivator. This will allow us to really begin adding high-capacity prospect meetings, foundation research capabilities, added social media donor pipelines and a fully realized legacy plan.

July 2026 – June 2027 FY(27)

Fundraising Goal – \$1,100,000

In reviewing identified competitors, the average revenue budget for those located in Ohio was \$2.5 million. This is reachable as we expand our development capabilities and build a pipeline of new funders. We will also need to do a better job of researching high-capacity funders both existing and prospective, as well as structuring asks around these stretch and transformational asks.

By FY 2029, our 3 biggest sources of income should be our Top 50 donors who are giving transformational gifts (25%), Board (20%), Foundations (20%), Direct Mail (20%), Events (10%), Prospects and Online (5%)

Resources needed

The Chatfield Edge currently has one full-time staff member working as its development director. This individual is responsible for carrying out all aspects of development.

Employees/Contractors: Moving forward, the organization will likely need to hire 1-2 additional employees or contractors to assist with grant writing, events, and administration.

- Interim:
 - a. Contract with a grant writer.
 - b. Volunteer committees to assist with events and other development initiatives.
- FY 25:
 - a. Hire an assistant event coordinator on contract Hire a part-time or hybrid administrative assistant.
 - b. Continue to contract with a grant researcher and writer.
 - c. *Recruit an intern and/or launch an internship program.*
- FY 26 and 27:
 - a. Hire 3 fundraising staff in the B2B model. Connector, Closer & Cultivator.

Volunteers: Besides paid staff, The Chatfield Edge's development efforts will need to rely on a strong volunteer base people to support events and outreach to donors. Contracted assistance or volunteers will be needed to spearhead efforts in the interim.

Partnerships: Solid partnerships with individuals, foundations, corporations, and community organizations will provide revenue and volunteers. The Development Director, Executive Director, and the Board of Directors will work together to establish strong partnerships to support The Chatfield Edge.

TACTICS

Marketing Plan

The marketing plan should put fundamental building blocks in place to focus on the following:

- Website
- Email communications
- Social Media
- Public Relations
- Collateral
- Student Success Stories
- Event support

Website :

- Short Term: Invest in photography. This can also be used in social media, print collateral and advertising. Hire a photographer and conduct a photo shoot with your current scholars, mentors, and staff. If necessary, hire models who look like the students you wish to serve.
- Long Term: Secure funds to develop a new website with better functionality that will engage students, volunteers, partners, donors, and grant funders.

Email Communications:

- When more specific content needs to be communicated to target groups, send separate emails through Constant Contact
- Create an annual content calendar.

Social Media:

- Instagram: If the target audience is young people, enhance Instagram strategy, otherwise keep functionality relevant.
- LinkedIn: Consider providing board members with template messages for this platform to increase followers.
- Consider how to leverage each social media channel to increase donations.
- Develop an annual calendar that can be used as a guideline for monthly social posts (connecting to major holidays, annual observance days that relate to the mission (e.g., apprenticeship month, education-related observances, mentoring, volunteering)).

Blogs:

- Continue to tell the stories of students and mentors and use them in newsletters, website, and on all social media channels.
- Add donor stories to inspire others to give.
- Consider using video to tell some of these stories.
- If staff or volunteers have capacity and desire, have them take on the writing. Staff can do heavy editing and publishing.

In addition to the marketing efforts outlined above, below are additional tactics targeted directly to attract potential students.

1. Referral Marketing

○ **School counselors:**

- Focus on existing list of school counselors who can refer graduating students (who fit the ideal client profile) to The Chatfield Edge. Create an introductory piece about The Chatfield Edge that can either be emailed or mailed to counselor list. Package may include: one-sheeter about The Chatfield Edge, individual sheets on 4 pillars, contact/referral number and email address, plus a student testimonial (if possible).

○ **Partner organizations:**

- Working directly with leadership at organizations like the YMCA, send introductory package, similar to above, that invites the organization to learn more about The Chatfield Edge and how to refer potential students.

2. Public Marketing

○ **Posters in community centers:**

- Near the end of the May 2024 semester, begin promoting The Chatfield Edge's services in community locations, with split messaging of: "*Graduating from high school and not sure where to go from here? The Chatfield Edge can help.*" AND "*Looking to change your life through education? The Chatfield Edge can help.*"

○ **Public advertising:**

- If budget allows, we recommend paid advertising in community publications within the deal target area (see PR section for recommendation within The Brown County Press, for example) or in outdoor/transit advertising in target communities

○ **Digital advertising:**

If budget allows, begin digital advertising for FY26. This would target Internet users in a specified region who are searching relevant terms such as "*help with college applications,*" "*how to apply for college,*" "*what to do after graduation*" (exact keywords can be determined at a later date).

Public Relations

The Chatfield Edge has an opportunity to promote its services to the general public to garner more support from donors and volunteer mentors. Write 4 press-releases that could result in 4-6 media stories per year. Include noteworthy donations/grants received, new hires/board appointments, and student achievements.

MEASUREMENT

Strategic performance measurements will track The Chatfield Edge's progress toward its stated goals.

Student Tracking Criteria

In addition to standard contact information (name, address, phone number, email, etc.), we will capture the following information throughout the process for future reporting and measurement:

- Gender
- Age
- Ethnicity
- Household income level
- First-generation student?
- Have any previous postsecondary education attempts?
- Have been involved in the court system?
- Date they joined The Chatfield Edge.

Mentor Tracking Criteria

- Online logbook for mentoring sessions – The mentor logs the date of the meeting, the student's name, and what was discussed.
- Ensure check-in meetings are taking place, especially for Chatfield Scholars.
- Information will be initially tracked through SharePoint.

Close-the-gap Scholarship Tracking Criteria

- # of scholarships provided.
- \$ amount of scholarships provided.
- Avg. value of each scholarship award.
- Was a student who received a scholarship pursuing a 2-, 4-year, or trade/certificate program?
- Did the student receiving the scholarship graduate?
- Track budget line item for money between categories such as Tuition Assistance/Childcare/Transportation, etc.
- Track scholarships/aid not provided due to insufficient funding (our funding gap).

Program Success Measurement Criteria

- # of students served.
- % of students we serve pursuing a 4-year degree, 2-year degree, or trade/certificate program.
- % of students we serve who complete college or their trade/certificate program
- % of students we serve who receive close-the-gap funding through the Chatfield Scholars program
- # of mentor volunteers and # of hours.
- # of mentor interactions with students we serve.

Quality of Life Measurements

Surveys done on our scholars in the future may help provide us with other success criteria for the program.

- # and % of our scholars who pursued advanced degrees.
- # and % of our scholars who are involved in civic and/or philanthropic activities.
- # of hours of civic/philanthropic activities.
- # and % of our graduates who found Chatfield Edge helpful in completing their education.

BUDGET

The Chatfield Edge - Operating Budget			
	24 / '25 Budget Projection	25 / '26 Budget Projection	26 / '27 Budget Projection
Expenditures			
Program Services	40%	45%	48%
Wages & Benefits-Student Support	107,944	138,342	195,259
Scholarships and Other Support	97,527	147,527	197,527
Marketing & Advertising	74,954	78,702	82,637
Travel & Lodging	1,204	1,265	1,328
Meals & Entertainment	169	178	186
Volunteer Engagement Activities	-	-	-
Professional Services-Payroll	2,597	2,727	2,864
IT Technical Support	7,684	8,069	8,472
Internet Access	2,005	2,105	2,211
Equipment Rental	3,817	4,008	4,209
	\$ 297,902	\$ 382,922	\$ 494,693
Campus/Land Stewardship	8%	6%	5%
Contract Maintenance	6,859	1,050	1,103
Building and Grounds Projects	1,412		
Telephone	2,963	2,520	2,646
Vehicle Maintenance Expense	205		
Utilities	10,476	15,120	15,876
Repairs & Maintenance	5,415	-	-
Property Taxes	283	788	827
Supplies - Cleaning	329	630	662
Waste Removal	462	630	662
Water & Sewage	1,484	315	331
Grounds Maintenance (cemetery)	2,294	2,835	2,977
Equipment < \$500	178		
St. Martin Debt Service or Rent	7,500	9,000	9,450
Professional Services-Payroll	2,597	2,727	2,864
IT Technical Support	7,684	8,069	8,472
Internet Access	2,005	2,105	2,211
Equipment Rental	3,817	4,008	4,209
	\$ 55,962	\$ 49,797	\$ 52,288
Administrative	29%	25%	22%
Wages & Benefits-Administration	126,617	132,949	139,595
Professional Services	43,723	45,909	48,202
IT Services & Support	9,890	10,382	10,902
Internet Access	2,006	2,107	2,210
Employee Recruitment	1,284	1,348	1,416
Dues & Memberships	3,679	3,863	4,056
Licenses & Fees	8,218	8,629	9,061
Equipment Rental	3,818	4,009	4,207
Bank	1,940	2,037	2,139
Office Supplies	1,660	1,743	1,830
Periodicals	42	44	46
Staff Development	248	260	273
Miscellaneous	383	402	423
Insurance	13,814	1,260	1,323
	\$ 217,323	\$ 214,943	\$ 225,684
Fundraising	23%	24%	25%
Wages & Benefits-Fundraising	126,446	155,268	208,032
Software License Fees	7,632	8,014	8,415
Credit Card Fees	1,388	1,458	1,530
Postage	5,315	5,581	5,860
Printing	14,579	15,308	16,074
Professional Services-Payroll	2,597	2,727	2,864
IT Technical Support	7,684	8,069	8,472
Internet Access	2,005	2,105	2,211
Equipment Rental	3,817	4,008	4,209
	\$ 171,464	\$ 202,538	\$ 257,666
Total Operating Budget Projection	\$ 742,651	\$ 850,199	\$ 1,030,332