

Administrative Services Program Review 2018/19 (Comprehensive)

Office of Resource Development

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General Information (Administrative Services Program Review 2018/19 (Comprehensive))

2018/19 Administrative Services Program Review

Program Review Data and Resources

Submission Information (REQUIRED)

- Name of Lead Writer: Krista Stellmacher
- Name of Liaison: Monica Romero
- Name of Manager/Service Area Supervisor: Pamela Luster

Faculty/staff (REQUIRED)

- Number of Full-Time Classified Professionals: 1
- Number of Part-Time Classified Professionals: 0
- Number of NANCEs: 1
- Number of Students: 0

Service Area Mission (REQUIRED)

The service mission of the Office of Resource Development has been updated. The former service mission was: The Office of Resource Development changes lives through engaging the culture of the college and the community. The updated service mission is stated below.

The Office of Resource Development exists to support the students and mission of San Diego Mesa College by connecting the community to opportunities to make philanthropic investments. The Office supports the efforts of the San Diego Mesa College Foundation and campus in telling Mesa's story, creating engagement opportunities, garnering support, administering funds, stewarding donors, and sharing the impact of philanthropic investments.

This is in direct support of Mesa's mission; including the outcomes of access, which the Office of Resource Development supports through scholarships to students who may otherwise be unable to afford college; success, which the Office supports through both scholarships and funding for programmatic activities aimed to bolster curricula; and equity, as many of the resources garnered by the Office are disbursed based off need, and therefore targeted to those students who face unique barriers.

Service Area Overview (REQUIRED)

Form: 2018/19 Comprehensive Program Review Administrative Services Program Overview Section (See appendix)

Form: "2018/19 Comprehensive Program Review Administrative Services Program Overview Section"

Created with : Taskstream

Participating Area: Office of Resource Development

(REQUIRED) Service Area Name

Resource Development

(REQUIRED) Service Area Strengths

Discuss strengths of the service area.

Over the past few years, the Office of Resource Development has put into place a solid infrastructure to support growth. Strengths of the department include:

Support from Leadership – The Director of Resource Development reports directly to the college President, who is strong in the area of relationship development and the principles of fundraising. President Luster is supportive of the development program, which is a key indicator in developing a successful fundraising program, as outlined in the Compass Point report “Underdeveloped: A National Study of Challenges Facing Nonprofit Fundraising”

Stabilized and Growing Team – The Office of Resource Development made a giant leap forward in 2014 with the hire of a full-time director, Anne Zacovic. Happily, the Office has now moved past a majority of the staff turnover and onboarding that began in 2016 with the Ms. Zacovic’s retirement through 2018 as the new Director, Krista Stellmacher, familiarized herself with and further developed the RD Office’s policies and practices. With institutional knowledge and continuity of staff now regained, the RD Office is additionally strengthened through the addition of a NANCE and full-time Admin Tech. This increased staff capacity is expected to dramatically impact the department’s activities and yield higher results. Full time operational support (entering and managing data, handling correspondence, and helping to manage the scholarship and innovation grants cycles) will free up the Director’s time for building out and implementing a fundraising plan.

Growing Board – After many years of a focus on infrastructure development (bylaws, policies and procedures) and stewardship of funds, San Diego Mesa College Foundation Board has made what the Board President deemed a “Quantum Leap” towards becoming a fundraising Board. With annual goals focused on telling the Foundation’s story and garnering support, as well as bringing new and diverse talent to the membership, the volunteer group will be focused on growth and revenue. A total of five new Board members joined in the latter half of 2018, one of whom immediately brought over \$16,000 to the Mesa Promise Match Campaign—22% of the total raised. An Honorary Board structure has been proposed, offering the potential to further increase the social capital of the Foundation.

Facilities and Tools – The Office of Resource Development is well-equipped with the physical needs to run a successful program, including office space and equipment, a conference room, and software tools to manage work items. In 2018, the department migrated to Donor Perfect, a donor and gift tracking database that comes along with Constant Contact, a contact management system. These tools will allow us to better understand our donors, communicate with donors, and evaluate the success of the program to make programmatic adjustments where needed.

Relevance on Campus – With the introduction of Innovation Grants (formerly called “Mini-Grants”) to the Mesa campus in 2015, the Office of Resource Development and Mesa College Foundation increased relevancy on campus. The success of the Mesa Promise Campaign in August and September of 2018 further increased the campus’s understanding of and engagement with the Foundation. A total of 52 campus employees made a donation to the Foundation for the first time in this campaign. With this increased visibility and support, the RD Office may increase collaboration with the hundreds of individuals who are closest to Mesa’s mission.

Elements of a Culture of Philanthropy – Closely related to the relevance of the RD Office on Mesa’s campus is the presence of what can be called the “seeds of a culture of philanthropy.” A “Culture of Philanthropy” represents a best practice wherein all teams across an organization, not just the development team, understand and support the fundraising efforts/program. This state of being, evidenced in a number of indicators outlined in the Compass Point report “Underdeveloped,” is correlated with strong fundraising outcomes. The rationale is simple and self-evident: multiple teams with many contributors can achieve far more than a single team of select individuals can achieve. At Mesa College, many departments and faculty have led grassroots fundraising efforts. This is a significant strength as the RD Office seeks to increase central support and bolster the activities of these various groups.

(REQUIRED) Service Area Challenges

Discuss challenges to the service area.

Challenges that the Office of Resource Development must overcome include:

Alumni Engagement Capacity Constraints – The Office of Resource Development has identified significant untapped opportunity in engagement with alumni. While on the one hand alumni represent a prospective donor base that can be engaged through similar activity as any prospective donor base; on the other hand, the strategies for optimized engagement are unique and all communications would need to be tailored to this group. The RD Office has maximized productivity with the current scope of work, and building out an alumni program would represent a significant change to the scope of work. This could be handled through a) increasing the resources/capacity, b) re-prioritizing the current workload, or c) making incremental progress by incorporating an alumni outreach component into existing efforts.

Varied Stakeholder Understanding and Involvement – As noted above in the strengths section, various departments and schools at Mesa have undertaken grassroots fundraising efforts. While this is a strength as it can be built out into a broader network of support for campus resource development, there exists on the other hand the challenge of providing central support to such disparate and varied groups. No two groups are alike in their familiarity for or comfort with fundraising, and the previous approaches have varied greatly. Within a shared governance structure, buy-in and consensus-building is paramount to collaboration, and so offering central support to various stakeholders requires a nuanced and individualized approach until more groups have a shared understanding of how to best leverage the RD Office in support of goals. The RD team is still **exceptionally** lean and challenged to scale efforts across such a large and diverse stakeholder group.

Clear Roles in Relationship Management – Related to varied stakeholder understanding and involvement in fundraising efforts, there exists an ambiguity around shared relationship management. Some individuals on campus, through their own passion and energy, take it upon themselves to create and maintain partnerships; but there is not a consistent or shared concept of broader relationship management such that external contacts can be seamlessly and easily “handed off” to subject matter experts. This limits the follow up and consistent touchpoints with prospects and donors to what can be handled by a select few individuals.

Dearth of Current/Historical Donors and Partners – Because fundraising has historically played a very small role in the activities of Mesa College (this is consistent with Community Colleges across the state and nation), the pool of past donors is limited. There are few major donors and close friends of the college who could be called upon to make a transformational gift when needed.

Donor Experience Constraints – Very high level donors are often giving to other groups and educational institutions who may have robust fundraising teams with dozens or hundreds of individuals. These large programs are able to provide an exceptional experience for donors. The RD Office is challenged to deliver the same caliber of external customer service with a lean team.

(REQUIRED) External Influences

Discuss external influences (Collegewide and beyond).

State Funding Decisions – Governor Elect Gavin Newsom’s campaign promised to extend the California Promise to cover the first two years of college for full-time, first-time students. This presents opportunity to students and may also necessitate a shift in the types of support that we seek, as donors identify that tuition is covered for many students. While student need will remain, fundraising programs must calibrate to focus on gaps left after tuition is covered for select students. The District-wide San Diego Promise, which the San

Diego Mesa College Foundation supported in 2018, may be impacted should the California Promise be expanded as indicated.

District-Wide Fundraising Efforts – The San Diego Promise campaign presents opportunity as the District begins to engage the community in a dialogue about students' need. Should the District pursue a bond in the coming years, a focused outreach initiative will likewise present the chance to further illuminate Mesa's mission and impact.

Funding Model – Recent and future changes to the funding model for Community Colleges may impact every aspect of the campus, including the Office of Resource Development. It is too early to anticipate what the impact may be.

Campus Morale – With current faculty and classified professionals constituting the majority of the Foundation's donors and also the group most vested in the RD Office's success, the morale of the team may influence the support the office receives. Currently, morale appears quite high.

Performance of Markets – Stock markets have dived down in recent months, and many predict a continued recession. Poor market performance may decrease individual contributions to charity and additionally impacts the Foundation as endowment earnings may decrease in line with overall market performance.

Tax Reform – At the end of 2017, a tax reform bill was passed that dramatically increased the cap for standard deductions, meaning that many households (especially middle-income) may no longer be incentivized by tax write-offs to make charitable contributions.

“Competitors” – While all “competitors” for philanthropic dollars are also potential partners in the area of mission-driven work (if a non-profit is serving our shared community, they are very often and likely serving our students), they are also vying alongside Mesa's Office of Resource Development for a finite set of resources. National events, policy shifts, natural disasters, and a dramatic political environment have drawn attention and created a sense of urgency for donors to give to other causes.

(REQUIRED) Areas of Focus

Describe one or more areas that your department is focusing on. You will refer to this response in the Program Analysis Section.

The department will be focusing on the following areas:

1) Build Team and Establish Roles, Workflow Practices.

Who: Krista Stellmacher + RD Admin Tech + NANCE.

Why: Build capacity to grow program.

How: Wee Service Area Analysis, Goals and Action Plans sections.

2) Develop and Implement Fundraising Plan, Reach into Untapped Constituencies.

Who: Krista Stellmacher + President + Board of Directors.

Why: Increase support in service to the students and mission of Mesa College.

How: Wee Service Area Analysis, Goals and Action Plans sections.

3) Build Out All Stages of Donor Cycle.

Who: Krista Stellmacher + RD Admin Tech + NANCE + Board of Directors + Relationship Leads across the campus.

Why: Increase support in service to the students and mission of Mesa College.

How: Wee Service Area Analysis, Goals and Action Plans sections.

4) Continue to Improve Processes and Develop More Standard Operating Procedures.

Who: Krista Stellmacher + RD Admin Tech + NANCE in collaboration with Accounting, Student Affairs, and other partners across the campus.

Why: Increase efficiencies to grow capacity, remove ambiguity and error.

How: Wee Service Area Analysis, Goals and Action Plans sections.

Form: "2018/19 Comprehensive Program Review Administrative Services Outcomes and Assessment Section"

Created with : Taskstream

Participating Area: Office of Resource Development

(REQUIRED) Service Area Name

Resource Development

(REQUIRED) We are halfway through our 6-year cycle. Is your area on target to complete assessment by Spring 2022? Please attach your schedule for assessment, with explanations as needed.

Refer back to Direction #3 on how to attach documents.

Yes, we are on target to complete assessment by Spring 2022, as indicated in the schedule below.

Year 1 – 2016-2017:

Build infrastructure, develop policies and procedures, begin to articulate goals. Research and select database to gather, store, and report on fundraising outcome data.

Year 2 – 2017-2018:

Migrate and adopt donor database. Conduct baseline assessment for Administrative Unit Outcome 1.

Year 3 – 2018-2019:

Update Administrative Unit Outcomes. Get fully trained and configure donor database, generate reports to begin to assess Administrative Unit Outcome 2.

Year 4 – 2019-2020:

Conduct baseline assessment for Administrative Unit Outcome 3. Conduct follow-up assessment for Administrative Unit Outcome 1.

Year 5 – 2020-2021:

Conduct qualitative assessment and generate multi-year quantitative report on Administrative Unit Outcome 2.

Year 6 – 2021-2022:

Conduct follow-up assessment on Administrative Unit Outcome 3.

(REQUIRED) Please list your AUOs.

- 1) Foundation **Board members** will receive the support, data, & communication from the Office of Resource Development to have an **enriching volunteer experience & successfully advocate for Mesa's students and mission.**
- 2) **Current and prospective donors and partners** will be meaningfully engaged by the Office of Resource Development such that they **continue and increase support for San Diego Mesa College Foundation.**
- 3) **Mesa Faculty and Classified Professionals** will have the information and resources to **improve their familiarity and comfort with fundraising and support the development efforts of the College and Foundation.**

(REQUIRED) What have your completed assessments revealed about your area?

An initial baseline assessment for Administrative Unit Outcome 1 was conducted in the summer of 2018. AUO 1 is as follows: Foundation board members will receive the support, data, & communication from the Office of Resource Development to have an enriching volunteer experience & successfully advocate for Mesa's students and mission.

To gather a baseline assessment, the Office of Resource Development worked with San Diego Mesa College Foundation's Board Relations Committee to conduct a Board Survey.

The Board Survey was created on a Google Form and distributed to 12 Board Members. It consisted of 14 questions in the form of a rating scale and 4 open-ended, qualitative questions. Eleven Board members responded, resulting in a response rate of 92%.

The completed surveys revealed the following trends:

Areas of Celebration:

- 6 Board members commented about the positive impact of scholarships
- 7 spoke to the value of helping students
- 5 commented on the quality of the people they worked with
- Participants ranked the Foundation high in:
 - Engendering feelings of accomplishment
 - Aligning with personal passion
 - Producing reports on finances
 - Allowing for learning about Mesa activities

Areas of Growth Opportunity:

- 7 Board members commented on bringing new talent to Board

- 3 spoke to increasing the diversity on the Board
- 2 sought fundraising expertise
- 2 sought business/finance expertise
- Participants ranked the Foundation low in:
 - Having clear benchmarks
 - Meetings addressing significant matters
 - Representation in the outside community
 - Board composition

(REQUIRED) If issues or problems were identified, what is your plan for implementing change?

Gains have already been made for a majority of the areas of improvement that were identified through the 2018 Board Survey.

Area of Improvement Identified:	Action Taken:	Initial Results:
Low Ranking: The Board has an appropriate balance of skills, diversity, experiences and backgrounds	Board Relations Committee created a structure for "capacity mapping" to identify priority areas of expertise as well as a process for selection. From there, the Board began seeking additional talent. Additional, an Honorary Board proposal was developed.	5 new Board members and 1 co-member added to the Board with expertise identified. Of those, 2 have fundraising expertise and one has finance/business expertise.
Low Ranking: Board and Committee meetings properly address significant matters	Committees now create written reports ahead of the Board meeting such that "information sharing" takes place outside of meetings and meeting time is dedicated to substantive discussions. Board and Committee agendas include desired goal/outcome for each agenda item.	The full Board has had one retreat meeting since implementing the Committee report policy. At each meeting, the Board engaged participants in activities and discussions, generating many ideas. A follow-up assessment has not yet been conducted, but anecdotal evidence indicates that members seek more meetings.
Low Ranking: The Board has established appropriate and clear benchmarks against which the strategic, fundraising, and operating plans can be measured	With Director's support, the Board Relations Committee established a practice of ensuring that all Committees have annual goals and submit annual reports evaluating their success and reflecting on their performance.	All Committees and the Board submit an annual report ahead of the 2019 retreat. Two committees and the Board have finalized 2019 goals, and a committee has drafted goals and a schedule to complete goals by January 2019.
Low Ranking: The Foundation represents Mesa College effectively to our community	The Foundation has done a few outreach events and will continue to build this out through the Advancement/Impact Committee's goals.	With the support of new Board member Alex Szeto, the Foundation president, Northrop Grumman, was featured in the company's newsletter, hosted a virtual event from the company for a resume and engineering panel, and presented at a company event. Additionally, the Foundation deepened the relationship with the Clairemont Town Council and was invited to their annual Garden Tour.

(REQUIRED) Based on your assessments, have you identified resource needs?

- Budget
- Classified Professionals

Please provide any other comments.

While we have identified constraints to our outcomes based on the current staff capacity, we will not be submitting a request for additional classified professionals at this time. The Office of Resource Development was able to create an Admin Tech position in 2018 and will be focused on building out the team with this new role. Additional classified professional support and budget would likely yield more results, and will be assessed at a future time.

Form: "2018/19 Comprehensive Program Review Administrative Services Program Analysis Section"

Created with : Taskstream

Participating Area: Office of Resource Development

(REQUIRED) Service Area Name

Resource Development

(REQUIRED) Given your stated area(s) of focus in Part 4, has your service area introduced new or different actions that have changed how you do your work? Please describe.

Focus Area: *Build Team and Establish Roles, Workflow Practices –*

Actions:

- Created a job description for a new, full-time RD Admin Tech position and underwent hiring and selection process
- Created a training guide outlining all tasks for the routine operations of the department and Foundation
- Adopted a cloud-based team project management system
- Established weekly team meetings
- Shifted the role of the Director to include more team and project management time, more time handing off and training, less time doing the administrative tasks

Focus Area: *Develop and Implement Fundraising Plan, Reach into Untapped Constituencies –*

Actions:

Thus far, we have simultaneously increased fundraising efforts (without a plan in place) while building out some of the tools to plan and launch a clearly strategized fundraising program. Namely, we:

- Launched the Mesa Promise campaign, which surpassed its goal and brought \$75,000 to the SD Promise
- Created a structure for sponsorships and increased sponsor revenue for the Annual Scholarship Awards Ceremony
- Generated prospect lists
- Created guidelines for donor acknowledgement and stewardship
- Adopted a donor database to allow us to scale our efforts at contacting donors
- Created and implemented guidelines for follow-up before and after events
- Other activities

Focus Area: *Build Out All Stages of Donor Cycle –*

Actions:

- Identification: Consolidated and updated contact information for all current donors, worked with Board to identify new prospects via their networks, requested and gathered current vendor list
- Cultivation: Conducted campus tours, did outreach presentation to Northrop Grumman, invited prospects to engineering panel and resume workshop, expanded and refined invite list for President's Breakfast
- Solicitation: Requested support via Giving Tuesday, Homecoming Pay-it-Forward, Scholarship Renewal, Board Giving, Annual Scholarship Awards Ceremony, and Mesa Promise Match Campaigns; developed scalable tools for solicitation for Board during Mesa Promise Match Campaign
- Acknowledgement: Created and partially implemented a 7-touchpoint acknowledgement practice
- Stewardship: Created Scholarship photo and student thank-you cards; invited select donors to engineering panel and resume workshop, expanded and refined invite list for President's Breakfast; began to invite donors to campus events in line with interest area

Focus Area: *Continue to Improve Processes and Develop More Standard Operating Procedures –*

Actions:

- Donation/Gift Processing:
 - Moved online giving from Paypal to Safesave merchant services
 - Selected, adopted, and began configuration of donor and donation tracking database to be able to label donations by campaign, solicitation, and segment donors; developed data entry practices
- Innovation Grants:
 - Created outreach materials for innovation grants, including frequently asked questions, guidelines for project management, and reminder calendar
 - Updated and created additional materials for grant review and selection including process overview, scoring rubric, consolidated score sheet
 - Created and implemented award materials including grant agreement, award letter, final report, frequently asked questions
- Scholarships and Endowments:
 - Developed master reconciliation spreadsheet to track all scholarships across the portfolio, identify discrepancies between accounting and student affairs; currently in the process of updating all scholarships in accounting to reflect current active portfolio
 - Developed scholarship cycle tracking spreadsheet to manage post-award scholarship process across stakeholder groups, including student affairs, accounting, and student accounting; workbook implemented for disbursement processes, check cutting, eligibility verification
 - Created and implemented eligibility exception process
 - With student affairs, revised scholarship creation and renewal process to move online, created form and logic/rules/SOPs for entry into Academic Works

- Established processes to ensure consistent and thorough outreach processes for scholarship renewal
 - Scanned and saved all endowment agreements; entered endowment criteria in alignment with new scholarship renewal process; identified endowments that are being administered in a separate process from the agreement form; currently identifying those that need updates to criteria
- Program Accounts:
 - Developed practices, roles, guidelines, and agreements for Program Accounts, updated select Program Accounts
- Grant-seeking:
 - Developed Step 1 of campus grant-seeking process: Intent to Apply
- Accounting Practices:
 - Developed SOPs and monthly reports for providing accounting with online donation data

(REQUIRED) How do you create an environment that fosters equity, diversity, and inclusion?

By their very nature, the Office of Resource Development and Foundation are designed to address student needs, which often align with unique barriers brought on by structural inequities such as the access, achievement gaps, unconscious bias, the challenges that come with poverty and economic instability, etc. The office works alongside college leadership to understand the highest priority needs to respond to. In other words, integral to the mission of the RD Office and Foundation is a commitment to equity.

What's more, the manner in which the office operates always aims to foster equity, diversity, and inclusion. This is manifested in approaches to decision-making, hiring, Board development, programmatic development, and story-telling. Examples of programmatic development include managing scholarship cycles in a manner which provides the most equitable access to funds, distributing funds in a manner that addresses students' financial needs and reduces administrative barriers, always honoring student's time and providing incentives for participation in activities so as not to stretch students' resources even more thin. Examples of equity in story-telling include focusing on the capabilities of students while advocating for their experiences and shedding light on unique barriers they may face, which is to say framing students as whole and capable individuals rather than broken and in need of help.

(REQUIRED) Do you see trends in access to your services? What changes might you foresee in the next 2-3 years?

Currently, the availability of data for access to services varies by constituent group, and is broken down as follows:

Donors: In the one year for which we have accessible data, we can observe increased engagement with the Department of Resource Development as evidenced by the large number of first time donors. In 2018, there were 227 first-time donors to the Foundation, 24 of which were above \$1,000. As our data and evaluation methods get more sophisticated, we will be able to track donor retention,

increases in donation amounts, and campaign results. With the investment in staff capacity, we expect to see this positive trend continue.

Campus Community: Little data is available about the familiarity and use of services from the campus, with the exception of Innovation Grants (formerly Mini-Grants). There is reliable data for the number of applicants to Foundation requests for proposals for one full year and breaks down as follows: Fall 2017 Cycle – 27 applicants; Spring 2018 Cycle– 12 applicants; 2019 Annual Cycle – 24 applicants. Because of the variance between the semesters and the lack of more data points, no trend may be observed. Additional assessment will be done to assess the campus community's access to services, which is expected to be limited at baseline (follow-up and follow-through for the entire campus is a challenge within current capacity constraints) and expected to improve with additional capacity and the creation of scalable fundraising toolkits and support.

(REQUIRED) Do you have a vision for your area's future? Do you have ideas for changes to services or procedures? Please explain.

There is a clear vision for building upon and expanding efforts across all areas of focus as follows:

Focus Area: *Build Team and Establish Roles, Workflow Practices –*

Vision:

- Transition of more administrative functions to RD Admin Tech
- Expansion of role of Director to include more community outreach and donor/partner communication
- Training for entire team on Donor Database
- Dedicated support for Alumni Engagement
- Increased support for Events
- Increased grant-seeking support

Focus Area: *Develop and Implement Fundraising Plan, Reach into Untapped Constituencies–*

Vision:

- Documented plan and calendar
- Implementation of key strategies:
 - Employee Giving
 - Board Giving
 - Annual Appeals: Homecoming, Giving Tuesday, and a Responsive Initiative
 - Grants
 - Corporate Sponsorships
 - Events
- Documented assessments of results

Focus Area: *Build Out All Stages of Donor Cycle –*

Vision:

- Quarterly electronic mailer
- Build out of tiered giving circles
- Engagement plans for key constituencies: distinguished alumni, President's Circle (and other giving circles), corporate partners, first-time donors, etc.
- Scalable "toolkits" for sponsorship requests, event outreach and follow-up, grant-seeking
- Development of web content and collateral materials, annual report

Focus Area: *Continue to Improve Processes and Develop More Standard Operating Procedures –*

Vision:

- Standard reports, dashboards, and metrics to measure campaign and overall fundraising results
- Continued updates to scholarship management process, including: archiving old scholarships in accounting, continued updates to accounting to reflect current cycle, revised outreach process to include all pertinent information for donors (balance, etc.), development of clear project plan and timeline
- Update all Program Accounts to use agreement form, conform with management practices
- Monthly financial reports and reconciliation
- Document SOPs
- Full build-out of all steps of grant-seeking process, including internal review and grant-seeking toolkit and trainings with templated content, helpful tips, and internal resource guide

(REQUIRED) Describe how your area interacts and collaborates with other College areas/programs and the effects of that interaction

The Office of Resource Development collaborates with many areas of the campus, including but not limited to:

Communications: to develop outreach strategies and as an internal customer for materials development

Administrative Services: to ensure proper stewardship of funds, Foundation management, event coordination, and as an internal customer for accounting support

Student Affairs: for scholarship cycle management

EOPS, Veterans Counseling, Equity, and Fast Scholars: for distributing emergency relief to students

Student Services: for story-telling

Campus-wide Faculty and Classified Professionals: for assisting with Innovation Grants, Program Accounts, Scholarships, fundraising events, campus events, and story-telling

Outcomes and Assessment (REQUIRED)

Form: 2018/19 Comprehensive Program Review Administrative Services Outcomes and Assessment Section (See appendix)

Service Area Analysis (REQUIRED)

Form: 2018/19 Comprehensive Program Review Administrative Services Program Analysis Section (See appendix)

Service Area Goals (REQUIRED)

2018-2019 Goals for the Office of Resource Development

Goal

Goal	Mapping
Develop and execute comprehensive fundraising plan- Establish a fundraising plan with an outlined approach to distinct fundraising methods across a variety of revenue sources (e.g., personal solicitations, events, social media/direct mail campaigns, board and employee giving, giving circles, etc.). Execute, then measure results to establish baseline and set subsequent priorities.	CA- Mesa College Strategic Directions and Goals: Strategic Goal 1.2, Strategic Goal 1.4, Strategic Goal 1.6, Strategic Goal 4.1, Strategic Goal 6.1
Build Team and Establish Roles, Workflow Practices – Onboard and train new RD Admin Tech, transition administrative workload to RD Admin Tech, begin expansion of role of RD Director.	CA- Mesa College Strategic Directions and Goals: Strategic Goal 1.1, Strategic Goal 1.2, Strategic Goal 1.6, Strategic Goal 4.1, Strategic Goal 6.1
Continue to Improve Processes and Develop More Standard Operating Procedures – Create reports and dashboards; continue to update scholarship management process; update all Program Accounts	CA- Mesa College Strategic Directions and Goals: Strategic Goal 1.2, Strategic Goal 1.4, Strategic Goal 1.6, Strategic Goal 6.1

Action Plans (REQUIRED)

Actions

2018-2019 Goals for the Office of Resource Development

Goal

Goal: Develop and execute comprehensive fundraising plan-
Establish a fundraising plan with an outlined approach to distinct fundraising methods across a variety of revenue sources (e.g., personal solicitations, events, social media/direct mail campaigns, board and employee giving, giving circles, etc.). Execute, then measure results to establish baseline and set subsequent priorities.

Action: Carry Out Key Campaigns

Describe the actions needed to achieve this objective:	Current campaigns that have either been established or are a priority include: Board Giving, Annual Appeals: Homecoming, Giving Tuesday, and a Responsive Initiative (expected to be for Emergency Relief/Basic Needs), Scholarship Awards Ceremony, Taste of Mesa, etc.
Who will be responsible for overseeing the completion of this objective:	Krista Stellmacher
Provide a timeline for the actions:	Ongoing
Describe the assessment plan you will use to know if the objective was achieved and effective:	Each activity will result in philanthropic revenue.
List resources needed achieve this objective	n/a

and associated costs
(Supplies, Equipment,
Computer Equipment,
Travel & Conference,
Software, Facilities,
Classified Staff, Faculty,
Other):

▼ **Action:** Develop Fundraising Plan

Describe the actions
needed to achieve this
objective:

Evaluate historical results by campaign,
establish goals, draft plan, route for review and
approval.

Who will be responsible
for overseeing the
completion of this
objective:

Krista Stellmacher

Provide a timeline for
the actions:

Rough outline of plan developed in January that
will capture planned activities. Depending on
the demands of the scholarship cycle and
training of new hire, data assessment to
outline historical results and goals may take
place in June-July.

Describe the
assessment plan you
will use to know if the
objective was achieved
and effective:

A plan exists and can be used to calendar
activities, team is aligned around shared
understanding of goals and priorities.

List resources needed
achieve this objective
and associated costs
(Supplies, Equipment,
Computer Equipment,
Travel & Conference,
Software, Facilities,
Classified Staff, Faculty,

n/a

Other):

Goal: Build Team and Establish Roles, Workflow Practices –

Onboard and train new RD Admin Tech, transition administrative workload to RD Admin Tech, begin expansion of role of RD Director.

▼ **Action:** Expand Role of RD Director

Describe the actions needed to achieve this objective:

First, the RD Admin Tech will need to be fully trained and tasks transitioned to her. Then, Director will need to consult with President to prioritize exactly how to expand the role. Finally, RD Director can take on new tasks and responsibilities.

Who will be responsible for overseeing the completion of this objective:

Krista Stellmacher

Provide a timeline for the actions:

January - May: Training of RD Admin Tech
June : Prioritization of new roles
July onwards: Expansion of activities

Describe the assessment plan you will use to know if the objective was achieved and effective:

Ultimately, more goals will be achieved and fundraising results will improve.

List resources needed achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference,

Potentially would need funds to join external community groups (e.g., Rotary Club, etc.)

Software, Facilities,
Classified Staff, Faculty,
Other):

▼ **Action:** Train RD Admin Tech & Transition Admin Tasks

Describe the actions
needed to achieve this
objective:

Using the training document created, provide
knowledge transfer for all routine
administrative tasks, document steps and best
practices. Enroll in Donor Perfect training
webinars (free) and use training hours
(previously purchased with migration).

Who will be responsible
for overseeing the
completion of this
objective:

Krista Stellmacher

Provide a timeline for
the actions:

January - March: - Donor Perfect training - Data
entry and management training -
Acknowledgement process training -
Scholarship Management training - Initial event
management training April - June: - Document
management training - Meeting and campus
tour prep training - Constant Contact training
July - September: - Continued event
management training October - December: -
Innovation Grants management training

Describe the
assessment plan you
will use to know if the
objective was achieved
and effective:

Employee will be able to execute key tasks
with confidence.

List resources needed
achieve this objective
and associated costs
(Supplies, Equipment,
Computer Equipment,

n/a

Travel & Conference,
Software, Facilities,
Classified Staff, Faculty,
Other):

Goal: Continue to Improve Processes and Develop More Standard Operating Procedures –
Create reports and dashboards; continue to update scholarship management process;
update all Program Accounts

▼ **Action:** Create reports and dashboards

Describe the actions needed to achieve this objective:	Configuration of data in donor management system, dialogue with stakeholders on report needs, development of reports, calibration based on stakeholder feedback
Who will be responsible for overseeing the completion of this objective:	Krista Stellmacher
Provide a timeline for the actions:	January - May: Configuration of data in donor management system June - August: Dialogue with stakeholders, creation of reports
Describe the assessment plan you will use to know if the objective was achieved and effective:	Reports are consistently generated and help in evaluating and growing program.
List resources needed achieve this objective and associated costs (Supplies, Equipment, Computer Equipment,	n/a

Travel & Conference,
Software, Facilities,
Classified Staff, Faculty,
Other):

▼ **Action:** Update all Program Accounts

Describe the actions
needed to achieve this
objective:

Identify Program Account leads, meet with
leads to describe updated guidelines, work with
leads to complete agreement forms, update
accounting to reflect new Program Accounts.

Who will be responsible
for overseeing the
completion of this
objective:

Krista Stellmacher

Provide a timeline for
the actions:

Ongoing, with all Program Accounts updated by
June 2019.

Describe the
assessment plan you
will use to know if the
objective was achieved
and effective:

All Program Funds on the books will have an
Agreement Form.

List resources needed
achieve this objective
and associated costs
(Supplies, Equipment,
Computer Equipment,
Travel & Conference,
Software, Facilities,
Classified Staff, Faculty,
Other):

n/a

▼ **Action:** Updates to Scholarship Management Process

Describe the actions needed to achieve this objective:

Identify all endowments that must be updated/managed in accordance with agreement, update all accounting practices to reflect most current portfolio, update outreach strategies, update award cycle tracking tools, create overall project plan and timeline

Who will be responsible for overseeing the completion of this objective:

Krista Stellmacher

Provide a timeline for the actions:

All updates completed by November 2019

Describe the assessment plan you will use to know if the objective was achieved and effective:

All stakeholders will be aware of and able to implement scholarship management practices

List resources needed achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference, Software, Facilities, Classified Staff, Faculty, Other):

n/a

Closing the Loop (REQUIRED)

Form: 2018/19 Comprehensive Program Review Administrative Services Closing the Loop (See appendix)

Form: "2018/19 Comprehensive Program Review Administrative Services Closing the Loop"

Created with : Taskstream

Participating Area: Office of Resource Development

(REQUIRED) Service Area Name

Resource Development

(REQUIRED) Which one(s) of the following were received in past year?

- Classified Professional

(REQUIRED) How have these resources benefited your service area?

The Classified Professional will begin in December of 2019, after which as assessment can be made.

Request Forms

 **BARC & Facilities Requests**

 **Classified Position Request**

 **Faculty Position Request**

Reviewers

Liaison's Review

Form: Administrative Unit Program Liaison's Review 2018/19 (Comprehensive)

Manager's Review

Form: Administrative Unit Program Manager's Review 2018/19 (Comprehensive)

Appendix

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- A. **2018/19 Comprehensive Program Review Administrative Services Program Overview Section** (Form)
 - B. **2018/19 Comprehensive Program Review Administrative Services Outcomes and Assessment Section** (Form)
 - C. **2018/19 Comprehensive Program Review Administrative Services Program Analysis Section** (Form)
 - D. **2018/19 Comprehensive Program Review Administrative Services Closing the Loop** (Form)
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