Program Review

Summary and Reflections with Unit Goals, Action Plans, and Updates

Leadership - Office of Resource Development

Executive Summary

Describe the successes and challenges your unit has faced since the last comprehensive review.

2022/2023
This unit has faced both significant challenges and experienced noteworthy successes since the last comprehensive review in 18/19. During this period, the department encountered various obstacles, including staff turnover, the impact of a global pandemic, and ongoing operational challenges, particularly related to fiscal management. Despite these setbacks, the unit demonstrated resilience and achieved notable accomplishments. This report will outline the specific challenges, the corresponding impact on fundraising efforts, and the subsequent recovery and growth experienced by the department.

Staff Turnover:
One of the major challenges faced by the unit was staff turnover. The departure of key personnel significantly disrupted operations and created a lack of continuity within the team. The director's absence due to maternity leave, followed by the interim director leaving prematurely to accept another position, posed a considerable strain on the department. Furthermore, the RD Admin Tech, who was responsible for critical administrative tasks, went on extended leave and later resigned. Given the lean staffing structure, the absence of cross-trained individuals for these roles further exacerbated the challenge.

Impact of the Global Pandemic:
The outbreak of the global pandemic presented unprecedented challenges for the department. To ensure the safety of staff and stakeholders, all operations were transitioned to remote work. This sudden shift required a rapid adjustment to new remote work practices, including the remote management of donor stewardship and cultivation efforts. Fundraisers across industries struggled to adapt to social distancing measures while attempting to build meaningful engagements with donors. As a result, the department experienced a significant reduction in fundraising results across sectors.

The combination of staff turnover and the impact of the pandemic resulted in a notable decrease in revenue during the fiscal year 2020-2021, as well as “bumpy” operations wherein we were over a year behind in our audited financial statements, 9 months behind in routine monthly financial processes, and unable to uphold our commitment of acknowledging donors within 2 weeks of their donation.

Despite the challenges faced, the unit was able to regain stability and achieve above-average results in the subsequent fiscal year, 2021-2022. We were able to leverage a transition of leadership and retirement of President Emeriti Dr. Pamela Luster to host our first fundraising event, the Celebration of Equity and Excellence, and established a #MesaGivingDay to augment our annual scholarship appeal. We were able to complete our audited financials and file our FY20-21 990, as well as catch up on monthly reports, select a new vendor for our CPA/bookkeeping firm, and increase the automation of our scholarship processes and touchpoints.

If applicable, describe any major curricular or service changes your unit has engaged in and the impact of those changes since the last comprehensive review.
N/A

If applicable, describe the impact of any new resources (human, fiscal, etc) on the unit and/or action plan implementation.
N/A

If you assess OUTCOMES, please confirm that the outcomes have been reviewed for accuracy. If you do not assess Outcomes, skip this question.
Reviewed & Accurate

Summary and Reflection

Related Documents for Charts and Graphs

6f_SDMCF_ 2023 DEI Assessment _Summary_ DRAFT_ 6 July 2023_ (2).pdf;
BenchmarkingResearch - Summary.pdf;
DonorSurvey6-28-23_Summary.pdf;
DonorSurveyData_Detail.pdf;
Mesa_Foundation_Survey_2022_Summary_PDF.pdf;
OHA-San Diego Mesa College Foundation.pdf;
SDMCF Strategic Plan - 2024-2029 FINAL (1).pdf;
Boodrookas_NCCF_Benchmarking_Preso (2).pdf;
CCS FindingsDevelopment Campaign Preso (2).pdf;
donorperfect.net_a_financial_sbm.asp.pdf;
Advancement_Report_AppealAndFocus_FY23-24_2024-08-18.pdf;
FYComparison.pdf;
SDMCF_2024Retreat_Session3Intro (1).pdf

Executive Summary Complete

Yes

Data Reflection

Trends observed in program/service area's data.

The combination of staff turnover and the impact of the pandemic resulted in a notable decrease in revenue during the fiscal year 2020-2021. The average revenue, which was previously $429,000, dropped to a low of $261,620. This reduction affected all fundraising appeals, but the most significant decline was observed in campus events, which had to be completely shut down. As a result, the department experienced a loss of $15,000 compared to the previous year.

Despite the challenges faced, the unit was able to regain stability and achieve above-average results in the subsequent fiscal year, 2021-2022. The revenue yield increased to $493,150, demonstrating a strong recovery. Moreover, this positive momentum has been sustained in the current fiscal year, with revenue amounting to $458,770, even with one less appeal compared to the prior year. This achievement is particularly noteworthy considering the absence of a fundraising gala or event, such as the Celebration of Equity and Excellence, which had traditionally contributed to fundraising efforts. However, there is an alarming trend when it comes to donor retention, acquisition, and attrition. The number of new donors decreased in FY19/20 (294 down from 367), 20/21 (178), bumped slightly in 21/22 (245) and is back down in 22/23 (134). Our attrition rate is at nearly 70% and reactivated donors, which peaked at 80 last year, is down to 38 this year. The total number of donors peaked in FY21/22 at nearly 500, and we are down to roughly 300 this year and our net promoter score is currently at 15, well below a desirable 40. However, our donors are saying that we are acknowledging them well and the process of donating is easy.

Describe any equity gaps in the data. Are there differences and/or patterns observed by demographics (e.g.race/ethnicity, gender, age, etc.)

Our office works with the Office of Institutional Effectiveness each year to conduct an equity analysis of our scholarship portfolio. While we do not have the most recent year's results yet (expected by fall of 2023), we now have 3 years of data that began immediately following the most recent comprehensive review. The results showed that, while the number of applicants and awardees by racial and ethnic group is largely consistent with the larger Mesa population, we originally noted disparities in the average award amount per awardee along racial lines, with the number of awards and value of awards for African American students being disproportionately lower than white an Asian counterparts in 2019. This tells us that, because of the way we have structured our scholarships, we were not closing equity gaps but rather reinforcing systems that do not well serve our BIPOC students. In response to these findings, we worked alongside the Dean of Student Affairs and the Dean of Student Success and Equity to make immediate adjustments to our processes and established the Resiliency Fund to provide a more needs-based method of tapping into philanthropic dollars with fewer barriers to access. The 2020 and 2021 data is promising, with a possible trend in the opposite direction towards a higher average award amount for African Americans and an increased number of Awards Received such that both African Americans and Latinx students received more than the average number of awards. We are continuing this assessment and work, and this year for

the first time have data on the intentions of our donors in creating scholarships (to award academic merit, address economic need, support a subpopulation, or honor a loved one's legacy). We will use this data to better understand: 1) the balance of our scholarship portfolio based on donor's intentions; and 2) any gap between a donor's intentions and the scholarship eligibility criteria.

Related Documents for Charts and Graphs
2021 Scholarship Equity Analysis.pdf;
6f_SDMCF_ 2023 DEI Assessment_ Summary_ DRAFT_ 6 July 2023_ (2).pdf;
BenchmarkingResearch - Summary.pdf;
DonorSurvey6-28-23_Summary.pdf;
DonorSurveyData_Detail.pdf;
Mesa_Foundation_Survey_2022_Summary_PDF.pdf;
OHA-San Diego Mesa College Foundation.pdf;
SDMCF Strategic Plan - 2024-2029 FINAL (1).pdf

Describe the discussion(s) that took place about the unit's learning outcomes assessment data.
The Scholarship Equity Analysis was presented at the San Diego Mesa College Foundation's Impact Committee and Board. What's more, continued data points regarding our revenue results to our Advancement Committee, Finance Committee, and Board. This year, we also have an Ad Hoc Strategic Planning Committee that meets monthly to review the following data points: a Diversity, Equity, and Inclusion Audit; an Organizational Health Assessment by the ProActive Leadership Group; Benchmarking Data; a Change Agenda activity from our 2022 Board Retreat; a multi-year Board Survey; and a Donor Survey currently being conducted. All of these data points are being shared and synthesized for our upcoming 2023 Board Retreat.

Data Reflection Complete
Yes

Practice Reflection

Describe current practices your program/service area has engaged in that you believe impact the above data trends and equity gaps.
Upon the initial results of the scholarship equity analysis, we put together a scholarship equity task force to evaluate our practices and make adjustments. Through this: we were able to eliminate the reference requirement for the overwhelming majority of scholarships; host workshops and a donor event to share the results of the equity assessment and spur thinking about the ways in which all stakeholders (donors, scholarship leads, reviewers) could better serve students given structural barriers; adapt scholarship essay questions and rubrics; and consolidate the number of "unique criteria" so that students could better find scholarships that suited their needs. This included a remarkable speech by Tiffany, a student who explained, "it's hard to volunteer in the soup kitchen when you are in line in the soup kitchen." Upon the onset of COVID-19, we were able to pivot rapidly and immediately disburse all scholarships in full to support the financial needs and economic instability of our students, as well as raise over $20,000 to distribute weekly to students experiencing setbacks related to the pandemic. Additionally, we focused on expanding our strategies to include the Resiliency Fund, so that students have a means of accessing funds beyond an annual, competitive scholarship cycle wherein criteria are set by donors and into a programmatic fund designed by our Basic Needs Coordinator and Dean of Student Success and Equity. We were able to establish a permanent source of support in the form of an endowment. We also established the first-ever Diversity, Equity, and Inclusion Committee for the San Diego Mesa College Foundation Board and conducted and audit that revealed we have a lot of growing to do in order to catch up on the intentionality, formalization, and codification of our commitment to equity.

What other factors (internal or external) might also impact the above data trends and equity gaps?
There are many additional factors that could impact our equity data, both internal and external. We currently only have equity data on our scholarships, but not those who we serve through Innovation Grants, as a fiscal admin for academic or student service programs, the Resiliency Fund, or other areas of support. So, additional record-keeping would allow for more precision in knowing exactly who we are serving. Additionally, the composition of our staff and Board, as well as our donor base, is critical to our equity outcomes. We do not currently have data on the demographics of reviewers or donors, but philanthropy has historically been overrepresented by white donors and underrepresented by BIPOC communities. We are aiming to grow our Board to continue to represent various and

varied perspectives from our community, as well as start and continue conversations about the intersection of philanthropy and anti-racist work on and beyond our campus.

Related Documents for Charts and Graphs

Practice Reflection Complete
Yes

Mid-Cycle Updates

YEAR 2 Updates (2023 - 2024)
Provide any edits or updates to the prompts originally documented in the Executive Summary section for Year 2.
2023/2024 UPDATES
The unit has made significant gains in key challenge areas from the prior year, and has been met with new and exciting challenges:

SUCCESSES:
- Staff Turnover to Stabilization -
-Successes:
- With the hire of Administrative Technician Heidi Brogren and the blessing of a NANCE position, we have now had consistent staff that have developed critical institutional knowledge needed to get out of a "continually training and backfilling" cycle.
- With the hire of Evergreen CPA services, our Foundation now has the benefit of dramatically improved financial administration, management, and oversight with skilled expertise that functions at all levels; from book-keeping to CFO-level Board relations.
-Next Steps:
- Ms. Brogren will be expanding her role to take on additional operational and administrative functions (namely: scholarships, reporting) in order to free up the Director for more fundraising.
- As Evergreen finishes "cleanup" of prior year accounting, their capacity will shift to producing routine reports and, again, freeing up additional Director time.

- Operational/Systems Improvements -
-Success: Staff (Director) worked with a NANCE in the office of Institutional Effectiveness to develop a web-based solution for review, approval, and ranking of Innovation Grants using tools already bundled into the purchase of Office 365 licenses. This streamlines the process and reduces manual labor for both the Office of Resource Development and the campus at large. It also increases accuracy and establishes the foundation for capturing key metrics year-over-year.
-Next Steps:

- Strategic Planning & Alignment -
- Success: Staff (Director) worked diligently with an Ad Hoc Strategic Planning Committee and full Board to undergo the Foundation's first ever Strategic Plan, which will span the next five years and which outlines significant growth goals, including reaching 2.5 million in revenue (see attached document for details)
- Next Steps: launch the strategic plan among various stakeholder groups, including campus community at convocation, donors, alumni, volunteers, etc.

CHALLENGES & OPPORTUNITIES-
- Continued Capacity Constraints -
Continued capacity constraints include grant-writing and grant portfolio management and marketing/communications/social media content development for direct-to-donor correspondence. The use of AI to fill some of this gap is an interesting potential to explore, but it is important to note that in a benchmarking activity comparing like organizations to inform the Strategic Plan, the San Diego Mesa College Foundation was found to be the second lowest in terms of staff and yet mid-range in terms of fundraising results, making us one of the most efficient teams. That efficiency does come at the cost of significant untapped opportunity. Based on findings,

greatest overall efficiency is correlated with about $5 million in revenue and a team of about 7 (see attached document). Additional pain points can be observed on the Operational Health Assessment (attached), which ranks SDMCF very low in key performance areas. Providing adequate resources to our team would increase revenue and impact to students and the campus, reduce burnout, and improve morale.

-Operational Compliance-
Closely related to capacity constraints and the hire of Evergreen CPA as an improvement is the challenge of the timely completion of audited financial statements and 990 tax filing, with a corresponding impact on the Foundation's status with the California Attorney General's Office. Prior to onboarding Evergreen, our office--along with all Foundation offices and the District offices--faced significant challenges in timely collaboration with the external auditing firm. The Director put in countless hours to project management, escalation, and direct hands-on completion of documents that led to an eventual resolution, but in the meantime the Foundation was temporarily ineligible for grants. The good news: The Foundation will have a new auditing firm for the FY22-23 audit and is already off to a much more promising and professional start.

-DEI Efforts-
While San Diego Mesa College is relatively advanced in their Equity journey, the San Diego Mesa College Foundation is further behind, as evidenced by the attached baseline DEI Assessment. This provides opportunity for focused efforts at specific actions that can help move the needle rapidly and meaningfully, while simultaneously taking the time to do more nuanced work on culture and belonging.

-Fundraising and Donor Feedback-
A baseline donor survey and follow-up Board survey were completed to assess stakeholder support. The findings show that many are very satisfied with the Foundation's mission and impact, but would appreciate more opportunity for meaningful engagement and connection.

Provide any edits or updates to the prompts originally documented in the Data Reflection section for Year 2.
Yes

Review Outcomes Report. Review the unit’s outcomes assessment process for 2022 - 2023. Discuss connections to unit goals/action plans/resource requests.

Provide any edits or updates to the prompts originally documented in the Practice Reflection section for Year 2.
No

YEAR 3 Updates (2024 - 2025)

Provide any edits or updates to the prompts originally documented in the Executive Summary section for Year 3.
2023/2024 UPDATES
Despite challenges, the unit has made gains that, while incremental, are the greatest achievements possible with current resources and which will position the unit for future growth.

SUCCESSES-
I. Events:
In January of 2024, we hosted a ChangeMakers’ Breakfast to kick off the 60th anniversary for our donor/partner community and to gather a base of supporters for the Spirit of Mesa event planned for Fall. The event brought together 60 people who either gave or represented Mesa’s large donors - those who gave $5,000 and above. Featuring an opening by Dr. Ashanti Hands and a panel of student speakers with an invitation to get involved in supporting the Fall event via a “menu” of commitments, the breakfast then opened into the broader campus 60th anniversary celebration. While the event did not directly generate revenue, it was successful in cultivating existing donors, including a senior leader at the San Diego Foundation.

In September 2024, in partnership with Dr. Denise Rogers, the Office of Resource Development supported an event honoring Dr. Barbara Blackmun and debuting the World Art Gallery and Research Center. The event drew in $7,500 gross (estimated at approximately $1,500) and brought supporters of the collection (including Bill and

Michelle Lerach) closer to the collection. It featured a program that invited Dr. Visage-Blackmun (daughter of the late Dr. Barbara Blackmun) to deliver a keynote address. Fundraising methods beyond ticket sales included a silent auction and live, at-event ask.

In October 2024, we executed the first Spirit of Mesa Fundraising event, which brought in $60,000 gross and $7,000 net. The first-ever evening gala-like event aimed exclusively at fundraising, we succeeded in securing 18 sponsors and bringing in over 175 people. A reception included a silent auction and live music, and the seated dinner program featured MCs Lorenze Legaspi and Lucio Lira, Dr. Ashanti Hands, Pam Luster, Trish Guevarra, and student Angel Rene Wilson, then culminated with an invitation to invest in a live auction of “impact items” such as childcare or rent for a student. The program was a combination of uplifting, inspiring, and informative and the audience was highly engaged. This event is a big step forward into a more well-rounded fundraising program, and offers a blueprint that can be replicated in future years.

In November 2024, we supported the Taste of Mesa event, the financial results of which will be available in the first quarter of 2025.

(All these events were a success despite the challenge of the RD Administrative Technician vacancy described in the challenges section below.)

Next Steps:
- Under the mentorship of Leticia Diaz, form an internal Spirit of Mesa planning work group for an event in 2025, and work with the Board to secure more corporate partnerships and sponsors. Continue to refine the event and cultivate prospects to join who have the capacity to make meaningful at-event donations.

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II. Board Development:
We entered the turn of the fiscal year in June 2024 with a full slate of officers either terming off or stepping off the Board. Despite a lack of prior succession planning, several key volunteers stepped up to fill vacancies and provide extremely valuable leadership and fresh perspectives to the Board. Lorenze Legaspi is serving as President, and brings a college-wide perspective about financial needs as well as a leadership style that is both human-centric and efficient. Aviva McPherron stepped in as Vice President, Christine Lee as Treasurer, and Kim Heinle as Secretary. It is a first in the last half decade for the officer slate to be majority external/community members rather than college reps, and this combination succeeds in orienting the Board towards community partnerships rather than a replication of internal structures and dynamics.

Next Steps:
- Continue to recruit community board-members who have passion, interest, and capacity to support our mission.
- Support current officers in driving a change-agenda informed by the strategic plan and emerging opportunities and needs
- Evaluate bylaws and establish succession-planning practices

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III. State-wide Education Funders Site Visit:
Over Spring break, we were able to host a site visit for the San Diego Foundation and the California Education Funders Collaborative, a collection of state-wide foundations with an interest in supporting education. The site visit highlighted a “Tutor-to-Teacher” Pipeline initiative supported by the San Diego Foundation and including partners at Hoover High. A smooth site visit was challenging to coordinate in light of challenges with grant execution that had stemmed from turnover, challenges with the relationship with San Diego Unified, and complex dynamics between faculty and the Acting Dean. Staff worked directly with San Diego Foundation leaders and event-planning staff to put together an experience that both informed and inspired, centered student and faculty voices, and elevated not only Mesa and our partners, but also the cross-border region of San Diego.

Next Steps:

Summary and Reflection

- Several months after the site visit, Dr. Ashanti Hands met with Pamela Gray Payton of the San Diego Foundation, resulting in an immediate sponsorship of $5,000 for Spirit of Mesa and a follow-up interest in a grant for the Mesa ImpactshipProgram.

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IV. Operational Advances: Scholarship and Financial Management Expertise:
While we faced significant personnel challenges to our scholarship management this fall (see challenges section), we were able to secure the talent of Olivia Light, who is providing critical remote consulting support to ensure that our scholarship cycle moves forward on our standard timeline, and with high quality standards. Olivia brings attention to detail, as well as exceptional donor-relation and communication skills and a student- and mission-centric approach. Accessing her talent to shepherd our scholarships is a true success, especially in light of our vacancies and the additional demands brought on by Spirit of Mesa.

What's more, Evergreen Alliance CPA has continued to bring the best financial management services that we have experienced at the Foundation, and was able to elevate our endowment management practices, as well as overall financial accuracy and reporting. Our Director developed a template to improve endowment reports, and Evergreen was able to integrate financial data into this to provide our most professional and informative endowment performance reports to date. Additional projects include a chart-of-account cleanup to adhere to industry standards, updates to our deposit practices for greater accuracy and record-keeping, and overcoming legacy challenges to our audit while successfully filing our 990.

Next Steps:
- It is staff's strong recommendation that Olivia Light's services be secured to spearhead and effort to align our scholarship portfolio with leading practices and our strategic plan - an effort that Student Services jointly desires
- Evergreen Alliance will continue to work with staff to elevate reporting, audit, and filing practices, as well as daily operations.

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V. Strategic Advances: Board Retreat & District CCS Study:
Over the Summer Board Retreat and into Fall 2024, staff supported the San Diego Mesa College Foundation Board in strategic-level conversations that wove together: a) the Foundation's recently-finalized 5-year strategic transformational plan, b) the insights and expertise of Dr. George Boodrookas, fundraising consultant and former President of the Network for California Community College Funders, and c) the information presented in a feasibility study and report commissioned by the San Diego Community College District and conducted by CCS that indicated the region's philanthropic community has the capacity and appetite to support a $100 million campaign over the next 7 years. The Resource Development Director was active in gathering and providing data and bringing her voice to the process of evaluating and embarking on this philanthropic initiative, including vendor selection for the implementation phase. The Director was also successful in identifying the value of Dr. George Boodrookas, who delivered what one Board Member described as "the best fundraising presentation I've ever seen" and another, 15-year tenured Board member described as "the best retreat to date; each year, I think we cannot possibly outdo the last retreat, and then we do!" Dr. George Boodrookas will in fact present at the San Diego Community College District Foundation in February 2025. His presentation focuses on the findings of an evaluation of state-wide data/benchmarking and indicate that community college foundations need no fewer than 3 full-time staff members, and that high-performing organizations have ten full time staff members.

Next Steps:
- We will continue to work with Dr. Boodrookas and our Foundation Board to implement our strategic plan and evaluate it in light of CCS findings and the initiative
- We will begin our partnership with CCS in the form of coaching and will work with the group on recommendations for strategic growth

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Summary and Reflection

VI. Central Fundraising Support: Grant-seeking and Fundraising Plans:
In late Fall 2024, we hired Dr. Michael Letteiri, a NANCE to support capacity building in the area of central grant-seeking support for the campus, we are rounding out our fundraising program further. This position will help us: 1) create, codify, and train our campus community on grant-seeking efforts, procedures, and resources available; 2) configure our grant-tracking software; and 3) support grant solicitation efforts.

Next Steps:
- In Spring 2025, Dr. Letteiri will undertake a listening tour, brainstorming session with the Director, support the submission of 2 grants, and will draft process documents for review at various stakeholder meetings

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CHALLENGES & OPPORTUNITIES-
I. Challenge: Staff Turnover and Quality Assurance:
The Resource Development Administrative Technician role, held by Heidi Brogren until early October, faced challenges due to inconsistent support during her tenure. The position, which is demanding due to its wide range of responsibilities, requires a high level of organization and adaptability to meet the diverse needs of resource development efforts. Heidi's departure in early October has further highlighted the need for stability and effective support in this critical role. Addressing these challenges is essential to ensuring the continuity and quality of the Foundation's operations

Next Steps:
- The hiring committee for the RD Admnin tech position is well underway, and we expect to select on a new Admin Tech by February 2025
- We will work with Dr. Boodrookas and CCS to evaluate the best scope of work for this role, and identify how we can provide support to maximize the team while creating reasonable expectations.

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II. Challenge: Operational Setbacks and Scholarship Management:
The vacancy of the RD Admin Tech position coincided with the sabbatical of our Web Developer, Joel Arias, and the maternity leave of a key leader in our scholarship management from Student Affairs: Zulma. Likewise, a NANCE in the office of Institutional Effectiveness who had assisted in the migration of Innovation Grants to an online form had moved on to a full-time position outside the organization. The loss of these key personnel revealed that our Standard Operating Procedures and Technology solutions are still in a nascent stage and are heavily reliant on the expertise of those who built them. It was a challenge for our team, who are typically internal customers on these projects, to step into the role of technology developers. While we were able to maintain as much functionality as possible, it has required the director to serve in a much more heavily operational capacity than is healthy for the long-term success and growth of our fundraising efforts. The vacancies reveal that our use of enterprise technologies from existing (free) platforms, while very resourceful, increases on dependency on single personnel.

Next Steps:
- Staff highly recommends the continued support of Olivia Light to evaluate our scholarship portfolio's design and use of technology and drive a change-agenda over the next 2-3 years. This will allow ample time for strategic decision-making, stakeholder input, and donor communications.

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III. Challenge: Capacity Constraints & Donor Communication/Follow-Up:
The Foundation currently lacks sufficient staff to effectively follow up with donors and prospects after the Spirit of Mesa event. This gap in capacity poses a risk to donor retention and hampers our ability to cultivate relationships that drive fundraising growth. Without timely and meaningful follow-up, we miss opportunities to build lasting connections and secure ongoing support.

Summary and Reflection

Next Steps:
- Staff recommend prioritizing the allocation of resources to hire dedicated staff or services, or adequately supporting operations so that the director may shift to a focus on donor communication and stewardship.

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IV. Opportunity: CCS Campaign:
The upcoming 7-year, $100 million district-wide fundraising campaign, led by the consultant CCS, presents a significant opportunity to elevate our fundraising efforts. Through expert coaching, access to prospects, and a focus on major gift solicitation, this campaign will help expand our fundraising capacity and achieve higher levels of support. However, it also brings a challenge of increasing demands on an already under-resourced team. Additionally, as part of a multi-college district, we must navigate the complexities of collaboration and competition for philanthropic resources among the colleges and District, balancing the shared vision of the campaign with individual college needs and priorities. What's more, we will need to build a culture of philanthropy on our campuses and strategically bring stakeholders along so that the campus community sees value in the initiative. Finding the right dynamics to work effectively across the district, increasing team capacity, and campus stakeholder engagement will be crucial to the campaign's success.

Next Steps:
- College President Ashanti Hands, Foundation President Lorenze Legaspi, and Director Krista Stellmacher will meet with CCS and collaborate on how to best communicate with the campus community

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V. Opportunity: Call for Philanthropic and Community Support:
The current presidential administration's vocal stance against many of the institution's core priorities, values, and the needs and safety of diverse student groups presents an opportunity to galvanize stronger allyship and inspire generosity within the community. Through strategic partnerships and philanthropic support, we can rally resources to safeguard educational access, equity outcomes, and the well-being of our students. This moment calls for leveraging shared values to foster resilience and ensure the continued advancement of our mission.

Next Steps:
- Continue to work collaboratively with campus subject-matter experts on how policies are impacting students, and serve as a liaison to the philanthropic community.

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VI: Opportunity: Strong Team, Strong Results
Amanda Brown, Dr. Michael Letteiri, and Olivia Light are exceptionally talented and bring an incredible wealth of passion, expertise, skills, and commitment to our mission. What's more, we have a strong pool of candidates for the RD Admin Tech position. Krista Stellmacher continues to commit to professional and academic development and growth through a Master of Arts in Social Innovation, the UCLA Women's Leadership Instittue, and aims to pursue a doctoral program in line with the needs and goals of Mesa and the Foundation. Dr. Ashanti Hands and Lorenze Legapi are incredible leaders that are successfully guiding, supporting, and inspiring the team to excellence, and to have an interest and investment in philanthropy at the Chancellor-level is a joyful and exciting opportunity. This is an incredible team that has the skills to achieve strong results if given the resources and conditions for success. Mesa leads among the campuses for infrastructure and sophistication of operations and fundraising (simply on account of having had dedicated staff for the longest time) and is well positioned to elevate our results in light of upcoming opportunities. It is an exciting time to be on the team.

Next Steps:
- Continued professional development and team-building

Summary and Reflection

Provide any edits or updates to the prompts originally documented in the Data Reflection section for Year 3.
Additional documents have been provided: CCS Report + Dr. George Boodrookas Board Retreat Presentation + FY Results Comparison + Quarterly Annual comparison

Review Outcomes Report. Review the unit's outcomes assessment process for 2023 - 2024. Discuss connections to unit goals/action plans/resource requests.
n/a

Provide any edits or updates to the prompts originally documented in the Practice Reflection section for Year 3.
(see executive summary mid cycle updates)

YEAR 4 Updates (2025 - 2026)
Provide any edits or updates to the prompts originally documented in the Executive Summary section for Year 4.

Provide any edits or updates to the prompts originally documented in the Data Reflection section for Year 4.

Review Outcomes Report. Review the unit's outcomes assessment process for 2024 - 2025. Discuss connections to unit goals/action plans/resource requests.

Provide any edits or updates to the prompts originally documented in the Practice Reflection section for Year 4.

YEAR 5 Updates (2026 - 2027)
Provide any edits or updates to the prompts originally documented in the Executive Summary section for Year 5.

Provide any edits or updates to the prompts originally documented in the Data Reflection section for Year 5.

Review Outcomes Report. Review the unit's outcomes assessment process for 2025 - 2026. Discuss connections to unit goals/action plans/resource requests.
Provide any edits or updates to the prompts originally documented in the Practice Reflection section for Year 5.

Unit Goals, Action Plans, and Updates

Increase Fundraising

Unit Goal: Increase fundraising activity to include: an annual fundraising event held each year, increased support for grant-seeking across the campus, grow #MesaGivingDay, and maintain annual scholarship appeal.

Goal Status: Active

Beginning Year: 2022 - 2023

Projected Completion Year: 2025 - 2026

Mapping
Mesa College Strategic Plan: Roadmap to Mesa2030:

- **Completion - Objective 3:** Design and promote programs and services that intentionally target a reduction in equity gaps in completion outcomes (✓)
- **Completion - Objective 4:** Support students' access to resources to mitigate the impact caused by technological and basic needs insecurity (✓)

Action Plans	Updates
Action Plan Status: Active **Action Plan:** Goal 1 Action List: 1. Plan and execute annual fundraising gala 2. Increase grantseeking activity and tracking 3. Increase non-ask touchpoints to donors 4. Complete Strategic Planning for Foundation with growth goals **Action Plan Cycle:** 2025 - 2026, 2024 - 2025, 2023 - 2024, 2022 - 2023	**Submission Date**: 01/03/2025

Action Plans	Updates
	Action Plan Update: 1- Gala - In October 2024, we executed the first Spirit of Mesa Fundraising event, which brought in $60,000 gross and $7,000 net. The first-ever evening gala-like event aimed exclusively at fundraising, we succeeded in securing 18 sponsors and bringing in over 175 people. A reception included a silent auction and live music, and the seated dinner program featured MCs Lorenze Legaspi and Lucio Lira, Dr. Ashanti Hands, Pam Luster, Trish Guevarra, and student Angel Rene Wilson, then culminated with an invitation to invest in a live auction of “impact items” such as childcare or rent for a student. The program was a combination of uplifting, inspiring, and informative and the audience was highly engaged. This event is a big step forward into a more well-rounded fundraising program, and offers a blueprint that can be replicated in future years. 2- Grantseeking In late Fall 2024, we hired Dr. Michael Letteiri, a NANCE to support capacity building in the area of central grantseeking support for the campus, we are rounding out our fundraising program further. This position will help us: 1) create, codify, and train our campus community on grantseeking efforts, procedures, and resources available; 2) configure our grant-tracking software; and 3) support grant solicitation efforts. 3- Non-Ask Touchpoints This is an area of challenge with the limited resources we have, the RD Admin Tech vacancy, and the subsequent focus on operations from the Director. The President's Circle was kicked off but we were not able to sustain it with current resources. The Foundation currently lacks sufficient staff to effectively follow up with donors and prospects after the Spirit of Mesa event. This gap in capacity poses a risk to donor retention and hampers our ability to cultivate relationships that drive fundraising growth. Without timely and meaningful follow-up, we miss opportunities to build lasting connections and secure ongoing support. 4- Strategic Plan Over the Summer Board Retreat and into Fall 2024, staff supported the San Diego Mesa College Foundation Board in strategic-level conversations that wove together: a) the Foundation’s recently-finalized 5-year strategic transformational plan, b) the insights and expertise of Dr. George Boodrookas, fundraising consultant and former President of the Network for California Community College Funders, and c) the information presented in a feasibility study and report commissioned by the San Diego Community College District and conducted by CCS that indicated the region’s philanthropic communnity has the capacity and appetite to support a $100 million campaign over the next 7 years. **Update Year**: 2023 - 2024

Unit Goals, Action Plans, and Updates

Action Plans	Updates
	Action Plan Progress: On Track

DEI & Belonging Plan

Unit Goal: Use DEI Audit as a starting point to create and implement a DEI & Belonging Plan for the Foundation; re-launch Scholarship Equity Task Force; and begin campus communications about trust-based philanthropy and anti-racist philanthropic practices.

Goal Status: Active

Beginning Year: 2022 - 2023

Projected Completion Year: 2025 - 2026

Mapping

Mesa College Strategic Plan: Roadmap to Mesa2030:

- **Community - Objective 2:** Develop activities, spaces, and programs that support a sense of belonging with a focus on antiracism, historically minoritized groups, and inclusion. (✓)
- **Community - Objective 3:** Build a culture of communication that is evidence based, race conscious, institutionally focused, systemically aware, and equity advancing (✓)
- **Scholarship - Objective 2:** Evaluate and improve Diversity, Equity, and Inclusion practice in classroom environments, campus activities, departments, schools, and administrative units (✓)

Action Plans	Updates
Action Plan Status: Active **Action Plan:** Goal 2 Action List 1. Launch Scholarship Equity Task Force 2. Present on DEI in Philanthropy at Convocation 3. Develop DEI Action Plan **Action Plan Cycle:** 2025 - 2026, 2024 - 2025, 2023 - 2024, 2022 - 2023	**Submission Date**: 01/03/2025 **Action Plan Update**: All action plans encountered barriers due to severe capacity constraints, turnover and vacancy of our DEI committee, and the prioritization of fundraising and operational tasks, including Spirit of Mesa. That said, the Director joined CCF, Community-Centric Fundraisers, and identified a valuable resource in Bina Patel that helped integrate DEI into daily practice and leadership development. **Update Year**: 2023 - 2024 **Action Plan Progress**: Barriers Encountered

Increase Efficiency of Operational Practices

Unit Goal: Increase efficiency of operational practices including financial and scholarship management so as to open up more capacity for relationship management–friend and fundraising, which can be measured by reduction in meeting time, adherence to fiscal deadlines, and increased automation of scholarship processes.

Goal Status: Active

Beginning Year: 2022 - 2023

Projected Completion Year: 2025 - 2026

Mapping

Mesa College Strategic Plan: Roadmap to Mesa2030:

- **Completion - Objective 3:** Design and promote programs and services that intentionally target a reduction in equity gaps in completion outcomes (✓)
- **Completion - Objective 4:** Support students' access to resources to mitigate the impact caused by technological and basic needs insecurity (✓)

Action Plans	Updates
Action Plan Status: Active **Action Plan:** Goal 3 Action List: 1. Transition to new CPA/Bookkeeping firm 2. Transition to new banking institution 3. Embrace Texting technology to reach out to donors, scholarship leads, and reviewers and prepopulate all touchpoints and timeline 4. Increase number of volunteers for scholarship review **Action Plan Cycle:** 2025 - 2026, 2024 - 2025, 2023 - 2024, 2022 - 2023	**Submission Date**: 01/03/2025

Unit Goals, Action Plans, and Updates

Action Plans	Updates
	Action Plan Update: 1. CPA/Bookkeeping Firm We have successfully transitioned to Evergreen Alliance CPA, which has continued to bring the best financial management services that we have experienced at the Foundation, and was able to elevate our endowment management practices, as well as overall financial accuracy and reporting. Our Director developed a template to improve endowment reports, and Evergreen was able to integrate financial data into this to provide our most professional and informative endowment performance reports to date. Additional projects include a chart-of-account cleanup to adhere to industry standards, updates to our deposit practices for greater accuracy and record-keeping, and overcoming legacy challenges to our audit while successfully filing our 990. 2. New Banking We have been challenged to transition to a new financial institution due to the capacity constraints of our former Finance Committee Chair and Treasurer, but expect that with new leadership we will have more success. 3. Texting Technology We were modestly successful in integrating texting by way of Google Voice for follow-up to scholarship donors and leads. Larger efforts are no longer recommended given the shift to large-scale spamming via text that has made prospects and donors less likely to respond to this method. 4. Scholarship Review Donors We have made moderate gains but need to dramatically increase our volunteers or shift the way we manage scholarships to reduce administrative burden. **Update Year**: 2023 - 2024 **Action Plan Progress**: On Track