

Administrative Services Program Review 2019/20 UPDATE

Office of Resource Development

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General Information (Administrative Services Program Review 2019/20 UPDATE)

2019/20 Administrative Services Program Review

SUBMISSION INFORMATION AND UPDATES (REQUIRED)

A. Assignments

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

B. Updates

n/a

OUTCOMES AND ASSESSMENT (REQUIRED)

Form: 2019/20 Program Review Outcomes and Assessment Section (See appendix)

File Attachments:

1. Mesa College Foundation Survey 2018 - Results.pdf

Foundation Board Survey 2018 Results

2. Scholarship Analysis 2019 - Executive Summary.pdf

Equity Analysis Executive Summary

3. SDMCF_AdHocScholarshipCmte_DraftWorkplaRecommendations.pdf

Ad Hoc Scholarship Committee Draft Workplan

4. SDMCF_AdHocScholarshipCmte_Packet_10-15-19_(1).pdf

Ad Hoc Scholarship Committee Purposes

PROGRAM ANALYSIS FOR EQUITY AND EXCELLENCE (REQUIRED)

Form: 2019/20 Program Review Administrative Services Analysis Section (See appendix)

PROGRAM GOALS (REQUIRED)

2018-2019 Goals for the Office of Resource Development

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.

Mapping

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.

Mapping

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

Mapping

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 FOR GOALS (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 to achieve this objective and	Maintaining current operations with existing staff capacity is a challenge. Doing more and growing the program will demand additional resources for it to be a success.

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

This can be in the form of event planning support, consultant hours for donor engagement development, or other.

Action: Develop Alumni Engagement Plan

Describe the actions needed to achieve this objective:

Gather and organize alumni contacts; conduct alumni survey; develop engagement plan with various opportunities for alumni to get engagement; develop templates for routine touchpoints; develop annual calendar

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

Director of Resource Development, Director of Office of Communications, part-time Project Assistant

Provide a timeline for the actions:

November 2019: Select and hire Project Assistant, brainstorm goals and priorities; December 2019 through January 2020: onboard and train Project Assistant; January through March 2020: Office of Communications supervise initial work; March 2020 on: Director of Resource Development supervise additional work

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

Measures of success will be developed for the position and reported through program review as well as to the Foundation Board

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

This is the first year we will have a Project Assistant helping with Alumni Engagement. This position, funded partially through the college and partially through the Foundation, is an initial step at capacity-building. We will measure the impact of these efforts and hope that future investments can be made in personnel such that capacity is not lost and there is a long-term and sustainable plan for alumni engagement. What's more, this year the Foundation may consider alumni contact data mining services

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 to achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference, Software, Facilities, Classified Staff, Faculty, Other): n/a

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: Build out Alumni Engagement Role

Describe the actions needed to achieve this objective: Define scope of activities, work priorities, and deliverables for part time alumni engagement project assistant; train project assistant in current tools and technologies; establish method of measuring and communicating success and impact of activities.

Who will be responsible for overseeing the completion of this objective: Director of Resource Development, Director of Office of Communications, and Acting Dean of Institutional Research

Provide a timeline for the actions: November 2019: Select and hire Project Assistant, brainstorm goals and priorities; December 2019 through January 2020: onboard and train Project Assistant; January through March 2020: Office of Communications supervise initial work; March 2020 on: Director of Resource Development supervise additional work

Describe the assessment plan you will use to know if the objective was achieved and effective: Measures of success will be developed for the position and reported through program review as well as to the Foundation Board.

List resources needed to achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference, Software, Facilities, Classified Staff, Faculty, Other): This is the first year we will have a Project Assistant helping with Alumni Engagement. This position, funded partially through the college and partially through the Foundation, is an initial step at capacity-building. We will measure the impact of these efforts and hope that future investments can be made in personnel such that capacity is not lost and there is a long-term and sustainable plan for alumni engagement. What's more, this year the Foundation may consider alumni contact data mining services.

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 Krista Stellmacher

of this objective:

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

Potentially would need funds to join external community groups (e.g., Rotary Club, etc.). Maintaining current operations with existing staff capacity is a challenge. Doing more and growing the program will demand additional resources for it to be a success. This can be in the form of event planning support, consultant hours for donor engagement development, or 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 to achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference, Software, Facilities, Classified Staff, Faculty, Other):

n/a

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 to achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference, Software, Facilities, Classified Staff, Faculty, Other):	This should be able to be handled through the RD Admin Tech role.

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 to achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference, Software, Facilities, Classified Staff, Faculty, Other):	This should be able to be handled through the RD Admin Tech Position

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 to achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference, Software, Facilities, Classified Staff, Faculty, Other):	This is currently a collaboration between the Student Affairs, Web Development, Administrative Services, and Resource Development Teams. The process continues to demand a lot of capacity from our RD Director through inefficient efforts, reducing our capacity to fundraise and support a campaign. A primary gap is access to accurate balance information. Having more capacity to support Foundation Accounting, either through contract services or a Classified Position would have a dramatically positive impact.

GOAL STATUS REPORT (REQUIRED)

Action Statuses

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

Maintaining current operations with existing staff capacity is a challenge. Doing more and growing the program will demand additional resources for it to be a success. This can be in the form of event planning support, consultant hours for donor engagement development, or other.

Status for Carry Out Key Campaigns

Current Status:


In Progress

If the Current Status was marked Completed, what was the impact of the completed objective on your program:

If the Current Status was not marked Completed, what are the implications and next steps:

High priority prospects were cultivated with a high-touch approach (namely, Philip Cleary, Myra Harada, the Wong Family, Mark Linsky, and the Baxters), though a replicable and scalable approach to building a pipeline has not yet been developed. Several solicitations were developed for the first time, including: vendor outreach and follow-up, a direct-mail appeal to retirees and distinguished alumni, and support for a Classified Senate Free Throw Challenge. What's more, materials were developed for personal solicitation and social media outreach. Next steps will be: developing an intentional major donor program, a year-end appeal, a focus on lapsed donors, grantseeking, and creating an annual event.

Substantiating Evidence:

 Fundraising Plan Report (Adobe Acrobat Document)

Action: Develop Alumni Engagement Plan

Describe the actions needed to achieve this objective:

Gather and organize alumni contacts; conduct alumni survey; develop engagement plan with various opportunities for alumni to get engagement; develop templates for routine touchpoints; develop annual calendar

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

Director of Resource Development, Director of Office of Communications, part-time Project Assistant

Provide a timeline for the actions:

November 2019: Select and hire Project Assistant, brainstorm goals and priorities; December 2019 through January 2020: onboard and train Project Assistant; January through March 2020: Office of Communications supervise initial work; March 2020 on: Director of Resource Development supervise additional work

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

Measures of success will be developed for the position and reported through program review as well as to the Foundation Board

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

This is the first year we will have a Project Assistant helping with Alumni Engagement. This position, funded partially through the college and partially through the Foundation, is an initial step at capacity-building. We will measure the impact of these efforts and hope that future investments can be made in personnel such that capacity is not lost and there is a long-term and sustainable plan for alumni engagement. What's more, this year the Foundation may consider alumni contact data mining services

Status for Develop Alumni Engagement Plan

Current Status:

Not started

If the Current Status was marked Completed, what was the impact of the completed objective on your program:

If the Current Status was not marked Completed, what are the implications and next steps:

Happily, the Office has hired an Alumni Engagement Project Assistant such that work can begin. The Office of Communications Director has already gotten a head start by developing a well-documented set of strategic priorities.

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 to achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel &

n/a

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

Status for Develop Fundraising Plan

Current Status:


Completed

If the Current Status was marked Completed, what was the impact of the completed objective on your program:

While completed, this is an iterative/annual goal that will be built upon in future years. The Office successfully established a modest fundraising plan in support of the San Diego Promise and Resiliency Fund. The plan includes the following activities/solicitations: Board giving; employee giving; "borrowed event" solicitations including Tim Wise, homecoming, President's Breakfast, etc.; vendors; advisory boards; retirees; distinguished alumni; Giving Tuesday; annual Scholarship renewal; endowment establishment; and responsive opportunities. Next steps would be to build this out to include alumni engagement, grant seeking, major donors, a signature/annual event, a year-end annual appeal, and establishing engagement plans in support of moves management (including tiered giving circles), as well as brand a pool of unrestricted giving.

If the Current Status was not marked Completed, what are the implications and next steps:

Substantiating Evidence:

 Fundraising Plan Report (Adobe Acrobat Document)

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: Build out Alumni Engagement Role

Describe the actions needed to achieve this objective:

Define scope of activities, work priorities, and deliverables for part time alumni engagement project assistant; train project assistant in current tools and technologies; establish method of measuring and communicating success and impact of activities.

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

Director of Resource Development, Director of Office of Communications, and Acting Dean of Institutional Research

Provide a timeline for the actions:

November 2019: Select and hire Project Assistant, brainstorm goals and priorities; December 2019 through January 2020: onboard and train Project Assistant; January through March 2020: Office of Communications supervise initial work; March 2020 on: Director of Resource Development supervise additional work

Describe the assessment

Measures of success will be developed for the position and reported through

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

program review as well as to the Foundation Board.

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

This is the first year we will have a Project Assistant helping with Alumni Engagement. This position, funded partially through the college and partially through the Foundation, is an initial step at capacity-building. We will measure the impact of these efforts and hope that future investments can be made in personnel such that capacity is not lost and there is a long-term and sustainable plan for alumni engagement. What's more, this year the Foundation may consider alumni contact data mining services.

Status for Build out Alumni Engagement Role

Current Status:

Not started

If the Current Status was marked Completed, what was the impact of the completed objective on your program:

If the Current Status was not marked Completed, what are the implications and next steps:

Happily, the Office has hired an Alumni Engagement Project Assistant such that work can begin. The Office of Communications Director has already gotten a head start by developing a well-documented set of strategic priorities

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

Potentially would need funds to join external community groups (e.g., Rotary Club, etc.). Maintaining current operations with existing staff capacity is a challenge. Doing more and growing the program will demand additional resources for it to be a success. This can be in the form of event planning support, consultant hours for donor engagement development, or other.

Faculty, Other):

Status for Expand Role of RD Director

Current Status: In Progress

If the Current Status was marked Completed, what was the impact of the completed objective on your program:

If the Current Status was not marked Completed, what are the implications and next steps:

The Office of Resource Development hired an Administrative Technician and started the year with two part-time NANCE positions, a part time NANCE position shared with the Office of Communications, a Director, and an Admin Tech. This was a time of peak performance for the team when a number of capacity-building gains were made, including: the rollout of revised program accounts, a consolidation of all endowments with a summary of endowment criteria and calculation against earnings for scholarship balances, the establishment of solicitations and sub solicitations in Donor Perfect to correlate fundraising efforts with results, improved management of the discretionary budget, growth of Advancement/Impact Board Committee, development of selection and onboarding practices for the Board, growth of the Board, the development of countless templates and project plans for events, outreach, donor visits, innovation grant materials, fiscal processing forms, etc.; the establishment of monthly reconciliation and reporting, and a tightening of data entry in line with our fundraising plan. Since then, the team has been reduced to a Resource Development Director and RD Admin Tech, and the pace has slowed. Additionally, some workflows have not yet been successfully transitioned out of the Director's scope of work, including: reporting, administration of program accounts, committee and board support for meetings (agenda and packet prep), managing stewardship plans, and mailers/solicitations. Next steps will be to transition these responsibilities to expand the role and output of the Director, particularly in the area of major donors and to support an annual fundraising event.

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 to achieve this objective and associated costs (Supplies, Equipment, Computer Equipment, Travel & Conference, Software, Facilities, Classified Staff, Faculty, Other):	n/a

Status for Train RD Admin Tech & Transition Admin Tasks

Current Status:	In Progress
If the Current Status was marked Completed, what was the impact of the completed objective on your program:	
If the Current Status was not marked Completed, what are the implications and next steps:	Some workflows have been successfully transitioned, ensuring more consistency and continuity in our department. These include: donation data entry, event support, bimonthly receipting, monthly online donation reports, some scholarship management, and processing of check requests. Additionally, some workflows have not yet been successfully transitioned out of the Director's scope of work, including: reporting, administration of program accounts, committee and board support for meetings (agenda and packet prep), managing stewardship plans, and mailers/solicitations. Next steps will be to transition these responsibilities to expand the role and output of the Director, particularly in the area of major donors and to support an annual fundraising event.

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

This should be able to be handled through the RD Admin Tech role.

Status for Create reports and dashboards

Current Status:

Not started

If the Current Status was marked Completed, what was the impact of the completed objective on your program:

While some reports have been established for specific activities and we now have a solid set of data organized/coded by activity starting January 2019, no standard set of metrics and dashboards have been created. This should be a priority as it will help evaluate success and focus efforts and energies where most meaningful.

If the Current Status was not marked Completed, what are the implications and next steps:

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 to achieve this objective and associated costs (Supplies, Equipment, Computer

This should be able to be handled through the RD Admin Tech Position

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

Status for Update all Program Accounts

Current Status:

Completed


If the Current Status was marked Completed, what was the impact of the completed objective on your program:

While complete, this is an iterative process that will involve the continued establishment of new accounts. However, the progress made to date has allowed for:

- dramatically improved fiscal administration of funds
- a clear "menu" of options for donors to support that which inspires their philanthropy
- a replicable/scalable model of integrating foundation support into the needs of the campus

If the Current Status was not marked Completed, what are the implications and next steps:

Substantiating Evidence:

 Active Program Accounts/Donor Menu (Web Link)

Each giving option reflects a finalized program account that can be reasonably managed due to clear roles and guidelines. This establishes the infrastructure upon which greater philanthropy can be tapped into.

<https://www.sdmesa.edu/about-mesa/mesa-foundation/donate.shtml>

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 to achieve this objective and associated costs (Supplies, Equipment, Computer

This is currently a collaboration between the Student Affairs, Web Development, Administrative Services, and Resource Development Teams. The process continues to demand a lot of capacity from our RD Director through inefficient efforts, reducing our capacity to fundraise and support a campaign. A primary gap is access to

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

accurate balance information. Having more capacity to support Foundation Accounting, either through contract services or a Classified Position would have a dramatically positive impact.

Status for Updates to Scholarship Management Process

Current Status: In Progress

If the Current Status was marked Completed, what was the impact of the completed objective on your program:

If the Current Status was not marked Completed, what are the implications and next steps:

The following changes have been made:

1. From: Paper Renewal then online renewal with several spreadsheets; To: Scholarship Lead enters data directly into database; Hope: Direct input from donor to database gives us a trustworthy picture of donor intent and less; Notes: Manual configuration of Academic Works still very time consuming with room for error
- 2) From: Separate process for "Foundation Scholarships" than overall portfolio; To: One process for all scholarships with segments to tailor outreach; Hope: Streamlined process; Notes: Opportunity for more clear roles for Foundation Board
- 3) From: Separate process for "renewal" and funding; To: Streamlined process that includes funding status, balance, and link to give; Hope: Donors now have all the information they need to make decisions; we are at less risk of posting under or un-funded scholarships; Notes: Still opportunity to do more proactive outreach to potential donors

Substantiating Evidence:

[Ad Hoc Scholarship Committee Packet \(Adobe Acrobat Document\)](#)

The attached outlines process improvements and integrations across stakeholder groups.

[Scholarship Ad Hoc Committee Workplan and Recommendations \(Adobe Acrobat Document\)](#)

The attached outlines recommendations and a draft workplan to come out of the ad hoc scholarship committee.

Request Forms

CLASSIFIED POSITION, BARC AND FACULTY POSITION REQUEST

Reviewers

LIAISON'S REVIEW

Form: Administrative Services Liaison's Review 2019/20 UPDATE

MANAGER'S REVIEW

Appendix

-
- A. **2019/20 Program Review Outcomes and Assessment Section** (Form)
 - B. **2019/20 Program Review Administrative Services Analysis Section** (Form)
-

Form: "2019/20 Program Review Outcomes and Assessment Section"

Created with : Taskstream

Participating Area: Office of Resource Development

(REQUIRED) Program name

Office of Resource Development

(REQUIRED) Are you on target with your assessment schedule?

Yes, though the schedule has been modified to prioritize an assessment of student impact in 2019. The revised schedule is as follows:

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.

Year 3 – 2018-2019:

Update Administrative Unit Outcomes. Get fully trained and configure donor database. Establish documentation for scholarship portfolio management. Conduct baseline assessment for Administrative Unit Outcome 2: Board Engagement.

Year 4 – 2019-2020:

Conduct baseline assessment for Administrative Unit Outcome 1: Student Impact.

Year 5 – 2020-2021:

Conduct qualitative assessment and generate multi-year quantitative report on Administrative Unit Outcome 3: Donor Engagement and Increased Support. Conduct follow-up assessment for Administrative Unit Outcome 1: Student Impact.

Year 6 – 2021-2022:

Create and conduct assessment on Administrative Unit Outcome 4: Campus Culture of Philanthropy.

(REQUIRED) What have your assessments revealed about your courses/programs/service area/school/division/office?

Two assessments have been completed thusfar:

1) An initial baseline assessment for Administrative Unit Outcome 2: Board Engagement via 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

See attached for full results.

2) An initial baseline assessment for Administrative Unit Outcome 1: Student Impact via an Equity Analysis of Scholarships

An equity assessment was conducted by analyzing the 2019 Scholarship Cycle data, including all applicant and awardee information. Please see attached for a comprehensive summary of findings.

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

The Equity Analysis of Scholarships will be addressed through collaboration between an Ad Hoc Scholarship Committee and the Student Affairs Team. Please see attached for the committee purpose and a draft workplan and recommendations.

Please provide any other comments.

No answer specified

Form: "2019/20 Program Review Administrative Services Analysis Section"

Created with : Taskstream

Participating Area: Office of Resource Development

Administrative Service Area Name

(REQUIRED) Type your service area name.

Office of Resource Development

Part A: In this section, please analyze your service area in terms of its role in promoting equity and excellence as well as its contribution to the College's identity of being a Hispanic Serving Institution.

(REQUIRED) A1. How does your area help foster equity and excellence across the campus?

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 access, achievement gaps, unconscious bias, food and housing insecurity, and other challenges tied to socioeconomic and racial disparities. The office works alongside college leadership to understand the highest priority needs to respond to, and the best manner in which those needs can be addressed. In other words, a commitment to equity and excellence is embedded in the very mission of the RD Office and Foundation. Recent examples of this "mission in action" include:

- Management of Scholarships
- Creation of the Resiliency Fund
- Application and Fiscal Administration of the STEM Community Scholars San Diego Foundation Grant

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) A2. How does your area contribute to the College's identity of being an Hispanic Serving Institution (HSI)?

The office of Resource Development and Foundation both aim to serve Latinx students through mission activities. Highlights of program outcomes include:

- 56 Scholarship opportunities valued at \$60,245 provided to 99 Latinx students from across the scholarship portfolio
- Supporting a grant from The San Diego Foundation, which provided opportunities to 44 STEM Community Scholars, of which 22 were Latinx, and included the following outcomes:
 - 44 students exposed directly to careers within the STEM fields through experiential trips to 8 industry partners
 - 100% reported an increase in knowledge of educational information related to STEM
 - 100% reported increased awareness of local employers and career opportunities in STEM
 - 52% reported increased confidence and motivation in their ability to successfully pursue a STEM degree

(REQUIRED) A3. Have you made any changes to services or procedures in support of the topics discussed in A1 and A2? Explain.

Absolutely. We have adapted services in two primary areas: Scholarships and the Resiliency Fund.

Scholarships: The Office of Resource Development first enlisted the support of Mesa's Institutional Research team to conduct the first-ever Equity Analysis of our scholarships. From there, we presented and discussed findings at the annual Foundation Board Retreat, formed an Ad Hoc Scholarship Committee to address this among other improvements to scholarships, and worked alongside Student Affairs to implement immediate changes to the 2020 scholarship cycle, as well as identify future opportunities for equity-based changes. Immediate procedures changed:

- The default practice is to award funds directly to students rather than cut a check to Mesa College - such that students have more liquidity and those who face basic needs challenges are able to use funds for necessary expenses
- The default practice is to not require letters of reference from faculty - such that newer students and students who do not benefit from starting off with strong social capital or enjoy the inherent privileges of cultural comfort in reaching out to ask for and feel worthy of this support are not at a disadvantage
- The timeline for letters of reference has been adapted and extended to a week after the scholarship application is due - such that students have built in lead time to make requests when these are required by the donor
- We requested that the question of community service to be broadened to capture a more general definition of "giving back" and include family responsibilities - in recognition of the fact that working without pay is often a privilege for those with greater resources, we would like to capture a fuller picture of the ways in which our students contribute to their families and greater communities than traditional volunteer community service
- Assessment of all endowed scholarships - in 2019, Resource Development staff assessed all endowed scholarships to evaluate the necessary criteria and re-calibrate the requirements in the Academic Works system to ensure that we are not creating any additional barriers than what our donors intended (this resulted in the criteria for

several scholarships to be broadened to allow more students to qualify) and this renewal process was transitioned to the Board in 2020

Future changes we are hoping to implement:

- Create a means for students to search through scholarships based on what is applicable to them and those which they qualify for
- Adapt criteria of endowed scholarships that are currently impossible to award due to restrictions
- Facilitate and host conversations with donors to inform practices around criteria and evaluation such that we get to the heart of what a donor wants to fund rather than asking all students to be competitive in all areas (e.g., must rank high in all areas including academic achievement, leadership, community service, and financial need)

Resiliency Fund: Recognizing that many of our students face barriers of basic needs that are not addressed through a competitive scholarship cycle that predominantly rewards academic achievement, we researched best practices around establishing an emergency relief fund for students, facilitated several Board Committee meetings, and supported the Foundation in adopting the Resiliency Fund to provide financial support to students facing economic setbacks that put them at risk of dropping out.

(REQUIRED) A4. What data do you collect to inform your practices, policies, and procedures? How do you use this data? What have you learned from this data? If you don't collect any data, how can the Mesa Research Office support you in this area?

Scholarships: For the first time ever this year, we partnered with the office of Institutional Research to evaluate our scholarship data to conduct an equity analysis. This looked at the number and volume of scholarships awarded to different constituency groups on campus, including a breakdown by ethnicity, sex, English as a second language, unit count, and status as a first-generation college student. We analyzed the applicant pool and awardee pool in the context of the overall Mesa population.

Resiliency Fund: While we are not the ones to collect this data, we used data from the Hope Lab that revealed serious challenges that our students face in the area of basic needs.

Part B: In this section, look at the area of focus you identified in last year's program review and answer the following questions.

(REQUIRED) B1. How have you developed this focus? Are you seeing any results? What are your next steps?

1) Build Team and Establish Roles, Workflow Practices.

Who: Krista Stellmacher + RD Admin Tech + NANCE.

Why: Build capacity to grow program.

Update: The Office of Resource Development hired an Administrative Technician and started the year with two part-time NANCE positions, a part time NANCE position shared with the Office of Communications, a Director, and an Admin Tech. This was a time of peak performance for the team when a number of capacity-building gains were made, including: the rollout of revised program accounts, a consolidation of all endowments with a summary of endowment criteria and calculation against earnings for scholarship balances, the establishment of solicitations and sub solicitations in Donor Perfect to correlate fundraising efforts with results, improved management of the discretionary budget, growth of Advancement/Impact Board Committee, development of selection and onboarding practices for the Board, growth of the Board, the development of countless templates and project plans for events, outreach, donor visits, innovation grant materials, fiscal processing forms, etc.; the establishment of monthly reconciliation and reporting, and a tightening of data entry in line with our fundraising plan. Since then, the team has been reduced to a Resource Development Director and RD Admin Tech, and the pace has slowed. Additionally, some workflows have not yet been successfully transitioned out of the Director's scope of work, including: reporting, administration of program accounts, committee and board support for meetings (agenda and packet prep), managing stewardship plans, and mailers/solicitations. Next steps will be to transition these responsibilities to expand the role and output of the Director, particularly in the area of major donors and to support an annual fundraising event.

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.

Update: The Office Successfully established a modest fundraising plan in support of the San Diego Promise and Resiliency Fund. The plan includes the following activities/solicitations: Board giving; employee giving; "borrowed event" solicitations including Tim Wise, homecoming, President's Breakfast, etc.; vendors; advisory boards; retirees; distinguished alumni; Giving Tuesday; annual Scholarship renewal; endowment establishment; and responsive opportunities. Next steps would be to build this out to include alumni engagement, grant seeking, major donors, a signature/annual event, a year-end annual appeal, and establishing engagement plans in support of moves management (including tiered giving circles), as well as brand a pool of unrestricted giving.

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.

Update: Gains have been made in some areas of the donor cycle, while continued development is needed in others. **identification:** with the help of a Board member, a few priority prospects have been identified. Next steps would be to broaden and scale this effort significantly. **Cultivation:** High priority prospects were cultivated with a high-touch approach (namely, Philip Cleary, Myra Harada, the Wong Family, Mark Linsky, and the Baxters), though a replicable and scalable approach to building a pipeline has not yet been developed. To support this, next steps would be to leverage existing campus events, host "salon" events, establish a calendar of engagement opportunities, and create low-touch options such as routine updates to keep prospects connected to campus activities. **Solicitation:** several solicitations were developed for the first time, including: vendor outreach and follow-up, a direct-mail appeal to retirees and distinguished alumni, and support for a Classified Senate Free Throw Challenge. What's more, materials were developed for personal solicitation and social media outreach. Next steps will be: developing an intentional major donor program, a year-end appeal, a focus on lapsed donors, grantseeking, and creating an annual event. **Acknowledgement and Stewardship:**

A timely acknowledgement process has been established, but it is a struggle for staff to keep up with this timeline. Stewardship efforts are limited and an area of needed improvement for the purposes of moves management. At the very least, an impact report and board thank-a-thon should be supported, with quarterly updates serving as both cultivation and stewardship.

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.

Update: This is an area of dramatic improvement. As stated above, the following processes and practices have been improved: the rollout of revised program accounts, a consolidation of all endowments with a summary of endowment criteria and calculation against earnings for scholarship balances, the establishment of solicitations and sub solicitations in Donor Perfect to correlate fundraising efforts with results, improved management of the discretionary budget, growth of Advancement/Impact Board Committee, development of selection and onboarding practices for the Board, the development of countless templates and project plans for events, outreach, donor visits, innovation grant materials, fiscal processing forms, etc.; the establishment of monthly reconciliation and reporting, and a tightening of data entry in line with our fundraising plan; and dramatically improved scholarship management and renewal processes. Next steps would be to iron out in-kind donations, to continue to refine scholarship management to be more student-serving, and to support the administration of the Resiliency Fund.