

2022-23 Program Review: Office of Resource Development

<i>Program Information & Executive Summary</i>		
Prompt	Guidance	Program Response
Describe the successes and challenges your unit has faced since the last comprehensive review.		<p>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.</p> <p>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.</p> <p>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</p>

		<p>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.</p> <p>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.</p> <p>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.</p>
<p>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.</p>	<p>Optional</p>	<p>n/a</p>
<p>If applicable, describe the impact of any new resources (human, fiscal, etc.) on the unit and/or action plan implementation.</p>	<p>Optional</p>	<p>n/a</p>

Please confirm that the department has reviewed the Course Learning Outcomes listed in CurricuNet for each course and verify accuracy.	Select One	<input type="checkbox"/> Reviewed and accurate <input type="checkbox"/> Reviewed not accurate, update in progress <input type="checkbox"/> Reviewed not accurate, need support Not applicable
Data Reflection		
Prompt	Guidance	Program Response
Describe the trends you see in your program/service area's data.	<p>Instructional Data you may consider: enrollment trends, course & program learning outcomes, Institutional Learning Outcomes, course success and retention rates, degree completion, transfer, employment, labor market analysis, other data relevant to your unit's work</p> <p>Service/Admin Area Data you may consider - service usage, service access, demand for services, student service/administrative unit outcomes, types of services offered and used, headcount of services usage, trends in reason for service use, other data relevant to your unit's work</p>	<p>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.</p> <p>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.</p>

<p>Describe any equity gaps you see in these data. Are there differences and/or patterns observed by demographics (e.g. race/ethnicity, gender, age, etc.)?</p>	<p>Equity gaps refer to disparities in educational outcomes and student success metrics across race/ethnicity, socioeconomic status, gender, and other demographic traits and intersectionalities.</p>	<p>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 and 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.</p>
<p>Describe the discussion(s) that took place about the unit's learning outcomes assessment data.</p>	<p>Department Outcomes Coordinators (DOCs) facilitate a department wide discussion on learning outcomes data each year during "Outcomes Across Campus". DOC's may helpful in supporting this section.</p>	<p>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</p>

		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.
<i>Practice Reflection</i>		
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Describe current practices your unit has engaged in that you believe impact the above data trends and equity gaps.	Items to consider: new actions specifically focused on issues of equity, major curricular changes, professional learning, policy or process changes, data-informed unit dialogue, community outreach.	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 an 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?	Items to consider: legislative changes, fiscal changes, staffing changes, recruitment, hiring, and retention practices.	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.
<i>Unit Goals and Action Plans</i>		
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Unit Goals	Goals should connect to Data and Practice Reflections. Goals should be Specific, Measurable, Attainable, Relevant, and Time-bound.	<p>Goal 1: Increase fundraising activity and improve results as evidenced by: an increase from 2 to 3 major appeals each year, including an event; increased revenue, number of donors, and net new donors; increased donor satisfaction as indicated by improved net promoter score and reduced attrition.</p> <p>Goal 2: 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.</p> <p>Goal 3: Increase efficiency and strength 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 time on operations, adherence to fiscal deadlines, and increased automation of</p>

		scholarship processes.
Mesa2030 Roadmap Strategic Objective (SO) Alignment	Review Mesa2030 and the Roadmap to Mesa2030 , only link to SO's that your goal clearly and intentionally is meant to contribute to, each goal should link to 1 or more SOs	<p>Goal 1: Increase fundraising activity and improve results as evidenced by: an increase from 2 to 3 major appeals each year, including an event; increased revenue, number of donors, and net new donors; increased donor satisfaction as indicated by improved net promoter score and reduced attrition.</p> <p>SO: Completion: Support students' access to resources to mitigate the impact caused by technological and basic needs insecurity.</p> <p>SO: Design and promote programs and services that intentionally target a reduction in equity gaps in completion outcomes.</p> <p>Goal 2: 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.</p> <p>SO: Scholarship: Evaluate and improve Diversity, Equity, and Inclusion practices in classroom environments, campus activities, departments, schools, and administrative units.</p> <p>SO: Community: Build a culture of communication that is evidence based, race conscious, institutionally focused, systemically aware, and equity advancing</p> <p>SO: Develop activities, spaces, and programs that support a sense of belonging with a focus on antiracism, historically minoritized groups*, and inclusion.</p> <p>Goal 3: Increase efficiency and strength 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 time on operations, adherence to fiscal deadlines, and increased automation of scholarship processes.</p> <p>SO: Completion: Support students' access to resources to mitigate the impact caused by technological and basic needs insecurity.</p>

		SO: Design and promote programs and services that intentionally target a reduction in equity gaps in completion outcomes.
Identify specific actions your program/service area will engage in to accomplish this goal.	Examples may include: policy or practice changes; unit initiatives, curricular changes, etc.	<p>Goal 1</p> <ol style="list-style-type: none"> 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 <p>Goal 2</p> <ol style="list-style-type: none"> 1. Launch Scholarship Equity Task Force 2. Present on DEI in Philanthropy at Convocation 3. Develop DEI Action Plan <p>Goal 3</p> <ol style="list-style-type: none"> 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 repopulate all touchpoints and timeline 4. Increase number of volunteers for scholarship review
Does this Action Plan require resources	if yes, complete resource request form	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Lead Writer and Manager Information		
Lead writer Name(s)	Krista Stellmacher	
Name of Program/Unit	Office of Resource Development	
Manager Name	Krista Stellmacher	
Submission Date of Program Review Draft to Manager for feedback	6-21-23	

Submission Date of Program Review Final Draft to Office of Institutional Effectiveness	6/22/23
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