

SAN DIEGO  
MESA COLLEGE



# Program Review

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

Leadership - Office of Resource Development

### Executive Summary

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

#### 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:

#### SUCCESSSES:

##### - 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.

## Summary and Reflection

### -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.

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### 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

## Summary and Reflection

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

### 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](#)  
[OHA-San Diego Mesa College Foundation.pdf](#)  
[SDMCF Strategic Plan - 2024-2029 FINAL \(1\).pdf](#)  
[Mesa\\_Foundation\\_Survey\\_2022\\_Summary\\_PDF.pdf](#)

### Executive Summary Complete

Yes

## Data Reflection

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### 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.

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**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 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.

**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.

**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](#)

**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

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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?**

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

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### **Are there any edits or updates to the Executive Summary above?**

Yes

### **Are there any edits or updates to the Data Reflection above?**

Yes

### **Are there any edits or updates to the Practice Reflection above?**

No

## Summary and Reflection

### 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: (X - Highlight the X to Align)

- Completion - Objective 3: X
- Completion - Objective 4: X

Action Plans	Action Plan Update
<p><b>Action Plan Status:</b> Active</p> <p><b>Action Plan:</b> Goal 1 Action List:</p> <ol style="list-style-type: none"> <li>1. Plan and execute annual fundraising gala</li> <li>2. Increase grantseeking activity and tracking</li> <li>3. Increase non-ask touchpoints to donors</li> <li>4. Complete Strategic Planning for Foundation with growth goals</li> </ol> <p><b>Action Plan Cycle:</b> 2022 - 2023, 2023 - 2024, 2024 - 2025, 2025 - 2026</p>	

### 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: (X - Highlight the X to Align)

- Community - Objective 2: X
- Community - Objective 3: X
- Scholarship - Objective 2: X

## Summary and Reflection

Action Plans	Action Plan Update
<p><b>Action Plan Status:</b> Active</p> <p><b>Action Plan:</b> Goal 2 Action List</p> <ol style="list-style-type: none"> <li>1. Launch Scholarship Equity Task Force</li> <li>2. Present on DEI in Philanthropy at Convocation</li> <li>3. Develop DEI Action Plan</li> </ol> <p><b>Action Plan Cycle:</b> 2022 - 2023, 2023 - 2024, 2024 - 2025, 2025 - 2026</p>	

### 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: (X - Highlight the X to Align)

- Completion - Objective 3: X
- Completion - Objective 4: X

Action Plans	Action Plan Update
<p><b>Action Plan Status:</b> Active</p> <p><b>Action Plan:</b> Goal 3 Action List:</p> <ol style="list-style-type: none"> <li>1. Transition to new CPA/Bookkeeping firm</li> <li>2. Transition to new banking institution</li> <li>3. Embrace Texting technology to reach out to donors, scholarship leads, and reviewers and prepopulate all touchpoints and timeline</li> <li>4. Increase number of volunteers for scholarship review</li> </ol> <p><b>Action Plan Cycle:</b> 2022 - 2023, 2023 - 2024, 2024 - 2025, 2025 - 2026</p>	



**Summary and Reflection**