

# Program Review & Planning (PRP)

## COMPREHENSIVE

### PART 1: BASIC UNIT INFORMATION

Program Review is a self-study of your unit. For non-instructional program review, the definition of what is a unit varies based upon your division. A unit may be a department (e.g., Information Services, Institutional Research and Planning, Financial Aid), a program (e.g., EOPS, TRIO), or a division (Human Resource Services). The Vice Presidents for each division have identified/defined the units that will complete the review cycle.

Regardless of whether your unit is a program, department, or division, program review is about documenting the plans you have for improving Institutional Effectiveness in your area and sharing that information with the college community. Through the review of and reflection on key elements, program review and planning identifies program strengths as well as strategies necessary to improve the operation of your area. With that in mind, please answer the following questions:

<b>Date:</b>	January 27, 2020
<b>Unit Name:</b>	Foundation / Advancement
<b>Department Name:</b>	Foundation / Advancement
<b>Division Name:</b>	Office of the Superintendent/President
<b>Name of person responsible for the Program/Unit:</b>	Stacy Rungaitis
<b>Website address for your unit:</b>	Palomar.edu/foundation

Please list all participants in this Program Review:

Name	Position
Stacy Rungaitis	Executive Director, Foundation; Dir. Of Development, District
Kim Hartwell	Development Officer
Linda Moynan	Development Officer
Pauline Riley	Foundation Accountant
Foundation Board of Directors	(Volunteers)

**SECTION 1: Program/Unit Mission Statement**

What is your Program/Unit's mission statement (click here for [how to create a mission statement](#)):

The mission of the Palomar College Foundation is to assure equal access to success for all Palomar College students by inspiring individual, business and foundation philanthropic support that helps remove financial barriers and provides essential educational resources. In addition to direct student support, the Foundation's mission includes support of college and faculty initiatives that enhance the educational experience of Palomar College students.

Describe how your mission aligns with and contributes to the College's Vision and Mission.

The Foundation's mission is in direct support of the College as we work in partnership to serve students and to support faculty innovation for engaging teaching. One of the largest barriers to education is finances, so the Foundation works to remove this barrier for ALL students so they can focus on their educational journey.

**SECTION 2: Program/Unit Description****Staffing**

<u>Full-time Staff</u>		<u>Part-time Staff</u>	
Total Number of Full-time Staff	4	Total Number of Permanent Part-time Staff	0
Number of Classified Staff	3	FTE of Part-time Staff (2X19 hr/wk = .95)	0
Number of CAST Staff	0	FTEF of Part-time Faculty	0
Number of Administrators	1		
Number of Full-time Faculty	0		

Describe additional temporary hourly or contract staff support this unit and/or department? (Include FWS/District Student Worker/Veteran Student Worker)

\*Foundation PAID Staff: 3 PT (Short-term Temporary) Professional Experts, Contract Grant Writer

As part of this PRP cycle, Human Resource Services has sent organizational charts to all non-instructional units. Please review the charts and make any needed changes. Attach a copy of the chart when you are submitting your review or provide the link to your organizational chart if it is online.

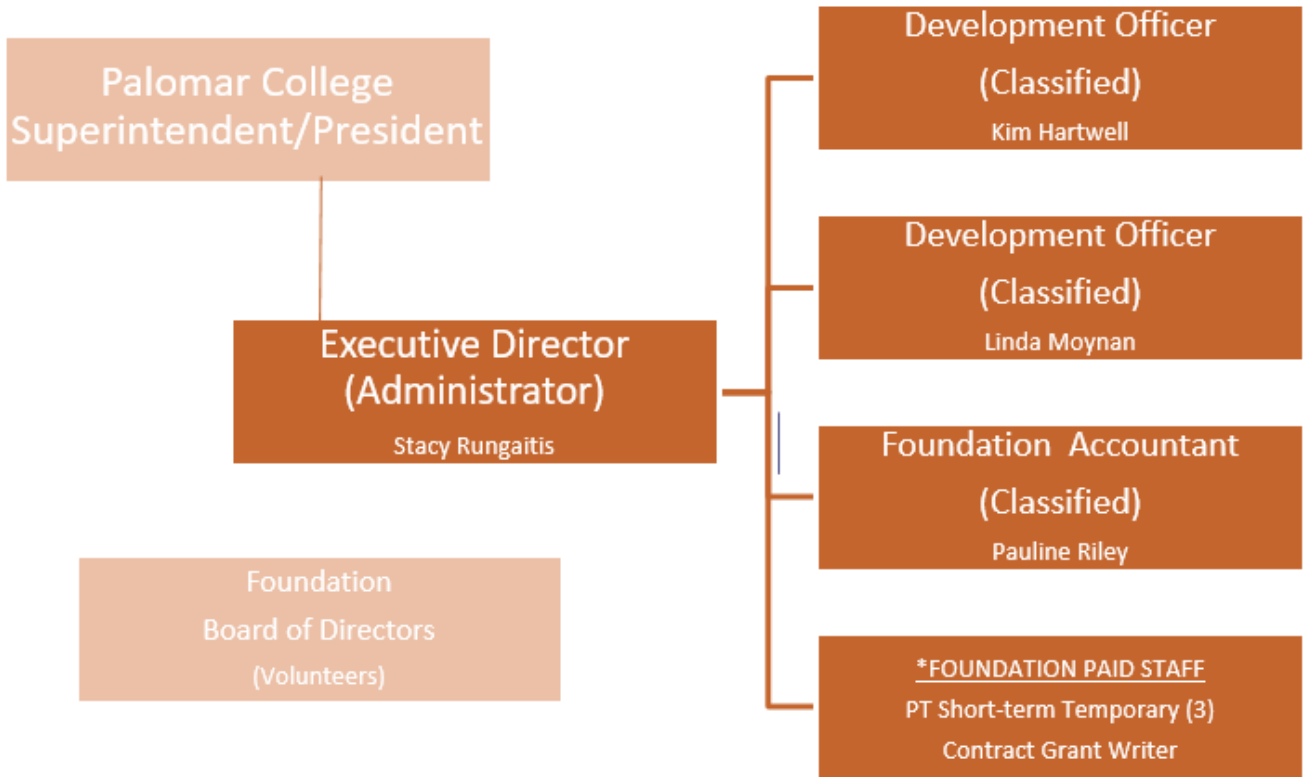
OR

If you cannot create an organizational chart, or did not receive one from Human Resource Services, list the positions in your unit showing reporting relationships (e.g., Manager Facilities with the following direct reports, Supervisor Position A, Supervisor Position B, Supervisor Position C; Supervisor Position A with direct reports, Position A, Position B, Position C)

How will you submit your organizational chart?

☒ Upload document    ☐ Provide web link    ☐ Describe organizational structure

# Foundation Team (Staff)



**Program/Unit Description**

Who utilizes your services?
Students, faculty, staff, community, alumni

What services does your program/unit provide (Describe your program/unit)?
We provide funding to students, faculty and staff to achieve the mission of the College. Our core programs include scholarships, textbook assistance and emergency grants for students in addition to innovation grants for faculty. We also raise philanthropic funds to support other needs of the District. This includes programs such as Palomar Promise, CALM, Veterans, First Responders, DRC, STEM, Transitions, Transportation, Food Pantry/Housing/Basic Needs, Capital Equipment and other College Priorities.

## COMPREHENSIVE PART 2: PROGRAM/UNIT ASSESSMENT

### SECTION 1: Service Area Outcomes and Assessment

#### GOT SERVICE AREA OUTCOMES?

**Outcomes are statements written in support of student learning to show direct support (instruction) or indirect support (services) provided on campus. Assessment is the way we measure how well we are achieving our outcomes.**

**For non-instructional areas, outcomes are called Service Area Outcomes (SAO).**

#### So, what is an SAO?

A Service Area Outcome (SAO) is a statement about what a client will experience, receive, or know as a result of a given service. Clients can be students, faculty, staff, or community members.

As part of our three-year planning and review cycles, all non-instructional units are asked to:

- identify at least two SAOs,
- develop a plan and assess their SAOs,
- reflect on the results,
- and take action, as necessary.

Palomar has adopted TracDat as our official repository for SLO and SAO Assessment information.

#### **Review and/or define your SAOs and assessment plans and ensure they are entered in TracDat by:**

- 1) Login to Nuventive Improve (TracDat) <https://www2.palomar.edu/pages/sloresources/2015/08/10/tracdat/>. Your Palomar username and password is your login.
- 2) Update or add your SAOs and assessment plans.

#### **NEED HELP?**

##### **TracDat:**

- 1) If you need help with anything TracDat related such as login, unit identification, entering SAO info, contact Marti Snyder at [msnyder2@palomar.edu](mailto:msnyder2@palomar.edu).
- 2) Check out this video on how to enter SAOs in TracDat: <https://youtu.be/b1sRa68wm4c>

##### **Defining and Assessing SAOs:**

Not sure if your SAOs make the grade? Need some help writing an SAO? Not sure about how to assess your SAOs?

1. [Hartnell's SAO Guide](#) is a nice resource! Thank you Hartnell!
2. Contact Michelle Barton at [mbarton@palomar.edu](mailto:mbarton@palomar.edu). We have a resource support team to help.
3. The SAO template at the end of this document is a useful template for defining an SAO and assessment plan. It is modeled off what we enter in TracDat.

<b>Are all of your unit's SAOs and assessment plans entered in TracDat?</b>	<b>YES X</b>	<b>NO</b>
<b>If NO, describe why and identify a data by which they will be entered.</b>		

<b>For each SAO in TracDat, summarize what you learned from the assessment and what improvements you have implemented or plan to implement as a result of your SAO assessments.</b>
1) 90% of Revenue Goal Raised – Inactive/Sunset as it is no longer relevant to how we set goals.
2)
3)
4)

## SECTION 2: Other Assessment Data

**List all other quantitative and/or qualitative measures you use to track, monitor, and/or evaluate the effectiveness of your program/Unit:**

### **Quantitative Data**

	Values				
Measure	2015-16	2016-17	2017-18	2018-19	Definition/Description of Measure
Revenue for Student Scholarships	\$479,131	\$304,904	\$242,996	\$618,527	Annually raise a min. of \$300,000
President's Associate Memberships	52	40	41	47	Maintain at least 45 members annually
Key District Initiatives – Support Through Outside Grants	\$102,981	\$211,360	\$73,500	\$171,453	Raise a min. of \$75,000 annually
Faculty Innovation Grants	\$61,453	\$69,112	\$57,584	\$57,644	Award at least \$40,000 annually

**Reflect on your quantitative data and summarize your findings or interpretations.**

Although there has been an increase in overall funds raised, the Foundation's core fundraising initiatives have remained consistent. Intentional effort, focus on expansion of any of these areas will allow for growth in the future.

### **Qualitative Data**

**Describe any qualitative measures you use and summarize the results.**

Donor stewardship is key to renewing donors as well as expanding our efforts. The Foundation has increased

engagement for President's Associates by adding events specific to this group on a quarterly basis. An increase in the type of faculty grants offered as well as the items we've funded through outside grants have supported many key initiatives for the District.

**What improvements have you implemented or plan to implement as a result of your assessment of quantitative and/or qualitative data described above.**

The staff will have specific goals in their annual work plans on renewals of donations as well as seeking new dollars.

### **SECTION 3: Achievements and Other Relevant Information**

**Describe your program's achievements or this past year. Where possible, describe how these achievements are related to our students and their success!**

Funding our core programs is essential for student success through scholarships, textbook assistance and emergency grants. Every day, we help students stay in school.

**Describe any recent changes in legislation, policies, procedures, processes, and/or technology (software and hardware) that have impacted or will impact your program/unit? What effect will these changes have on your program/unit?**

We work closely with Student Services regarding the awarding of student scholarships. Recently, all of the scholarship programs which were identified to be awarded to a student in a protected class needed to be addressed. Since most are donor directed, we had to contact each donor impacted and review the qualifications for the scholarship. In addition, we had to make the necessary changes to move the program forward.

**In addition to (or in response to) the changes listed above, what board policies, procedures, and processes need to be updated, created, or deleted?**

The material donations policy should be reviewed by Fiscal and Administrative Services along with the Foundation.

**COMPREHENSIVE****PART 3: PROGRAM/UNIT EVALUATION AND THREE-YEAR PLANNING**

Program Evaluation and Planning is completed in two steps.

**Section 1: Overall Evaluation of Program**

Reflect on your program/unit, the results of your assessments in Part 2 above, and your vision for the future. Then, working together answer the following questions. Summarize your answers in the grid below.

1. What are our greatest strengths?
2. What are our best opportunities?
3. What is our preferred future, what do we aspire to do?
4. What are the measurable results that will tell us we've achieved that vision of the future?

**Section 2: Establish Goals and Strategies for the Next Three Years**

Once you have completed your overall evaluation, identify a set of goals and strategies for accomplishing your goals for this upcoming three-year planning cycle. Use the template in Section 2 below to document your goals, strategies, and timelines for completion. Goals should be Specific, Measurable, Attainable, Relevant, and Time –Specific (SMART). Following the goal template below will help you create SMART goals!

**SECTION 1: Overall Evaluation of Program**

**1. Discuss your Program's/Unit's Strengths, Opportunities, Aspirations, and Results (SOAR) and summarize your discussion below.**

<b>Strengths:</b>	Supporting students, strong mission, knowledgeable staff, and a diverse board of directors
<b>Opportunities:</b>	Increase funding through naming opportunities, alumni/affinity groups
<b>Aspirations:</b>	Grow net assets - move the needle
<b>Results:</b>	Raising more money than average with focused efforts to ensure we fulfill our mission!

**SECTION 2: Progress on Prior Goals**

**List current or prior goals your program/unit has been working on and provide an update by placing an "X" in the appropriate status box.**

<b>Goal</b>	<b>Completed</b>	<b>Ongoing</b>	<b>No longer a goal</b>
Raise \$2M in one fiscal year	X	X	
Pivot our event strategy by no longer doing a gala but instead a 5K and Community Showcase	X	X	
Increase net assets to \$10M		X	

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Add any comments related to your work on prior goals, if needed (e.g., successes, challenges, reasons for eliminating a goal).

### SECTION 3: Establish Goals and Strategies for the Next Three Years

#### 1. New Goals: Please list all goals for this three-year planning cycle:

Goal #1	
Goal	Donor Database – Transition to Donor View from Raiser's Edge (Eliminate shadow systems)
Strategies for implementation	Purchase system, transition data, eliminate shadow systems, increase efficiency and accuracy
Timeline for implementation	January 2020-December 2020 + Clean up on-going
Outcome(s) expected (qualitative/quantitative)	Increase revenue to support mission with increased efficiency, accuracy of data, lower cost system
How does this goal align with your unit's mission statement?	Increase revenue in order to support our mission
How does this goals align with the College's <a href="#">Strategic Plan 2022</a> ?	Student success and teaching
Goal #2	
Goal	Enhance Donor Communication, Stewardship Activities
Strategies for implementation	Update website, social media, create collateral, celebrate donors, create quarterly e-news
Timeline for implementation	Summer 2020 +
Outcome(s) expected (qualitative/quantitative)	Increase engagement of donors to increase revenue
How does this goal align with your unit's mission statement?	Increase revenue in order to support our mission
How does this goal align with the College's <a href="#">Strategic Plan</a> ?	Student success and teaching
Goal #3	
Goal	Donor Prospecting for Specific New Engagement
Strategies for implementation	Identify top five alumni, business leaders who need to know what we do and engage them – ask for their involvement
Timeline for implementation	Summer 2020 +



**COMPREHENSIVE PROGRAM REVIEW AND PLANNING: Non-Instructional Programs**

<b>Outcome(s) expected (qualitative/quantitative)</b>	Increase engagement of local community members in the life of the institution
<b>How does this goal align with your unit's mission statement?</b>	Increase revenue in order to support our mission
<b>How does this goals align with the College's <a href="#">Strategic Plan 2022</a>?</b>	Student success and teaching
<b>Goal #4</b>	
<b>Goal</b>	Create Multi-Year Alumni Association & Affinity Group Plan (Adding PT Foundation Paid Staff Member)
<b>Strategies for implementation</b>	Create three-year plan to engage alumni and affinity groups with increased involvement each year
<b>Timeline for implementation</b>	Summer 2020 +
<b>Outcome(s) expected (qualitative/quantitative)</b>	Create more champions of the cause in the community; increase donations
<b>How does this goal align with your unit's mission statement?</b>	Increase revenue in order to support our mission
<b>How does this goals align with the College's <a href="#">Strategic Plan 2022</a>?</b>	Student success and teaching

<b>How do your goals align with the College's value of equity and diversity?</b>
Everything we do is in support of equal access to education.

<b>The Strategic Plan 2022 includes the College's Vision for Success (VfS) outcomes. Review the VfS goals and reflect on how your unit supports these outcomes. Identify one strategy your unit will implement to help the college meet these outcomes. Click here to access <a href="#">Strategic Plan 2022</a>.</b>
Increase certificates and degrees by removing financial barriers for our students.

## COMPREHENSIVE PART 4: RESOURCES

Reflect upon the three year plan you created above, your current operations, and any upcoming factors (retirements, changes in legislation, and changes in policies or procedures). How will you allocate resources to implement your plan? Describe additional resources needed to improve the effectiveness of your unit/program. All resource requests must be aligned with the College's [Strategic Plan 2022](#).

### SECTION 1: Reallocation or Reassignment of Resources

Summarize any reallocation/re-organization of resources you are making based upon your three-year plan, your current operations, and any upcoming factors in legislation. Describe the impact of the reallocation of resources to your unit.

NA

### SECTION 2: Need for Additional Resources

#### STAFFING

If you are requesting STAFF, please fully complete this section. If not, you can skip to the next resource section.

Title	Three Year Plan Goal	<a href="#">Strategic Plan 2022 Goal/ Obj.</a>	New / Vacant / Modified / Temporary	Describe Need:
1)				
2)				
3)				

#### TECHNOLOGY

If you are requesting TECHNOLOGY, please fully complete this section. If not, skip to the next resource section.

Resource	Unit's Three Year Plan Goal	<a href="#">Strategic Plan 2022 Goal/ Obj.</a>	Cost (\$\$\$)	Describe need and identify if the technology need will require: 1) extra wireless access, 2) integration with existing technology (hardware and software such as PeopleSoft), and/or 3) operational maintenance and support.	For each item, assign a PRIORITY number (1 = most important, 2= next important, and so on) across <u>ALL</u> of your Technology, Equipment, or Other Resource Requests.
1)					
2)					
3)					

#### EQUIPMENT (Other than technology)

If you are requesting EQUIPMENT, please fully complete this section. If not, skip to the next section.

**COMPREHENSIVE PROGRAM REVIEW AND PLANNING: Non-Instructional Programs**

<b>Resource</b>	<b>Three Year Plan Goal</b>	<a href="#"><u>Strategic Plan 2022 Goal/ Obj.</u></a>	<b>Cost (\$\$\$)</b>	<b>Describe need:</b>	<b>For each item, assign a PRIORITY number (1 = most important, 2= next important, and so on) across <u>ALL</u> of your Technology, Equipment, or Other Resource Requests</b>
1)					
2)					
3)					

**OTHER RESOURCES**

**If you are requesting OTHER RESOURCES not described above, please fully complete this section. If not, CHEERS!!! You are DONE!!!**

<b>Resource</b>	<b>Three Year Plan Goal</b>	<a href="#"><u>Strategic Plan 2022 Goal/ Obj.</u></a>	<b>Cost (\$\$\$)</b>	<b>Describe need:</b>	<b>For each item, assign a PRIORITY number (1 = most important, 2= next important, and so on) across <u>ALL</u> of your Technology, Equipment, or Other Resource Requests</b>
1)					
2)					
3)					

**COMPREHENSIVE**  
**PART 5: FEEDBACK AND FOLLOW-UP**

Once your Program/Unit PRP is completed, your division or planning council should review and discuss based on your Vice President's planning process. This area is intended for summary feedback and recommendations from the divisional review.

**Confirmation of Review by Division / Planning Council**

**Person/Group/Council  
Who Reviewed PRP**

**Date**

**Feedback**

**1. Strengths and successes of the program/unit as evidenced by the data, analysis, and assessments:**

**2. Areas of Concern, if any:**

**3. Recommendations for improvement:**

SERVICE AREA OUTCOMES TEMPLATE

Date Identified or Last Reviewed	Description of SAO (What is your SAO?)	Assessment Method (How will/do you measure or assess it?)	Criterion (How will/do you know if you met the outcome?)	Date of Assessment	Date of Next Assessment
1)					
2)					
3)					
4)					