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2020-2021 ANNUAL REVIEW

OVERVIEW OF PROGRAM REVIEW AND PLANNING FOR NON-INSTRUCTIONAL PROGRAMS

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.

The Annual Update is designed to help you track progress on your three-year plan. It allows for updates to your plan based on:

- 1) Updates to Service Area Outcomes assessment cycle or unit data;
- 2) new events, legislation, or processes that affect your unit's ability to meet your mission; and
- 3) a review of progress on your three-year plan's goals.

BASIC UNIT INFORMATION

Program/Unit Name
Advancement / Foundation

Department Name
Advancement / Foundation

Division Name
President's Office

Name of Person responsible for the Program/Unit
Stacy Rungaitis

Website address(es) for your program(s)/unit(s)

Webpage URL 1

Unit webpage
<https://www2.palomar.edu/pages/foundation/>

Please list all participants and their respective titles in this Program Review

Participant	Title
Stacy Rungaitis	Executive Director, Foundation; Director of Development

STAFFING AND SERVICE UPDATES

Staffing

Use the link provided to help answer the staffing questions below.

Link: [Permanent Employees Staff Count](#)

This form requires a login and password to access. Please use your Palomar email and password to log in.

Full-Time Staff

Total Number of Full-time Staff

3.00

Number of Classified Staff

2.00

Number of CAST Staff

Number of Administrators

1.00

Number of Full-time Faculty

Part-Time Staff

Total Number of Permanent Part-time Staff

FTE of Part-time Staff (2x19 hr/wk=.95)

FTEF of Part-time Faculty

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

Contract grant writer - Paid by Foundation

Have you experienced any changes in staff this past year? If so, please describe how the changes have impacted your operations.

Significant changes/reduction in staffing have occurred in the past year. The FT Foundation Accountant (Classified Staff) is reorganized/change supervisory role to fiscal services. Three PT hourly employees/professional experts (paid by the Foundation) roles have been eliminated. One PT Federal Work Study position was eliminated. COVID-19 shifted our needs/activities. However, the impact is unsustainable for the Foundation team to produce at the required level without support from PT/professional expert roles moving forward. (Paid by the Foundation.) In addition, the FT Foundation Accountant role once retirement in 2021, position should be reorganized back to Foundation with updated job description to cover accounting and operations.

Program/Unit Description

Have the services your unit performs change in any way over the past year?

The demand for Foundation funding from students, specifically emergency grants substantially increased due to COVID-19. The Foundation's early response with securing funding to offer laptop computers and response to emergency funding needs has allowed (to date) for 26 times the annual amount of emergency grants to be awarded in addition to over 1000 laptop computer distributed. The Foundation was instrumental to keeping students in school during the transition to remote learning.

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PROGRAM/UNIT ASSESSMENT

SERVICE AREA OUTCOMES UPDATE

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 Nuventive Improve (previously named 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 Nuventive Improve by:

1) Login to Nuventive Improve (previously TracDat) <https://www2.palomar.edu/pages/sloresources/2015/08/10/tracdat/>. Your Palomar username and password is your login.

2) Check your SAOs for **currency** and **sunset** any SAOs if you no longer plan to assess them.

3) Revise or edit your current SAOs by revising their wording and/or updating the assessment and assessment results.

NEED HELP?

Nuventive Improve:

- 1) If you need help with anything Nuventive Improve related such as login, unit identification, entering SAO info, contact Marti Snyder at msnyder2@palomar.edu.
- 2) Check out this video on how to enter SAOs in Nuventive Improve: <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. We have a resource support team to help.

A template for entering SAOs can be found on the [IR&Ps Non-instructional Program Review and Planning website](#)

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)					

Are all of your unit's SAOs and assessment plans **UPDATED** and **ENTERED** in Nuventive Improve?
Yes

SAOs Summaries / Reflection

If you have completed any SAO assessments over the past year, summarize what you learned from the assessment and what improvements you have implemented or plan to implement as a result of your SAO assessments. If you have not completed SAO assessments, document why (e.g., SAO was assessed last year).

SAOs

SAO 1

SAO Title

Scholarship Revenue

Assessment Status

Assessed

SAO Summary and Reflection

The Palomar College Foundation will raise at least \$300,000 annual in support of student scholarships. The Foundation operates on a calendar year (January-December). Through the end of September, the Foundation has raised \$549,000 in scholarship funding. A one-time endowment donation was secured in Spring of 2020 allowing for a significant increase in overall scholarship funds. The endowment will be a significant benefit (as is the annual scholarships) to students year-over-year.

SAO 2

SAO Title

President's Associate Memberships

Assessment Status

Assessed

SAO Summary and Reflection

The Palomar College Foundation will engage at least 45 members annually in the President's Associates. The Foundation has seen a significant decrease in PA member renewals as well as new membership with currently only 25 active members. COVID-19 and the end of the Bond measure have contributed to corporations ability to continue membership. It has been challenging to meaningfully engage individuals when not able to meet in person. A transition in leadership/PR issues with the former President cause some members to not renew. In addition, the loss of PT/professional experts cause FT staff to shift focus of work. PA stewardship was not done at the level it should be done and needs to be done in order to ensure continued support of these important constituents. The Foundation team is addressing the staffing along with revitalizing the renewal process in order to achieve this important goal moving forward. The PA provide unrestricted funding so support not only operational budget of the Foundation but the textbook assistance program, scholarships and faculty innovation grants. It is essential to raise/increase this bucket of funds.

SAO 3

SAO Title

Outside Grant Revenue

Assessment Status

Assessed

SAO Summary and Reflection

The Palomar College Foundation will secure at least \$50,000 annually in outside grant revenue to support various key initiatives of the District. As of September, the Foundation has secured \$45,000 in outside grant revenue in 2020. With several pending requests, this goal will be achieved.

SAO 4

SAO Title

Faculty Innovation Grants

Assessment Status

Assessed

SAO Summary and Reflection

The Palomar College Foundation will award at least \$40,000 in faculty innovation grants annually.

The Foundation has awarded \$54,000 in faculty innovation grants. Programs impacted include Transitions, CALM, Performing Arts, Bravura, Cybersecurity Program, and AAWCC conference.

SAO 5**SAO Title**

Emergency Grants (New in Fall 2020)

Assessment Status

Not assessed

Next planned assessment

Fall 2021

OTHER ASSESSMENT DATA

Review the Quantitative and Qualitative Data from your comprehensive review. If there are updates please describe them below.

Quantitative: 2020 overall fundraising stretch goal is \$2,000,000. As of September 30 at \$1,894,268. With what is on the horizon, the Foundation will again exceed a \$2M revenue goal! Qualitative: more emphasis must be placed on donor stewardship. This is simply a staff time issue with the reduction of PT/professional experts.

ACHIEVEMENTS AND OTHER RELEVANT INFORMATION

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

- Overall fundraising stretch goal will be reached raising over \$2M!
- The Foundation's core programs, including scholarships, textbook assistance and emergency grant exceeded revenue and kept thousands of students in school.
- Quick response to COVID-19 resulted within five days of launching a major gift campaign, securing funding, securing a vendor and distributing laptops to students before campus closed.
- Over 1,000 laptops distributed as of 10/1/2020 and \$130,000 to 987 students in emergency grants!
- Administered over 400 individual scholarships to students.
- Over \$50,000 in textbook assistance funding was distributed to students.
- Faculty innovation grants provided direct resources to students including CALM, Cybersecurity, Transitions.

Provide an update on 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?

The Foundation transitioned to a new donor database (CRM) in January. While the process was intense, the new system is user-friendly and intuitive to our needs. It also is a more robust, forward thinking system. We need to devote a PT/professional expert to learning all of the functionality so we can better utilize.

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

- Material Donations Policy - needs to be updated.

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PROGRESS ON GOALS

Review the goals listed on your comprehensive review and summarize progress you have made on the strategies for implementation. If your unit has experienced challenges implementing the goals, describe those challenges.

Click on "+Add Goal" below for each additional goal.

Goals

Goal 1

Goal

Raise \$2M in one fiscal year

Choice

In progress

Describe Progress

Annual stretch goal for the Foundation.

Describe Challenges

Reduction in PT/professional expert staffing (paid for by the Foundation) - unsustainable work load for FT staff.

Describe Outcomes (if any)

Exceeded \$2M goal in 2018 and will in 2020!

Goal 2

Goal

Pivot event strategy by no longer doing a gala but instead a 5K and Community Showcase

Choice

In progress

Describe Progress

Now an annual Foundation strategy.

Describe Challenges

Two events now close together with reduced staffing makes this challenging. The physical events vs. virtual events due to COVID-19 while different, do still require a substantial amount of effort. Also, sponsors are not as excited about supporting virtual events vs. in-person events.

Describe Outcomes (if any)

Successful 5K and Community Showcase as annual events 2018, 2019 and 2020/2021.

Goal 3

Goal

Increase net assets to \$10M

Choice

Completed

Describe Progress

This has been a major goal of the Foundation for years!

Describe Challenges

It's difficult to move the needle on net assets!

Describe Outcomes (if any)

Good market strategy along with new endowment funds coming to the Foundation pushed over the \$10M in 2020.

Goal 4

Goal

Create and implement a strategic community engagement plan for Palomar College. Two key objectives include the establishment of Advisory Councils for each of the Education Centers as auxiliary groups of the Foundation and intentionally increase College's involvement in local Chambers

Choice

In progress

Describe Progress

Strategic Community Engagement Plan has been developed
Working with VPI/Education Center Directors to launch advisory councils in December 2020 with quarterly meetings in 2021
Advisory Council membership description developed
Kick-off meeting invitation to membership sent

Describe Challenges

Multiple activities in the plan to implement short and long term with no additional staff support.
Training of internal staff to ensure proper representation/engagement with the community.
Ensuring commitment of staff to serve at board level on chambers

Describe Outcomes (if any)

Increasing the profile of Palomar College in the community!
Community members excited to be connected to Palomar College in a meaningful way

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.

Strengthen and grow the College's community connections and partnerships.

Increase students retention and persistence to graduation by removing financial barriers to education!

Describe any changes to your goals or three-year plan as a result of this annual update.

Due to COVID-19, an emphasis on emergency grant funding (due to the demand) has increased (26 times to date). This will remain a goal/emphasis in 2021.

New institutional commitment to community engagement - create and implement strategic community engagement plan!

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RESOURCES

Congratulations! You are nearing completion. In this section, you will consider the resources you need to implement your three-year program review plan and/or address any findings from your assessment of your discipline.

The section is organized into the following four parts:

PART 1: Staffing Needs (Faculty and Additional Staff)

PART 2: Budget Review

PART 3: Technology and Facilities Needs

PART 4: One Time Request for Other Needs (NonTechnology Equipment, Supplies, Operating Expenses, Travel)

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) that will impact your unit. 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.**

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

PART 1: STAFFING NEEDS

Are you requesting new Classified, CAST, or AA positions?

Yes

If you are requesting STAFF, please fully complete this section. If not, you can skip to the next resource section. Click "+Add Staff, CAST, AA request" below for each additional request.

When considering the funds required for a position, consult the HR website for position salary schedule and the [Benefits Worksheet](#) for additional costs related to benefits for the position.

REQUEST FOR ADDITIONAL CLASSIFIED, CAST, AA

Staff, CAST, AA request 1

Title of position

* NOT NEW - REORG/RESTRUCTURE UPON RETIREMENT: Foundation Accountant / Operations Specialist

Is this request for a full-time or part-time position?

Full Time

How does the position fill a critical need for current, future, or critical operations? e.g. accreditation, health and safety, regulatory, legal mandates, institutional priorities, program trend analyses of growth/stability.

Foundation Accountant (recently reorg to supervisory role in fiscal services) plans to retire June 30, 2021. Upon the retirement, it is requested this position returns to Foundation and job description is updated/restructured to including the accounting/bookkeeping function along with operational / donor stewardship support so ED and development officers can focus on their job of fundraising/increasing revenue.

Does the position assist in establishing more efficient District Operations through either of the following: reorganization/restructuring OR use of technology?

The restructuring of the position will allow for technology efficiencies with converting the current accounting system to QuickBooks which coordinates with the donor database and allows for efficiency in the work. In addition, this will allow the position to be more robust in duties.

Is there funding that can help support the position outside of general funds?

No

Describe how this position helps implement or support your three-year PRP plan.

NOT NEW - JUST REORG/RESTRUCTURE. With a accountant/bookkeeper who also focuses on operational and stewardship support to the fundraisers, more revenue will be generated! This critical work will free up the Executive Director and Development Officers to focus on the main thing - bringing in funding!

Strategic Plan 2022 Objective

3:4

5:2

If the position is not approved, what is your plan?

NOT A NEW POSITION - REQUEST TO BE REORGANIZED BACK TO THE FOUNDATION/RESTRUCTURED TO SERVE THE DISTRICT FULLY. The Foundation can not be (legally) without an accountant. With no operational budget from the district other than staffing, the Foundation would have to look to alternative sources such as grant revenue of some type to cover this position.

PART 2: BUDGET REVIEW

Review your Budget/Expenditure reports for 2018, 2019, 2020. Consider your three-year PRP plan.

Click on the link below to access directions to the *Available Budget Report* to complete this section.

[How to Request the Available Budget Report](#)

Reflecting on your three-year PRP plan, are there any budget considerations you would like your dean/supervisor to be aware of for the upcoming year?

No

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NOTE: PARTS 3 and 4 – TECHNOLOGY, FACILITIES AND OTHER NEEDS

This year the College is implementing two new processes related to resource needs coming from the PRP process.

1. One-Time Fund Requests. The college is implementing a process for prioritizing and allocating funds for one-time needs/requests tied to Program Review and Planning. Prioritization will take place through participatory governance in planning councils and the Budget Committee. Then, a recommendation will be made to Exec for funding of request utilizing various funding sources.

For more information about funding sources available, see [IELM BLOCK GRANT, LOTTERY, PERKINS AND STRONG WORKFORCE GUIDELINES](#) (on the left menu of the web page).

Consider submitting one-time requests only if you have verified that you cannot fund the request using your general discretionary funds or other funds.

2. Technology and Facilities Review. From now on, ALL requests for technology will go through an institutional process. If you request technology here, you will see a description of the process below.

PART 3: TECHNOLOGY

Will you be requesting any technology (hardware/software) this upcoming year?

No

Note about technology requests:

All technology requests will now go through a review process before prioritization.

- *Your director will send you a Technology Request Checklist (aka Technology Proposal Analysis Checklist).*
 - *You must complete this checklist and return it to your director no later than 10/30/2020.*
 - *Once the director approves the form and the request, the director will send the document to the Technology Review Committee to determine IS resources needed, any integration issues, and/or potential overlap with existing technology.*
 - *The results of the review will be sent to the director with feedback.*
 - *The director will determine whether or not the request moves forward for prioritization and/or implementation.*
 - *Requests for one-time funding will move forward for prioritization.*
 - *Requests that use funding from your department budget may move forward for purchase.*

PART 3: FACILITIES NEEDS

Do you have resource needs that require physical space or modification to physical space?

No

PART 4: ONE TIME NEEDS

For more information about funding sources available, see [IELM BLOCK GRANT, LOTTERY, PERKINS AND STRONG WORKFORCE GUIDELINES](#) (on the left menu of the web page under "Instructional Funding Sources").

Do you have one-time requests for other items (e.g., Non-Technology Equipment, Supplies, Operating Expenses, Travel) that your budget or other funding sources will NOT cover?

No

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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:

Jack S. Kahn Ph.D.

Date Reviewed

11/16/2020

FEEDBACK

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

There are so many strengths associated with this review and unit. the report itself is extremely well organized, data-based, and future focused. The Foundation has provided tremendous support to the institution through creative fund-raising projects to overall leadership in positive messaging for the internal and external community. Even given the COVID environment, the foundation still manages to make progress, retool and pivot for a new environment. i think new strategic goals will assist tremendously in reaching overall goals and growth.

Areas of Concern, if any:

None.

Recommendations for improvement:

None.

Enter your email address to receive a copy of the PRP to keep for your records.

I confirm that the Program Review is complete and ready to be submitted.

Yes

Vice President Review

Strengths and successes of of the discipline as evidenced by the data and analysis:

Areas of concern, if any:

Recommendations for improvement:

VP Name:

Signature Date: