Status: **Read**   Status: **Submitted**

Entry #: 36

Date Submitted: 1/19/2022 2:51 PM

2021-2022 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 review of and reflection on key program elements, Program Review and Planning identifies program strengths and 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.**

The College also uses Program Review and Planning as the conduit to request resources (human, technology, facilities and funding) to further help improve and support programs.

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://www.palomar.edu/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	**Part-Time Staff**
Total Number of Full-time Staff 4.00	**Total Number of Permanent Part-time Staff**
Number of Classified Staff 3.00	**FTE of Part-time Staff (2x19 hr/wk=.95)**
Number of CAST Staff	**FTEF of Part-time Faculty**
Number of Administrators 1.00	
Number of Full-time Faculty	

Describe additional temporary hourly or contract staff who support this unit and/or department. (Include FWS/District Student Worker/Veteran Student Worker)
The Foundation pays for additional staff due to the robust development plan and fundraising goals. The Foundation supports one PT Database & Administrative Coordinator; one contract grant writer.

Have you experienced any changes in staff this past year? If so, please describe how the changes have impacted your operations.
The Foundation Accountant retired on 6/30/2021. This position has not been filled at this time. A Part-time short-term professional expert is filling the accounting function. The job description has been updated and is with Human Resources for review in order to move forward with posting/hiring.

We anticipate one of the two development officers retiring in June of 2022, taking 20 years of donor relationships with her. We are transitioning the other DO to one of her programs to help with the transition.

These changes have an impact on the entire team and of course, the Executive Director as I need to pick up any work not being done by the staff.

Program/Unit Description

Have the services your unit performs changed in any way over the past year?
The demand for Foundation funding from students, specifically emergency grants increased due to the COVID-19 pandemic. The Foundation continues to obtain funds and distribute computers and emergency grants in order to keep students in school.

Reminder: Data does not autosave. Save this content before moving to the next section or closing form.

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 (SAOs).

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 doing the following:

1) Log in to Nuventive Improve (previously TracDat) https://idmpg.palomar.edu/_layouts /PG/login.aspx?ReturnUrl=%2Fsso%2Fdefault.aspx. Your Palomar username and password is your login.

2) Check your SAOs for **currency**. SAOs should be assessed at least once every three years. **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, if appropriate.

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

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

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
Annual Scholarship Support - $300,000 annually in support of student scholarships

Assessment Status
Assessed

SAO Summary and Reflection
The Foundation operates on a calendar year (January-December). In 2021, the Foundation raised $443,000 in scholarship funding. In light of the pandemic, two major scholarship donors significantly decreased/didn't give as their revenue is derived from gift shop sales (gift shops were closed). A one-time endowment of $20,000 was established in memory of a long-time donor in the end of 2021. The endowment will be a significant benefit (as is the annual scholarships) to students year-over-year.

SAO 2

SAO Title
President's Associates Memberships - 35 members annually

Assessment Status
Assessed

SAO Summary and Reflection
The Palomar College Foundation will engage at least 35 members annually in the President's Associates. The Foundation has seen a significant decrease in PA member renewals as well as new memberships with only 30 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 Palomar's presidential leadership cause some members to not renew. With staff changes/transitions, PA stewardship has been challenging. The Foundation team is addressing the staffing to revitalize the renewal process in order to achieve this important goal moving forward.

SAO 3

SAO Title
Outside Grant Revenue - $50,000 annually

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. The year of 2021 saw a massive increase in grant revenue as we intentionally shifted our focus to this area to achieve our overall goals. As of December, we had received $293,482 in grant funding! This work is exceptionally time consuming as it not only required often a LOI, a grant proposal, but also the diligent work of a timely and detailed follow-up report. The fundraising team must work with faculty/staff to spend these funds in a timely manner.

SAO 4

SAO Title
Faculty Innovation Grants - award $40,000 annually

Assessment Status
Assessed

SAO Summary and Reflection
The Palomar College Foundation will offer at least $40,000 in faculty innovation grants annually. The Foundation saw a decrease in requests due to the district having significant HEERF/CARES funding. However, the Foundation did award over $25,000 to support CALM, Bravura, Transitions, and the MATH 78 conference.

OTHER ASSESSMENT DATA

Review the Quantitative and Qualitative Data from your comprehensive review. If there are updates please describe them below.
Quantitative: 2021 overall fundraising stretch goal is $1,500,000. As of December

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
-The Foundation's core programs including scholarships, textbook assistance and emergency grants exceeded revenue and kept thousands of students in school.
-Administered over 543 individual scholarships awarded
-Faculty innovation grants to support not yet funded initiatives of the district
-Increased donor stewardship without in-person events with individual scholarship photo books!

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) recently. The new system is user-friendly and intuitive to our needs. Having devoted our PT staff member to learning and growing the learning the functionality, we have reduced inefficiencies and increased donor stewardship.

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

Reminder: Data does not autosave. Save this content before moving to the next section or closing form.

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 of the Foundation is typically $2M. However, with the anticipated staff changes, this year we anticipate a reduction due to the lapse in a full-time fundraising position.

Describe Challenges
Development Officer (20 years of history) is planning to retire in June 2022. This provides a significant challenge to the department to absorb the work of two significant programs (scholarships and grants) to others on the team who are already working beyond a FT load.

Describe Outcomes (if any)
Ideally, we are able to hire the position sooner than later so we can reduce the gap in transition. We will strive, as always to meet $2M this year and in the future.

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 Community Showcase is significant work and this year, we anticipate not hosting the 5K due to the postponement of the CS. Instead, we will do CS in Spring and Golf Classic in Fall.

Describe Outcomes (if any)
We look forward to a successful introductory address and 75th anniversary celebration at the 2022 Community Showcase.

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 is 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 and now over $15M in 2021.

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.
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.
We continue to assess our event strategy due to COVID-19 and more importantly, the ROI on events. Although the 5K is "fun" it is not a significant fundraising event so we must assess the future of this event based on the time commitment in relation to other events. In addition, we spend a great deal of time on stewardship of PA members via events. It may be worthy of our time to instead assess prospecting new members vs. conducting events.

**Reminder: Data does not autosave. Save this content before moving to the next section or closing form.**

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?
No

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.

PART 2: BUDGET REVIEW

Review your Budget/Expenditure reports for 2019, 2020, and 2021. 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

Reminder: Data does not autosave. Save this content before moving to the next section or closing form.

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 11/19/2021.*
  - *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

Enter your email address to receive a copy of the PRP to keep for your records.
srungaitis@palomar.edu

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

Reminder: Data does not autosave. Save this content before moving to the next section or closing form.

Page 5 will show for reviewers (VP and/or Planning Councils) upon submission of the form.

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 Reviewed**
Star Rivera Lacey   1/19/2022

FEEDBACK

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

Areas of Concern, if any:

Recommendations for improvement:

Vice President Review

Strengths and successes of of the discipline as evidenced by the data and analysis:
Excellent work and progress towards meeting stretch goal with a clear understanding of the needs of the area. The accomplishments listed are outstanding and the data tells a complete story of the enormous gain that has happened in the last few years. It was a pleasure to read.

Areas of concern, if any:
A compelling argument was laid out for the need of human capital resources. It is clear that in order for additional growth to happen, there is a clear need for structure.

Recommendations for improvement:
No recommendation for improvement regarding PRP.

VP Name: **Signature Date:**
Star Rivera Lacey   1/19/2022