

Entry #: 41 - ---Advancement/Foundation

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2023-2024 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 and strategies necessary to improve the operation of your area. With that in mind, please answer the following questions.

BASIC UNIT INFORMATION

Are you completing a Comprehensive or Annual PRP?

Annual

Division Name

President's Office

Department Name

Advancement / Foundation

Program/Unit Name

---Advancement/Foundation

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

Stacy Rungaitis

Title

Executive Director/ Director of Development

PROGRAM/UNIT DESCRIPTION

Staffing

In this section, you will identify how many faculty and staff support your program. This information is considered when you request permanent staff and faculty hires. It is also useful as you evaluate your program and the human resources and talent you have to support our students.

To help you answer questions in this section, you will need the link shown in red below. This form required a login and password to access. Please use your Palomar email and password to log in.

Link: [Permanent Faculty and Staff Count](#)

Full-Time Staff

Total Number of Full-time Staff

3.00

Number of Classified Staff

1.00

Number of CAST Staff

Number of Administrators

2.00

Number of Full-time Faculty

Part-Time Staff

Total Number of Permanent Part-time Staff

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

1.50

FTEF of Part-time Faculty

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

One part-time staff paid by the Foundation to support administrative work. The other position is part-time but a vacancy for a FT Development Officer. This position is going to the board for replacement in May.

Program/Unit Description

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

Increased number of scholarships to administer (14 new); increased net assets to manage and administer (\$27M); increase student demand of emergency grant (awarding five times the pre-COVID amount each semester) - with less staff.

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PROGRAM/UNIT ASSESSMENT

SERVICE AREA OUTCOME 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 uses Nuventive Improve 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) Login to Nuventive Improve through the Palomar College [Single Sign-on](#).
- 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 method and/or 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](#)

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 AND REFLECTIONS

Each of your program/unit SAOs should be assessed at least once every three years. 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

The Palomar College Foundation will engage at least 35 members annually in the President's associates.

Assessment Status

Assessed

SAO Summary and Reflection

Using the Foundation's donor database and accounting systems, we accounted for annual membership in the President's Associates. Post-COVID we saw a drop in membership. This caused our team to be intention in rebuilding in-person relationships and continuing to target/make asks to increase (successfully) membership.

OTHER ASSESSMENT DATA

Review the Quantitative and Qualitative Data from your comprehensive review. If there are updates please describe them below. Completed comprehensive reviews can be found on the IRP website - "Completed PRPs".

Overall, the Advancement/Foundation team has increased all areas of quantitative data. With this, we have (simply put), more work. As we increase funding, the demands to steward the donors connected to these funds is increased. With a small staff, it places increased demands to fulfil all aspects of the donor's desires.

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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, the Foundation's net assets have increased to over \$27M. We have solicited and secured 14 additional scholarship programs, increased emergency grants to students - all resulting in removing financial barriers for students to 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?

The Foundation implemented a new policy to change our spending policy. This results in a more timely, accurate and streamlined approach to awarding endowment earnings. The changes impact the staff as with more assets, there is more to administer. All good for our students!

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

None

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PROGRESS ON PRIOR PRP 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.

[Click here for previous PRPs with goal information.](#)

Prior PRP Goals

Goal 1

Brief Description

Raise \$2M annually in support of our mission.

Choice

Ongoing

Add any comments related to your work on prior goal. Include outcomes or progress, successes and challenges, and reason(s) for eliminating a goal, if applicable.

Stretch goal for the foundation each year.

Goal 2

Brief Description

Increase participation in the President's Associates.

Choice

Ongoing

Add any comments related to your work on prior goal. Include outcomes or progress, successes and challenges, and reason(s) for eliminating a goal, if applicable.

After assessing the program, we implemented a strategic renewal process, stewardship and awareness of the program. Increased campus tours resulting in more members.

The Vision Plan 2035 includes the College's Educational Vision Plan. Review the goals and objectives in the plan and identify 1-3 objectives that your unit supports. Describe how your unit helps to support those objectives.

Goal 3-8: Maintain fiscal stability and increase external funding to support student enrollment, success and the district's fiscal health. The Foundation's scholarship and emergency grant programs (funded externally) support increased enrollment and retention strategies.

Goal 4 1-7: The Advancement/Foundation team support all activities and hold the strategic community engagement plan. The team is heavily engaged in the community bringing industry partners to the college to connect with educational members and help connect students to jobs.

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

As we look to stabilize staffing with the Development Officer coming on board in May, we look to address areas unable to attend due to lack of staffing. It's not IF we could grow, it's HOW/WHEN based on proper staffing levels.

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 five parts:

PART 1: Staffing Needs (Faculty and Additional Staff)

PART 2: Budget Review

PART 3: Technology Needs

PART 4: Facilities Needs

PART 5: 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 [Vision Plan 2035](#)

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.

NOTE: All requests listed in the PRP will be reviewed by deans and supervisors, then forwarded to the appropriate review group for prioritization. A resource requests approved to move forward in the review process does NOT guarantee a position or funding.

PART 1: STAFFING NEEDS

This year, units are asked to identify new positions only as part of the PRP process. Vacant positions will be addressed outside of the PRP process.

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.

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

Yes

REQUEST FOR ADDITIONAL CLASSIFIED, CAST, AA

Staff, CAST, AA request 1

Title of position

Development Officer

Is the position request for AA, CAST, or Classified staff?

Classified

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.)

Institutional Priorities - to help increase enrollment of students and to strengthen external and community partners.

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

Yes. It provides a restructuring of Advancement efforts not happening. Creating a pipeline of Alumni Relations and specialized community support not yet established.

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.

To grow any area of the Advancement arena, it will come to staffing. We are simply at our max level.

Vision Plan 2035 Goals and Objectives

3:8	4:2	4:4	4:6
4:1	4:3	4:5	4:7

If the position is not moved forward for prioritization, how will you address this need?

The Executive Director does as much of the work as possible. If no other staffing, the work simply doesn't get done. We are being left behind by other local colleges (and nationally) by not addressing the need.

PART 2: BUDGET REVIEW

Review your Budget/Expenditure reports for 2021, 2022, 2023. 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?

Yes

What budget considerations would you like your dean/supervisor to be aware of or to consider? Please be as specific as possible. For example, if you need an increase in the 40000 account and a decrease in the 23000 account, describe what increase your department needs, how much, and a description of why the department needs the adjustment.

Ideally, the Advancement/Foundation department would receive operational funding to support the implementation of the Community Showcase.

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PARTS 3, 4 and 5 – TECHNOLOGY, FACILITIES AND OTHER NEEDS

1. One-Time Fund Requests. Through the PRP process the college implements an approach for prioritizing and allocating one-time needs/requests. Prioritization takes place through the appropriate groups, leadership, and the Budget Committee. The executive team and Resource Allocation Committee consider various sources for funding PRP requests. Resource requests also inform the larger planning process like Scheduled Maintenance Plans, Staffing Plans, and institutional strategic planning.

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

If you are a CTE program and think you may qualify for CTE funds for your PRP request(s), you are STRONGLY encouraged to answer the call for Perkins/Strong Workforce grant applications in February. Contact the Dean of CTE for additional information.

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

1. Technology and Facilities Review. Requests for technology and facilities are assessed by the Deans and then, if appropriate forwarded to the proper institutional group (e.g., technology review committee, or facilities) for review and feedback.

PART 3: TECHNOLOGY NEEDS

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

Yes

Technology Request

Technology Request 1

What are you requesting?

Printer/Scanner/Copy Machine

Is this a request to replace technology or is it a request for new technology?

Replacement of Technology

Who is the current user of the requested replacement technology?

Advancement/Foundation team

Provide a detailed description of the request. Include in your response:

a. Description of the need? (e.g., SLO/SAO Assessment, PRP data analysis)

Our copy machine is one of the oldest on campus. It is starting to be difficult to repair; and often needs repair. We still have a need to print physical acknowledgement letters to donors and the quality of the letters needs to be exceptional.

b. Who will be impacted by its implementation? (e.g., individual, groups, members of department)

All

c. What are the expected outcomes or impacts of implementation?

Efficiency; better outcome of the appearance of our communications.

d. Timeline of implementation

Any

What is the anticipated cost for this request? If any, list ongoing costs for the technology (licences, support, maintenance, etc.).

Unknown

Do you already have a budget for this request?

No

What PRP plan goal/objective does this request align with?

What Vision Plan 2035 Goal/Objective does this request align with?

3:8	4:2	4:4	4:6
4:1	4:3	4:5	4:7

If you have multiple requests for technology and had to prioritize, what number would give this? (1 = Highest)

1

What impacts will this request have on the facilities/institution (e.g., water/electrical/ADA compliance, changes to a facility)?

NA

Will you accept partial funding?

No

PART 4: FACILITIES REQUESTS

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

No

PART 5: OTHER 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

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

Yes

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

srungaitis@palomar.edu

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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 Immediate Supervisor.

Immediate supervisor who reviewed PRP:

Star Rivera Lacey

Sign Date

8/7/2024

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 (or President) Review

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

Well thought out.

Areas of concern, if any:

None

Recommendations for improvement:

None

VP Name:

Star Rivera Lacey

Signature Date:

8/7/2024