

Administrative Department Review Plan

Due: *Spring, 2019*

Being an effective institution means the College is meeting its stated mission. Measuring degrees of effectiveness and modifying where needed to meet the mission is based on a philosophy of continuous improvement. The effectiveness of an institution isn't captured on what our "inputs" are, but what effect they have on students and the community. Administrative Department Review processes help to measure the effectiveness of the activities we do, and give strategic direction for improvement when needed.

Administrative Department Reviews are submitted to the President's Advisory Team, the President, and the Assessment Web Page every three years, and include:

- Review and confirmation of department mission, purpose, and expected outcomes related to College Mission and Vision.
- Identification of 1-3 assessment activities.
- Documentation of results and analysis of assessment activities.
- Identification of departmental needs related to goals.
- Provision of data for College Planning, including resource allocation.

Department Overview

Administrative Department	COCC Foundation
Contact (Person responsible for reporting)	Zak Boone, Executive Director
Participants	COCC Foundation staff
Date Review submitted	May 29 th , 2019
Report Submitted to	Matt McCoy, Vice President for Administration Dr. Julie Hood-Gonsalves, Institutional Assessment & Accreditation Project Consultant

1. Mission Fulfillment

How does your department support/strengthen the college's ability to fulfill its mission and vision?

Mission: Central Oregon Community College promotes student success and community enrichment by providing quality, accessible, lifelong education opportunities.

Vision Statement: To achieve student success and community enrichment, COCC fosters student completion of academic goals, prepares students for employment, assists regional employers and promotes equitable achievement for the diverse students and communities we serve.

Please provide your department's mission statement, including specifically how your department contributes to (check one or both):

Student Success

and

Community Enrichment

Department Mission Statement and Departmental Contributions to Student Success and Community Enrichment:

The Central Oregon Community College Foundation provides funds and fosters relationships to support students, programs and capital improvements. The COCC Foundation provides critical financial resources to aid in student success, and intentionally engages with a diverse range of external stakeholders and collaborators to ensure that the College is a vital, accessible, premiere, and well-respected educational resource.

2. Department Purpose

What are the key duties, responsibilities, and/or functions of your department that support your department mission? Include brief descriptions of staffing, budget, services, and location. (Location may be room or building specific, and/or branch campus specific.) Include any relevant recent changes. Response should be limited to one paragraph to one page maximum.

The COCC Foundation exists primarily to secure private funding to support the College, its students and programs. It is a wholly separate legal nonprofit entity, governed by a volunteer Board of Trustees and four active board approved committees. The Foundation's staff of 6 work as College employees, but are really a hybrid of sorts to ensure adherence to board driven policy and direction, while at the same time advancing the reach, reputation and resources available to move the College forward. Foundation finances are managed separately from College funds, and it maintains its own operating budget which is not part of the College's budgeting process or oversight. The Foundation offices are located in the Boyle Education Center on the Bend campus. Recent changes include the

hiring of a Major Gifts Officer in late 2017, and moving the reporting structure of the grants coordinator to the Foundation.

3. Department Strengths

What are your department's greatest strengths and/or most significant accomplishments during the past 1-3 years that support your department mission? What are the real, proven, consistent, documented elements of your department that make you stand out?

The COCC Foundation's greatest strengths and significant accomplishments in support of our mission over the past 1-3 years are as follows:

- *Offered the highest amount of available scholarship dollars to COCC students in each of the past 3 years*
- *Continued to grow and steward COCC Foundation assets, now topping \$23M*
- *Completely automated the scholarship application and process for students to an online, dynamic process. This has saved students, staff and volunteers hundreds of hours of effort*
- *Successfully execute Taste of the Town/Meal of the Year signature fundraising events each year, netting an average of \$345K directly in scholarship support*
- *Redesigned and rebranded the Foundation's newsletter, "Legacies" into a magazine highlighting the breadth and depth of COCC through a philanthropic lens*
- *The Foundation continues to provide expertise and resources to colleagues planning small fundraising and outreach events (examples include the COCC Math Contest, Turkey Trot, Cascades Hall Open House, etc.)*
- *Produced 19 Nancy R. Chandler Visiting Scholar programs over the past three years, increasing overall attendance in each year*
- *Continued successful management of over 19,000 individual donor and constituent records in database*

4. Department Challenges

Describe any challenges that may negatively impact accomplishing your department mission. What are the opportunities for improvement in your department? What internal and external factors challenge your area? Please use the terms "internal" and "external" in any way that is relevant to your department.

Internal challenges include:

- *Staffing challenges – new Administrative Assistant, new Major Gifts officer, recent vacancy in grants coordinator position*
- *Lack of cohesive external relations effort by the College – the Foundation is often leading the way in messaging, community engagement, without clear messaging and branding direction from the College*

External challenges include:

- *Continued presence of OSU Cascades and its effect on marketing, fundraising, etc.*
- *Recruitment of new volunteers to serve on board-approved committees*
- *Continuing to share the COCC story with new arrivals to the District*
- *Continued decline in enrollment*

5. Department Goals → Department Outcomes

Based on your strengths and challenges, what are your department goals? What product or service do you want to provide?

To measure success; What are your department's outcomes? What do you want to occur because of your services? (Limit total number of outcomes to 5 or 6 maximum). Identify 1-3 outcomes you will focus on this year.

- A goal describes the *output* (product or service) a department is planning to achieve through its organized activities.
- An outcome describes the *result for* or *impact on* a customer (internal or external), student, or the institution that is a consequence of the work you do.

Goal: Produce reliable, accurate and timely financial statements and reports

Outcome: Outside auditors express a "clean opinion" during annual audit.

Outcome: Meeting financial reporting deadlines for quarterly Finance & Audit and Board meetings, and annual IRS and state tax filings

Goal: Increase outreach efforts to COCC students to apply for a COCC Foundation scholarship

Outcome: 600+ students apply for a COCC Foundation scholarship for 2019-20

Goal: Improve and update donor records in Raiser's Edge database

Outcome: Ensure all donor records are current (address, phone, email, deceased, etc.) to allow for efficient, effective and meaningful engagement by Foundation staff and board.

Goal: Increase the number of full scholarships offered to COCC students

Outcome: Fundraising efforts will meet board-approved \$850,000 annual fundraising goal

Outcome: Sound fiscal oversight of endowed funds will result in positive financial returns to fund additional scholarships

6a. Procedure, Measurement Tool and Timeline

Describe the activities will you do to accomplish your Outcome(s). How will you measure your success toward the 1-3 outcomes and mission fulfillment? What tools will you use? (Survey, budget, Institutional Effectiveness department data, banner/Argos, etc.) How frequently will you gather relevant data? Provide any data references that you use. The Institutional Effectiveness department will provide relevant data upon request. Data will be reviewed and reported **annually** on the following page.

Outcome: Outside auditors express a “clean opinion” during annual audit.

Outcome: Meeting financial reporting deadlines for quarterly Finance & Audit and Board meetings, and annual IRS and state tax filings.

- *Activities to accomplish outcomes: adherence to monthly fiscal timelines, accuracy of accounts receivable/accounts payable, timely production of reports, sound recordkeeping, and strict adherence to internal policies and procedures*

Outcome: 600+ students apply for a COCC Foundation scholarship for 2019-20.

- *Activities to accomplish outcome: ensure continued ease of access to scholarship application software and track number of applicants over the course of the year; increase marketing and awareness of scholarship application to students.*

Outcome: Ensure all donor records are current (address, phone, email, deceased, etc.) to allow for efficient, effective and meaningful engagement by Foundation staff and board.

- *Activities to accomplish outcome: allocate financial resources in operating budget to pay for proprietary products which update database automatically; systemize process for data entry by staff to minimize error*

Outcome: Fundraising efforts will meet board-approved \$850,000 annual fundraising goal.

Outcome: Sound fiscal oversight of endowed funds will result in positive financial returns to fund additional scholarships.

- *Activities to accomplish outcomes: develop and execute annual fundraising plan; ensure adequate resources are in operating budget to engage in meaningful direct mail, in person and grant related fundraising requests; ensure members of Finance and Audit committee meet regularly to oversee endowed and invested funds; adhere to formal Investment Policy Statement*

Plan submitted every three years.

It will serve as a reference for resource allocation, activities, and planning during the three year cycle.

**Administrative Department Review
Report**

Due: _____

6b. Procedure, Measurement Tool and Timeline
What activities did you do to accomplish your Outcome(s)? How did you measure your success toward the 1-3 outcomes and mission fulfillment? What tools did you use? How frequently did you gather relevant data? Provide any data references that you used.
7. Data
What data have you gathered that inform your department's effectiveness?
8. Summary and Analysis: Continuous Improvement (Report-to be completed annually when data are available)
What do these data suggest about your department's effectiveness? Which measurements are strong and affirming? Consider the following points. <ul style="list-style-type: none">• Was your planned activity successful at accomplishing your Outcome(s)?• Have you accomplished your outcomes? Is there a need for a new direction? Which measurements indicate an area that you would like to focus on for improvement? <ul style="list-style-type: none">• Identify the goals and improvements that your department is committing to over the next year to help you accomplish your outcomes.• What support do you need from the college to carry out your planned improvements? Identify your biggest area(s) of need to help accomplish outcomes. Review question #2, including staffing, budget, services, and location.

Report submitted **annually**.
Data and analysis from three annual **Reports** will inform a new **Plan**.