



2019-2020 Tactical/Operational Annual Assessment Report

Goal: Assess progress on key functions, tactics and operations of designated area/division/department focused on in 2019-2020 using clear data, analysis, interpretation and reporting of findings, and plans for next steps (continual improvement).

Outcome: Areas of operation will discuss 3-6 tactics or operations, total, from the 2019-20 year in an outcome-oriented format, supported by data, with actions steps for the next year.

INSTRUCTIONS*

Using the tables on the following pages:

1. Assess each Tactic/Operation with available evidence and discuss progress, achievements, and success made based on available evidence and date.
 - a. **Progress and Successes** column should highlight significant progress made – discuss in outcome-related terms (What changed? How do you know?)
 - b. **Analysis and Interpretation** should refer to the indicators of success chosen in your fall assessment plans. Discuss your progress in relation to those indicators, indicate whether the indicator itself was a good representation of success and what it might change to if not, and note any internal or external trends that may have affected progress on this indicator. Highlight any budget-related needs that have hindered or could further progress and sustain success.
2. Describe a basic action plan for continuous improvement related to your assessment work.
3. On the budget/resource allocation page, describe effects of the department or division budget on future tactics/operations planning.
4. On the last page, complete survey and note what assessment resources and training are most needed for next year.

**** If other assessment documents are used for the “Progress Made” and “Action Planned” columns, note where the information is stored and include with this document.***



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Profile Information			
Division	Office of Advancement	Assessment of Tactical or Operational Plan? (circle one)	
Department		Division or Department Dean, Leader, Director, etc.	Chief Advancement Officer
Contributors to this report	Chief Advancement Officer and Director of Operations, UCC Foundation		
Mission statement and goals	<p>Mission statement: The Office of Advancement builds relationships and partnerships that raise philanthropic resources to promote and support the strategic priorities of UCC and student success.</p> <p>Division/Department goals:</p>		

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SP Goal 1: Improve institutional climate, culture and efficiency				
Tactic or Operation <i>Outcome-focused format</i>	Indicators of Success <i>Planned metrics and targets</i>	Progress and Successes <i>Based on data and evidence</i>	Analysis and Interpretation <i>Based on documentation from progress and success – refer to your chosen indicators of success</i>	Action Plan for 2020-2021 <i>Include major actions, indicators and related timelines based on this year's progress</i>
<i>Increase Operational Efficiency</i>	<i>Essential Foundation operations are examined and streamlined: fund account consolidation</i>	<p><u>Consolidation of Funds</u> Advancement staff was successful in working with guidelines from the Department of Justice to consolidate endowed funds that were under \$25,000 and over 20 years old. This allowed staff to consolidate 14 endowed funds totaling \$213,763.</p> <p>In addition, staff worked with donors directly to merge or spend down other restricted funds (10 additional funds). The UCC Foundation currently manages 210 different funds that support the College.</p>	The goal was to reduce active funds by 10% (21 funds). The goal was exceeded with an end result of 11.4% (24 funds). It was estimated that each fund cost the UCC Foundation approximately \$380 to administer. The reduction in funds equals an estimated annual savings of \$9,120.	With the reduction in the number of active funds that took place over the past FY, there are now 186 funds the UCC Foundation manages. An additional 10% reduction in funds can be anticipated in the coming year (18).
<i>Increase Operational Efficiency</i>	<i>Essential Foundation operations are examined and streamlined: staff training</i>	Forward progress for staff training did not happen this year due to many factors: lack of qualified applicants for open positions, COVID-19 restrictions and subsequent layoffs.	The goal was for seven staff members to go through Raiser's Edge; the donor management system used for fundraising, grants, alumni, and stewardship.	This activity has been moved to FY 2020-2021.

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SP Goal 4: Improve integration of the College with the community				
Tactic or Operation <i>Outcome-focused format</i>	Indicators of Success <i>Planned metrics and targets</i>	Progress and Successes <i>Based on data and evidence</i>	Analysis and Interpretation <i>Based on documentation from progress and success – refer to your chosen indicators of success</i>	Action Plan for 2020-2021 <i>Include major actions, indicators and related timelines based on this year’s progress</i>
<i>Enhance Donor Relations/ Support connections with the community</i>	<i>Develop an alumni relations program</i>	We successfully hired an alumni coordinator in January 2020. Two months later, the position was lost due to the restrictions that arose from COVID-19. Despite the challenge of losing the coordinator, we still managed to reach one of the two goals we set for this tactic. We were successful at reaching a 30% increase in alumni spotlight stories and not successful in a 100% increase in active alumni database contacts.	We projected a 30% increase in alumni spotlight stories. When we started, there were 30. The goal was 39. We reached the 39 goal. We also expected a 100% increase in active alumni database contacts. There are currently 64 active; Goal 64. At the end of this assessment report, there are now 70 contacts in the alumni database.	We will not be able to hire an alumni-dedicated employee in the near future. Existing staff will have to absorb this work. Based on that, we are projecting a modest 20% increase in alumni spotlight stories. In the coming year, the goal to reach is 47 stories. We will also work to achieve a 20% increase in alumni database contacts. All alumni work will be accomplished over the next FY.