



COLLEGE AREA REVIEW ADMINISTRATIVE AREA REVIEW REPORT_12

Office of Advancement and Community Engagement (Summary Report)

SECTION ONE: UNIT OVERVIEW AND MISSION

1. What is the unit's mission and goals and how do they correlate with the overall mission and goals of the College?

The Office of Institutional Advancement and Community Engagement (IA) supports the entire College community through many channels. From managing the College's social networking profiles to supporting all College sponsored events, IA is committed to the College's mission and is focused on operating "in a creative, innovative, flexible, and responsive manner." The office mission is reflective of the College's overall mission of enabling student success.

The vision of the unit is to create effective branding and build strong relationships in the Montgomery County community to reflect the College as an outstanding learning opportunity, cultural arts resource, economic development resource and intellectual center that is of high value to the future of the County and to its residents.

2. What are the major functions or services of the unit?

The Office of Advancement and Community Engagement has several major divisions (sub-units) that perform a variety of functions, which are briefly highlighted below:

- **Alumni and Annual Giving**
The unit supports the board of governors of the Alumni Association – an organization with over 100,000 members. The unit supports a very comprehensive alumni program while collaborating with the development office in fundraising for alumni, retiree “friends of the college” and employee donations. The Office of Alumni Relations and Annual Giving develops and implements policies, systems and procedures for the supervision and operational oversight of activities related to data collection, information management, and reporting. The unit is responsible for all direct mail solicitations and communication to alumni and supporters of the college through the college's magazine and other mediums to inform and maintain contact with the college's constituencies.
- **Development**
The major function of the unit is the discovery, cultivation, solicitation and stewardship of major gift prospects and donors to the College.
- **Communications/Public Relations (Including Marketing Department, MCTV, Media Relations and Creative Services)**

- Communications consulting, messaging, and implementation
- Writing/editing project management
- Media relations/public relations
- Photography
- Internal communications
- Presidential communications
- Marketing Department
 - The Marketing Department is responsible for producing high quality, creative, advertising/marketing materials within deadline and budget to diverse internal and external audiences, securing all ad placements, managing all aspects of the marketing budget, and the negotiation of all media buys on a Collegewide basis.
- Montgomery College Television (MCTV) is the educational video and digital media component of the Office of Communications.
 - MCTV provides high quality instructional and informational programming and award-winning video production services to Montgomery College academic and administrative areas, students, County Government and the local entities carried on the county franchisees' cable systems. These services share the stories of student success and extend the reach of the College's training and enrichment activities beyond the campuses and into the homes and businesses of the Montgomery County community and beyond.

■ **Advancement Foundation Finance**

- Process \$3 - \$4 million in gifts annually including bequests, pledges, non-cash gifts and gifts-in-kind.
- Oversee the management of the Foundation's \$22 million investment portfolio, including endowments, scholarship and designated program funds, and annuities.
- Manage and maintain the Foundation's municipal bond offerings (\$65 million to-date), the proceeds of which are used to renovate, build, or buy property for the College.
- Liquidate property donated to the Foundation.
- Provide funding for scholarships and College programs.
- Execute the daily financial transactions for the Foundation and prepare and maintain accurate financial accounting for the Foundation, subject to oversight of the Foundation Treasurer.
- Manage and provide supporting documentation for the annual audit.
- Provide financial support to the Foundation Treasurer the Foundation Board of Directors.

■ **Special Events**

The Office of Special Events manages and produces Montgomery College's ceremonial, social, and milestone events, while maintaining MC's traditions and protocol. The Office of Special Events is charged with portraying the best possible image of the College to the external community through programming and event design. Collegewide events include: Commencement, President's Special Events, Fall Opening Meeting, and when appropriate Anniversary Celebrations, Ground Breakings, Building Openings, Retirement and Welcoming Events. The Special Events Office also provides leadership and significant staff resources to critical events including Foundation Golf Classic, Scholarship Luncheon, Collegewide Holiday Party, and Alumni Awards Dinner, as well as various Development and Foundation Events. Initiatives including partnership with campuses such as Discovery Communications and Accenture lecture series as well as special guest speakers and conferences.

- **Advancement Services**
 - The unit produces prospect research on the current and potential donors;
 - The unit produces mailing lists for events, newsletters, direct mail, etc.
 - The unit serves as the liaison to IT on the technological needs of the unit;
 - The unit manages all of the data on over 100,000 alumni, parent and friends records in the Banner system.

- **Grants**
 - Seek grant and government contract funding opportunities that are consistent with College goals and objectives and inform the College community of these opportunities.
 - Develop competitive grant proposals
 - Manage the Perkins/DCTAL grant for the College
 - Engage our broader community by garnering resources and cultivating partnerships for program enhancements and service improvements.
 - Ensure compliance with federal and state regulations and reporting requirements through accurate recordkeeping, project monitoring, and effective training of grants project directors.

- **Community and College Relations and Life Sciences Park Foundation**
 - Future and pending sub-units
 - In the process of staffing these units

3. How have these functions or services changed over the last five year?

There has been drastic change over the last five years in this unit. Our name has changed. Highlighted below are examples of more specific changes:

- Advancement Services is now more strategic in its approaches to its work and advising others regarding mailings and all communications. This approach personalizes the efforts and often saves money with a more targeted population.
- The Alumni Relations office and the Annual Giving office have been combined to better communicate the financial challenges and needs of the institution to the alumni. The alumni activity has increased from in-person meetings to greater use of social media.
- Communications department has taken on major functions and services, such as presidential communications (writing and oversight of presidential speeches, talking points, video blogs, and more), academic editing and project coordination (College catalog, faculty handbook, student handbook, and Middle States Periodic Review editing), internal written communications (oversight and review of all major collegewide communications), and internal e-communications (oversight, writing, and editing of *Inside MC Online*, College e-newsletter).
- The Development sub-unit successfully completed a \$25 million capital campaign, the first of this size in the College's history and one of the largest campaigns for community colleges in general.
- The unit moved 'Annual Giving to Alumni Relations' to increasing annual giving among alumni and focus the Development Office on major gifts (\$25,000-plus).
- The unit developed significant partnerships with corporate and nonprofit partners—Discovery, Accenture, Pepco, Holy Cross—to support fundraising, academic/student services, and community engage goals.
- The unit started planning for the next capital campaign to support the President's MC 2020 Strategic Plan. This includes working with the Advancement Services unit to conduct a Wealth Screening and Predictive Modeling to analyze our donor/prospect base.

- Director of Finance was hired dedicated to the Foundation (previously, the CFO of the College also had fiduciary responsibilities for the Foundation). In addition, the Foundation participated in two additional municipal bond offerings.
- The implementation of a collegewide executive level Grants Review Committee has significantly enhanced the grants development process and has created a more collaborative environment for grant activities throughout the organization.
- The unit now has responsibility for management of the Perkins/DCTAL grant for the College. This responsibility formerly was held by an instructional dean.
- The College has grown significantly over the past five years in enrollment and in the number of programs and services offered which directly impacts Marketing’s workload and strategic outreach.
- Marketing oversees the College’s major social networking platforms – posting, editing, and formatting information, creating a presidential presence, creating dialogue, and providing a quick and cost- effective way for people to gain information both globally and personally.

4. To whom does the unit provide services (students, faculty, staff, donors, external constituents, others)? Please include an organizational chart as an attachment to this report.

The Office of Advancement and Community Engagement provides service to the entire College community, including all students, staff, and administrators and all academic and administrative units and all campuses. We communicate with and serve all external partners , such as, local and national corporations, educational institutions, news agency, and foundations, namely, USG, MCPS, Discovery Communications, reporters, alumni, and more. This office touches all Montgomery County and beyond through news stories, online content, publications and more. The office is working with other community colleges, four-year institutions, nonprofit organizations, and employers to build partnerships that benefit our students.

5. Given the College’s mission, how does your unit interact with other academic and non-academic College units?

The Office of Institutional Advancement and Community Engagement interacts with all College Departments directly or indirectly on a daily basis.

SECTION TWO: UNIT COST, RESOURCES, AND VITALITY

6. Staffing: List the number of employees in your unit that are classified as:

- Administrative:7
- Full time Staff: 61
- Temporary with Benefits Staff: 2
- Part-time Staff:1
- Temporary Staff: 7
- Other: 3

7. How are budgeting and resource allocation decisions made within this unit?

Most major budget decisions are made by the SVP in consultation with the Advancement management team. All other decisions are made by the individual unit leaders in consultation with others as needed.

8. Do you have sufficient resources, authority, and flexibility to accomplish the unit's objectives? (Please review and refer to your individual unit budget.)

No. The Banner system is insufficient to adequately support the needs of the advancement office and particularly the development office. The system is not user friendly and inhibits the use of the customer relations management tool. The consultants from Banner do not seem to focus much on the advancement module enough. The unit needs to acquire Raiser's Edge instead, which may also be used for grants management. While we have made improvements to Banner, this system simply is not designed to handle the level and sophistication of fundraising efforts needed to implement a \$25 million-plus capital campaign.

Other technological improvements would be expanded, such as, the use of e-blast and other social media to reach donors and prospects more efficiently and more cost effectively. As we fill vacancies, we need to ensure staff has the technology tools (laptops and/or iPads, Blackberries) and skills to be as efficient as possible in raising funds.

Also, we need a data management specialist to do the increased data mining needed for external communications. We are in need of key staffing position to maintain the quality of work and the increased work assignments that the unit is responsible.

Considering that Montgomery College is the largest undergraduate institution in the state of Maryland and the expectation to be known at a national level, we do not have sufficient resources, budget or staff, to adequately promote the College and its extensive and unique programs and events, and create overall awareness on a consistent basis. With a rebranding project added into the mix, on top of our regular workload, the resources are not there to complete all projects effectively.

9. How could resources within your unit be used more efficiently to address the unit's objectives/outcomes?

The cost effective and efficient strategies and procedures that are currently used and emphasized to all Advancement and Community Engagement staff are working effectively at this time.

SECTION THREE: FUTURE DIRECTION AND COMPREHENSIVE ACTION PLAN

10. What are the strengths and weaknesses of the unit?

Overall Unit

The strengths are the staff working in the various areas and sub-units. They drive the work and their critical thinking, abilities and talents, energies and dedication to Montgomery College generate quality products and results to serve our students and our community.

The weakness of the unit is the lack of staff in key areas such as data management, internal communications, grants, and community engagement continues to hamper the unit's effectiveness.

Alumni Sub-unit:

Strengths:

- Current alumni relations staff has many years of experience at the college and are dedicated to providing top programming and customer service to the College's alumni
- Alumni events and programming are well received and kept up-to-date
- Alumni benefits are strong for an institution of its size and are continually being reviewed and adjusted
- Annual Giving program continues to grow and routinely raised over \$600,000 for the college

Weaknesses:

- Reliance on temporary staff and other units for critical functions
- Lack of dedicated chapter/student relations staff
- Unit head is not classified as an administrator

Communications Sub-unit: (Public Relations)

Strengths:

- Skilled, experienced writers
- Creative and innovative professionals
- Dynamic photography talents
- Staff who are willing to embrace wide-ranging job responsibilities (for example: publication coordination, writing, editing, internal communications, and media relations performed by one individual)
- Strategic planning for new jobs (for example: State of the College address)

Weaknesses:

- Reactive versus proactive work, which was developed out of necessity due to too many requests and lack of staffing
- One and two-person shops, which means challenges when an individual team member is out on leave, sick, or cannot respond to all the demands
- The increasing need for the College community to receive strategic communications consulting on a wide range of projects in both the academic and non-academic units
- We are increasing our use of metrics with *Insights*, but we need to do audience measurement and surveys to learn from our other publications

Marketing (part of Communication sub-unit)

Strengths:

- The Marketing Department is a very creative unit not only with outreach and media placement, but with budget numbers and negotiation skills to give the College the most reach and exposure for its dollars.
- The Marketing Department has expert knowledge in marketing, outreach, and online communications.
- The Marketing Department handles all social media including standards, communication, development of training materials, and teaching CPOD classes.
- The Marketing Department prides itself on having strong, collaborative relationships with many departments within the College and external vendors.

Weaknesses:

- The Marketing Department does not have the proper budget to adequately market and keep up a consistent presence for the largest College in the state of Maryland.
- The responsibilities and numerous projects are growing rapidly and the Marketing Department is not adequately staffed to support the level of demand and expectation.
- The process by which we intake new projects can be reactive versus proactive.

- The first point of contact for new projects into the Office of Communications currently varies causing confusion and time delays.

Development Sub-unit

Strengths:

- The reputation of the College in the Montgomery County community is exceptionally strong. Among philanthropists, foundations and corporations, there is a growing recognition of the value of community colleges in terms of college completion and workforce development. President Dr. DeRionne Pollard is well-regarded in the community as a leader with a strong vision for the College. This positions the Development Office in a great place as the team solicits funds.
- The Development Office has established a strong stewardship and donor recognition program.

Weaknesses:

- Two of the areas—Planned Gifts and Corporate and Foundation Relations—are “one-person shops,” responsible for discovery, research, cultivation, marketing, soliciting, and stewarding \$25,000+ donors and prospects. These two administrator positions do not even have dedicated administrative support. This directly impacts the amount of gifts being brought in.

11. What obstacles or problems impede the success of the unit?

The cumbersome nature of the Banner advancement module and the lack of a data management specialist impede the success of the area. With a more user friendly CRM (customer relations management) system and another staff member, we can produce the reports needed and provide point and click reports to development officers easily.

The unit also needs a larger professional development budget so that this fledgling area can learn from the best four-year colleges and universities at conferences about their advancement services operations.

One challenge in recruiting for these new positions is the reclassifications of a number of positions from “director” to “manager.” In Development, “manager” is simply not a title that is widely used and will impact our ability to attract experienced candidates. We understand that we can use working titles but if positions are not advertised appropriately, we will fall further behind in recruiting and fundraising.

Concerning the Grants Sub-unit:

- Need greater accounting support for grants – the current accountants do a very good job but are spread too thin.
- Uncertainty about impact of various organizational changes within the College – it is increasingly difficult to know “who does what” within the organization in order to correctly point project directors to the right resources to resolve issues they may have.
- Lack of integration with academic structure means access to academic priority and planning discussions is delayed, and disables the unit from being as pro-active as it could be.
- National economic pressures and political changes will likely have a continuing and long-term effect on federal and state grant and contract funding.
- Lack of reward for faculty because they are often “volunteering” their time in writing and managing grants – will this reduce numbers who are interested in pursuing grants?

12. What are the most significant opportunities facing the unit in the next 5 years? How will these opportunities affect the future direction of this unit?

The biggest opportunity would be to purchase Raiser’s Edge. With this system, development officers would have a system targeted to their work and we would have a better record of donor and prospect visits, convenient donor and dollars raised reports, etc.

Another opportunity is to "upskill" the staff in the area to better understand data mining and prospect research and how to go about their work. Professional development in the form of CASE advancement services conferences and visits to other schools is critical to make this fledgling area into one of the best advancement services areas for a community college.

New technology allows us opportunities to uncover and promote newsworthy stories, people, and events. It can also be used to create dynamic, interactive publications. Plus, online publications (both internal and external) offer opportunities to promote the College without actually needing a reporter.

Rebranding the College offers new opportunities for our public relations/writing team to synchronize our writing, photography, and other communications efforts.

Moving forward, with a new strategic plan at the College and a rapidly changing higher education landscape, the time is right for the team to embrace and implement a proactive approach to creating messaging, news, and information, rather than wait for the phone call or e-mail request. This process should be developed to serve public relations and writing, and may extend to other areas of the Office of Communications.

In planning for the next fund raising campaign, we conducted a Wealth Screening and Predictive Modeling on the 164,000-plus constituents (donors, prospects) in the Advancement module of Banner. This revealed that we have a very large pool of likely donors in the \$25,000 to \$100,000 range. However, the pool of likely donors in the \$1 million range is very low. This information will impact how we will staff and structure the next campaign.

The President and College leadership have also developed a strategic plan that will shape the campaign and provide the Development Office with a vision and priorities to build a case statement for fundraising purposes.

13. List any risks, needs, and demands for services that the unit cannot currently meet and explain how do they relate to the College’s mission and goals? What do you recommend to address these items?

Five years ago, we cited the demand that the unit cannot meet was the ever-increasing need for scholarship support. This continues to be an issue. While we are raising record number of dollars for scholarships and making awards to a record number of students, we are still not serving all the students with financial need. The entire community is impacted when a student does not attend college because of the lack of financial support. Scholarships will continue to be the top fundraising priority.

Also, five years ago, we cited that Development and the Montgomery College Foundation were inundated with funding requests that are not achievable. While this continues to be an issue, we have developed a number of strategies to handle these requests:

- Requesting that faculty and staff first get approval from Deans and Vice Presidents/Provosts to ensure funding priorities are met.
- Implementing the Grants Review Committee with Senior Vice Presidents, Vice Presidents/Provosts, and the Dean of Deans, Director of Business Development and Grants, and Director of Corporate and Foundation Relations. This ensures that leadership representation from academic affairs, student services, human resources, facilities, and IT participate in decisions about funding priorities.
- Establishing the Innovation Fund and the Holy Cross Hospital Fund so all faculty, staff and administrators have the opportunity to seek grant funding for pilot projects.

Another area of concern is the need to begin our outreach efforts to current students. To do so effectively, we will need to rebuild our staffing and volunteer efforts to support this added dimension of activity.

Because of the increase in responsibilities of the Senior VP and the use of several funding sources (e.g., county, foundation, operating, auxiliary services, Life Sciences Foundation, capital budget and other outside sources), there is a greater need for identifying funding for community engagement planning, partnerships, collaboration and compliance monitoring.

In addition, we struggle to provide the College community the full-service event promotion that they want and need to spread the news of their lectures, art exhibits, concerts, and other activities to the community. With the new Office of Community Engagement set to launch in fiscal year 2013, the demands for media coverage, calendar listings, and news stories about our events will only grow.

14. In your opinion, what MC College policies or procedures impacting this unit are inefficient, ineffective, or need improvement? Please explain.

The entire College Relations policy and related procedures are no longer relative. They must be strengthened, as follows:

- There is no longer an Office of College Relations, and the policy should be changed to the Office of Communications.
- With the College’s rebranding efforts, the College procedures and standards should reflect the roles and responsibilities of the College community to follow the College colors and brand in all communications, from business cards and publications down to e-mails.
- A procedure does not currently exist related to the website. We need to develop one that includes rules and responsibilities for web content managers, which includes ADA compliance.
- A new procedure is necessary to address internal e-mail communications, as well as the expectation that official College communications will follow College editorial style.
- An updated procedure related to media relations will ensure that the College community works with the Office of Communications before speaking to the press.
- There is no governing policy or procedure about the Communications team governing the branding component at the college.

There is pressure on both the Development Office and the Office of Business Development and Grants to bring in additional private and public dollars to support scholarships, programs, and facilities. This comes from the various boards, the president and College leadership, and the deans and faculty/staff. While our two units embrace this challenge, the College needs to provide additional resources to manage the increased number public and private grants and gifts. Examples include:

- Compliance—with the greater emphasis on compliance, we need to ensure that grants and grant budgets are being managed properly. This impacts both public and private dollars. As such, we have

advocated for a Grants Compliance position in Institutional Advancement. The Office of Business Development and Grants has also instituted grants training and created a Grants Starter Kit. Deans, program directors, and faculty/staff charged with being the “principal investigators” need training and resources to manage these projects and budgets.

- Office of Business Services—From the OBS perspective, the amount of public and private grant funding is very small compared to the overall College budget. However, compliance and reporting issues can be a great deal of work. We need to move from “passive accounting” to “intrusive accounting,” where OBS, and the MC Foundation finance staff if appropriate, are working more closely with the principal investigators (especially those who are inexperienced managing grant projects and budgets) to ensure that grant deliverables and obligations are being met.
- Office of Financial Aid/Scholarships—As the Development Office is charged with raising more scholarship dollars, the unit responsible for awarding scholarships has seen its workload increased tremendously. We continue to meet with the Scholarship Director to improve workflow issues and have just purchased a scholarship software package; however, we will need to be able shift resources as necessary to meet the needs of our students.

Other Needed Changes in College Processes and Practices:

- The Grants unit prepared a draft Grants Management Handbook highlighting grant procedures that will both enhance compliance and in November 2011 which requires review and approval by senior leadership and input from multiple departments. Support is needed to encourage participation in completing the review and then aligning college policies and procedures to support the practices described in the manual to ensure compliance.
- The practices and recordkeeping of the Institutional Review Board must be brought into alignment with its approved charter to be sure it is functioning as intended by the Office of Human Research Protection.
- The management of the Perkins grant from within the Grants unit should be carefully analyzed and assessed as to see if this is an appropriate responsibility to include in the unit’s function.

Currently, there are no standards in place for social media usage. The Marketing Department is working on a Standard’s Policy that should be in place by fall 2012.

The Office of Communications is currently exploring the creation of web procedures relating to the rules and responsibilities of individual content managers which includes ADA compliance.

15. What internal or external benchmarks/indicators does the unit use to measure your effectiveness? What types of data does the unit use to monitor its effectiveness? How does the unit determine its effectiveness to the College community?

We monitor our effectiveness by the number or project requests processed, the time it takes to process a request, and if we met the deadline. We employ a variety of feedback mechanism.

SECTION FOUR: OTHER ADDITIONAL COMMENTS

Note: From all of the above information, recommendations should be made that would move your unit forward as a vital part of the college’s ability to perform its stated mission. These recommendations should be a natural progression from the substance and justification of the documentation that has been provided for the questions above. Submit your recommendations on the CAR Recommendations Report form.