

Syracuse University Case DII Venture Capital Fund Application

Workshop Title: Inputs and Outputs and Goals – Oh My! Program Evaluation for Foundation Relations Officers

Purpose: Program evaluation is the strategic process of gathering, analyzing and reporting information for decision-making purposes. Public and private foundations more often now request that proposals include SMART goals, objectives, inputs, activities, outputs, outcomes and impact. They want to ensure that data are collected which reflects the effectiveness of the program and/or that problems are uncovered which would lead to program modifications. All foundations aim for the effective stewardship of resources. They use evaluation data for ongoing learning, to determine the quality and impact of funded programs, to make future grant decisions and to assess their contribution over time.

Foundation Relations (FR) officers seek public and private foundation funding for faculty and institutional projects. Equipping FR officers with knowledge and skills related to program evaluation provides an additional competency for FR effectiveness. While FR officers are not responsible for the actual evaluation of programs and projects at institutions, there is value in understanding the components of evaluation. Benefits include determining program readiness for foundation funding, as well as guiding faculty and institutions in strategically developing effective, fundable programs and projects. Therefore, we propose a program evaluation focused workshop for up to 35 New York-based FR officers working at CASE District II (DII) member institutions.

Syracuse University will serve as the lead institution. Our Office of Professional Research and Development (OPRD) will facilitate the training. This office, located in the School of Education at Syracuse University, provides research, evaluation, and grant development services to university faculty as well as organizations starting up new programs or wanting to study current programs/organizational units. OPRD's capacity combines the scholarship of faculty from a private research university and esteemed School of Education with the expertise of seasoned field practitioners and research associates. In addition to working with higher education institutions, OPDR has worked with government entities, state organizations, school districts and foundations. Please see a list of select OPD projects here - http://opr.d.syr.edu/?page_id=16.

Our Director of Foundation Relations will work in conjunction with the Senior Director and will seek to collaborate with FR counterparts at two other CASE DII member institutions in Upstate New York – LeMoyne College and Colgate University.

The planning team will:

- participate in a planning and simulation workshop with the evaluators to ensure that the learning is applicable to FR work;

- create a registration form, set applicant criteria and determine maximum capacity for optimal effectiveness;
- select dates, a location and meals;
- distribute marketing materials for recruiting;
- select and prepare all materials for workshop participants; and
- host and facilitate on-site the day of the workshop.

The workshop will be advertised to all 215 CASE member institutions in the state of New York. The 35 participants will be selected on a first come, first served basis. The participants' institution will be responsible for travel and lodging.

Pending the outcomes of the simulation workshop, we tentatively propose the following breakdown of sessions:

Day 1 - 1pm to 5pm. Topics – (1) Evaluation Factors for Program Proposals and Logic Models and (2) Theory of Change: Dissecting the Components. Participants will have homework/group work at the end of Day 1.

Day 2 - 9 am to noon. Topic – Logic Models and Theory of Change: Application to Foundation Relations' Officers Work. Participants will receive feedback on their homework/group work to gain a better understanding of utilization.

Budget

The budget request for the event includes meals, materials and a stipend for the evaluation team that will serve as our presenters.

Meals		
	Day 1 - afternoon coffee/snack break	35*\$15 = \$525
	Day 2 - continental breakfast	35*\$25 = \$875
	morning coffee/snack break	35*\$15 = \$525
Materials	notepad, pen, pencil, free copy of resource guide, bag	35*\$50 = \$1,750
Presenter Stipend	Office of Professional Development and Research	2*\$300 = \$600

Other Impact:

This type of session is unique for CASE District II. It fulfills an unmet need in that DII webinars and the DII conference focus solely on “advancement services/donor relations, alumni relations, communications

and marketing, and development, and talent management”. There are no DII professional development opportunities specifically targeted to FR officers.

Support from the CASE Venture Capital Fund for this activity will provide hands-on training for Foundation Relations officers. It will show CASE’s commitment to FR beyond the annual Corporate and Foundation Relations conference. Additionally, other districts can replicate and host this same workshop for FR officers.

Number of Institutions involved in planning: Three (Upstate NY CASE DII member institutions - Syracuse University, LeMoyne College, and Colgate University)

Number of institutions involved in project: ~35 on-site (marketing information will be distributed to all 215 CASE DII NY member institutions). While this may seem like a small number of institutions, it is important to note that all 215 CASE DII NY member institutions do not have FR officers. For example, of the four CASE institutions in/near Syracuse, NY only two have this role. In order to expand the reach that this session might have, the FR Director at Syracuse University will maintain a database of all registrants and will share handouts and slides with registrants that are not selected to attend. Additionally, if requested the Director will work with other institutions and/or the leadership in DII to host similar workshops in their areas.

Start Date: Spring 2019

End Date: Spring 2019

Amount Requested: \$3,500