

**DRAFT**

**MESA STRATEGIC PLAN IMPLEMENTATION: 2014-2016**

Over the course of nearly two years, MESA worked on a strategic planning effort that was both top down and grass roots up. It included consultation and analysis by a wide variety of MESA’s stakeholders as well as MESA staff in all education segments. As a result, MESA is implementing a comprehensive plan over the next three years that will set new goals, create new structures and engage new partners in the essential work of preparing the next generation of STEM students and STEM professionals for the state and the nation. Monitoring MESA’s progress in achieving the goals of its strategic plan is within the purview of the MESA Intersegmental Steering Committee.

To organize the work, the information gleaned from surveys, dyad conversations, focus groups and “town meetings” of constituents was used to prepare an extensive set of recommendations for consideration by the then-MESA Advisory Board of Directors (now defunct). The detailed goals and objectives have been used to identify five critical Strategic Priority Areas and then frame three-year strategic goals for each.

STRATEGIC PRIORITY AREAS	THREE - YEAR STRATEGIC GOALS
1. MESA Overall Program	Align, consolidate and expand the California MESA program to increase the number of program graduates through seamless and cohesive Inter-segmental collaboration.
2. MESA Intersegmental Oversight and Leadership	Provide intersegmental strategic leadership and guidance to CA MESA in defining and implementing its operations, resource generation and research/evaluation agendas in a manner consistent with its vision, purpose and strategic goals.
3. MESA Industry Advisory Council	Provide critical industry advice and linkages that facilitate state, regional and local industry partnerships in support of MESA student outcomes.
4. MESA Management Operations and Implementation at state, regional and local levels	<p><i>Statewide Office:</i> Provide effective management and guidance in support of successful operations and implementation.</p> <p>Focus Area A: Strengthen statewide office internal capacity.</p> <p>Focus Area B: Enhance the successful implementation of the CA MESA program.</p> <p>Focus Area C: Position MESA as the premier STEM program in the state and the nation.</p>
5. MESA Resource Generation	<p><i>Statewide Office:</i> Create the basis for CA MESA capacity and program development, through sustainable and diversified financial growth.</p> <p><i>Centers and Regional Alliances:</i> Increase Center/Regional level service delivery through local and regional resource development.</p>

Excerpted from MESA’s “Multi-Year Strategic Plan (2013-2016): Executive Summary”

## **MESA STRATEGIC PLAN IMPLEMENTATION**

To move the plan from information collection and framing to implementation, work charge was developed for each of four work groups to undertake the implementation plan development based on the recommendations of the Glen Price Group consulting team. The areas were chosen to address one or more of the strategic priority areas in the context of an operational area of MESA. The areas are Resource Development and Industry Relations, Communications, Partnerships, and Research & Evaluation.

A working group for each of the four operational areas was established. After engaging in discussions of the work charge for each group, the MESA center directors selected members to participate in each working group. Because there are only thirteen centers in this unit, the members chose to appoint only one director to each group. (See Appendix A for list of working group members.)

The timing during the year was not ideal for finding the substantial amount of time required to consider the implementation plan fully. Each of the working groups had considerable difficulty in raising a quorum once the academic year ended in mid-June. Nevertheless, after a series of conference calls and another face to face meeting of the working teams, each team did produce an implementation document for its area. The documents provide detail on implementation for the next three years, with particular attention to the first year (2014-15.) The current implementation plan is an integration of the work of the four groups. What emerges is an operational plan for MESA on a statewide level with objectives, outcomes anticipated and expected time for implementation. Each objective has someone with responsibility for the work and there is a discussion of the necessary interdependency among MESA partners that must be in place to make the implementation work. (See Appendices B through E for the four working groups' plans.)

Upon review and approval of the plan by the MESA Intersegmental Steering Committee, the final integrated plan will be distributed to key MESA stakeholders, including all of the center directors. It will be a subject for discussion at each of the program unit's fall meetings. That discussion will be led by the working team members from the appropriate program unit. Being able to present the plan in this format is a testament to the commitment of the working group members who not only represented their program units but came together as colleagues to represent the unified MESA that underlies all of the strategic planning work.

### **2014-15 Implementation**

Each of the working groups addressed an area critical to the success of MESA and in their work the groups acknowledged that all of the activity necessary to move MESA in its new direction could not be accomplished in the short-term, i.e., a single year. Nevertheless the work must begin and each group plans to use the first year to structure the foundation for the larger plan implementation. The following actions will be taken in the 2014-15 year to implement the MESA strategic plan recommendations.

## MESA STRATEGIC PLAN IMPLEMENTATION

### Communications

*Strategic Priorities(SP) from Strategic Plan Recommendations being addressed:*

- *Develop and Implement a three-year communications plan (SP1)*
- *Acknowledge MESA's new strategic direction through a branding campaign (SP2)*

Actions to be taken:

1. Message points and positioning are aligned with MESA vision and mission for targeted key audiences.
2. In conjunction with the messaging points, templates/shells will be developed for materials design, training guidelines for use by partners and preparation for a branding campaign for MESA.
3. Customizable materials will be designed for communications, resource development, program and partners, as will services available to internal and external partners.
4. The redesigned MESA website will be launched, reflecting the messaging created from the strategic plan and including an intranet function for MESA center and statewide office staff.
5. A budget plan for the next three years (2015-18) will be developed.

### Resource Development

*Strategic Priorities(SP) from Strategic Plan Recommendations being addressed:*

- *Diversify funding base (SP1)*
- *Increase investment by industry (SP2)*
- *Increase professional development for all staff (SP3)*

Actions to be taken\*:

1. Research and identify stakeholders as prospective investors in MESA\*
2. Identify key STEM leaders and experts who are providing research on STEM education and workforce issues.\*
3. Industry Advisory Council (IAC) promotes visibility of program / advocates for STEM education and workforce issues.\*
4. IAC works to align MESA with corporate social responsibility and philanthropy efforts.\*
5. Develop solicitation materials that target varied potential funding sources.
6. Develop specific strategies for specific requests: identifying proper individuals at MESA and at funding target to move request.
7. Identify and recommend new and existing MESA initiatives for additional funding.
8. Develop alternative and innovative fundraising strategies and activities.
9. Develop annual resource development plan.
10. Review and recommend changes/refinements to the MESA resource development plan that complement the identification and cultivation of industry investors and other funding sources.
11. Develop and cultivate local Industry Advisory Boards.

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12. Select local IAB members to serve on statewide IAC.
13. Invite faculty, campus leaders (deans), alumni and experts to interact with IAC

(\*on-going activities to be implemented in 2014-15 year.)

### Overall Program/Partnerships

*Strategic Priorities(SP) from Strategic Plan Recommendations being addressed:*

- *Inventory and assess current landscape of MESA partnership(s) (SP1)*
- *Define, identify and disseminate best practices within Partnership(s) for MESA (SP2)*
- *Identify strategies for maintaining, enhancing and strengthening partnership(s) at all levels. (SP3)*

Actions to be taken:

1. Develop partnership survey\*\*.
2. Administer survey to all MESA Centers\*\*.
3. Compile Survey results\*\*.
4. Analyze survey, identifying different partnership trends across segments; and identifying cross-cutting themes with other committees.
5. Disseminate and share survey results and analysis with other work teams (via Basecamp).
6. Analyze survey and utilize to identify definitions of successful partnerships; and identify successful partnerships for replication within and across segments.
7. Disseminate initial findings inviting Director/Regional Alliances feedback.
8. Revisit Regional Alliances goals/purpose/ scope.
9. Develop MESA Partnership Development Plan that includes an assortment of strategies at two levels – statewide and locally aligned.
10. Compile and create partnership tools across centers (e.g. MOU/formal agreement templates, etc.)

(\*\* indicates actions already completed.)

### Research, Evaluation and Information Management

*Strategic Priorities (SP) from Strategic Plan Recommendations being addressed:*

- *Make the program's centralized database system operational to allow improved collection of MESA student data and to track student progress over time (SP 1, Obj. I.A.5)*
- *Support the capacity of all education segments to conduct timely and relevant program research and evaluation (SP IV, Obj. IV.H.1)*

Actions to be taken:

1. Each program unit will have a set of assessment questions that will be answered annually to describe program demographics. (See Appendix F for proposed questions for each unit.)

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2. A single, central database housing demographic, performance, and activity data is in place.
3. As much as is practical, data elements reported will be commonly defined across the unit of measurement (i.e., statewide, center, region) to allow for reasonable comparisons.
4. The ability to create *ad hoc* reports will be available through the database for statewide staff and center directors.

While it should be apparent, two things are worth stating. First, the actions to be taken as defined today may change as the environment changes for MESA. Thus there is less activity developed specifically for the latter two years of the plan at this point. What happens in the first year will affect subsequent years and help to create the next year's formal plan. It is also worth stating that the activities of each area are not unique, isolated events. There is a constant interaction that serves the needs of MESA, the umbrella organization. The Statewide Office by its nature is a service organization. The delivery of the model MESA program is the primary activity of the organization. In order to do that MESA's value must be communicated, its success must be documented and that success must be leveraged to gather resources, financial and human, to support the delivery effort. Each of the proposed actions in the implementation plan is deemed to be essential to program success. It is an on-going effort and requires a multi-year action /implementation plan to chart that support for success.

For example, the Research, Evaluation and Information Management (RE&IM) area lists only four action items for implementation and completion in 2014-15. The items, however, lay the ground work for more work to come. The first year also lays the groundwork for some of the other areas to be successful. Data and its practical cousin information are critical to having a story to tell to our various stakeholders and to the public. Unless the base is solid, everything we build on that base may not stand. For RE&IM the work continues in the subsequent years of this strategic plan to strengthen that base and broaden it, as can be seen below.

RE&IM Future Implementation of the Strategic Plan – 2015-16 and 2016-17

Actions to be taken:

1. An external report on the efficacy of each of the program units and the statewide office will be completed by an outside agency.
2. Each program will be able to track student characteristics and outcomes over time to inform program formative assessment.
3. The results of the external evaluation will be widely disseminated to MESA stakeholders.
4. The results of the study will be used for formative evaluation purposes by MESA.
5. Standardized reports will be available on demand for the requesting party.
6. A schedule of on-going studies of aspects of the MESA program will be put in place.
7. Standard assessments and ad hoc reporting will be available for the Statewide Office, regional alliances and individual centers.

## **MESA STRATEGIC PLAN IMPLEMENTATION**

### **Implications for MESA Statewide Office Structure**

The task that lies ahead for MESA is significant. Throughout the effort of the four working groups the impact the work will have on current staffing is evident. In fact requests for staff are embedded in the reports of the group. MESA's staff is small, and over the past year even more so with two positions unfilled, awaiting the strategic plan's completion and the direction that would give to how best to fill those slots. It will be necessary to adjust the current staff structure to the new work ahead. That means changes in the current organizational structure, as well as additional staff. Resource Development needs someone who can write proposals and do it quickly in significant numbers if the goals of the unit are to be met. Underlying almost all of the work described in the working groups' documents is a need for timely, accurate data. The RE&IM unit does not have the analytical capacity required to turn the data collected into the information that is to be disseminated. As a one-person shop, communications must pick and choose among the possible activities to undertake. Therefore, once the implementation plan is operational, reorganization of current staff and requests for additional support will be forthcoming if MESA is to complete the agenda the working teams have developed.

### **Conclusion**

It should be noted that work resulting from the recommendations on the strategic plan has already begun with some success. The governance structure for MESA is newly in place. The Intersegmental Steering Committee (ISC) is meeting regularly and keeps MESA, and its strategic implementation, under administrative review. The Industry Advisory Council will hold its first meeting in concert with the annual undergraduate Student Leadership Conference in October. The partnership survey referred to in the Partnership section of the implementation plan has been created, distributed and analysis is under way. Work continues on the MESA database; data element lists have been distributed to all MESA program units for discussion and comment. Finally, the redesigned and upgraded MESA web site has moved from the drawing board to the development stage with an expected launch in October.

The strategic planning process has energized the MESA community and as implemented, it will keep MESA as agile, innovative and successful in its second fifty years as it has been in its first fifty.

## APPENDIX A

### MESA STRATEGIC PLAN WORKING GROUP MEMBERS

#### Communications

Danielle McNamara, MESA Statewide Office (chair)

Cathy Lipe, MCCC Director, Canada College

Alexandria Leckliter, MSP Director, UC Santa Cruz

Luis Topete, MSP Program Coordinator, San Diego State

Catherine Shaffer, MCCC Director, Santa Ana College

Veronica Brown, MEP Director, University of the Pacific

#### Resource Development

Julian Martinez, MESA Statewide Office (co-chair)

Dante Noto, Education Partnerships, UCOP (co-chair)

Mae Cendana Torlakson, Manager Resource Development, MESA Statewide Office

James Hale, Fundraiser, Education Partnerships, UCOP

Martin Belles, Volunteer Advisor

Hernán Maldonado, MEP Director, CSU Fresno

Arturo Hernández, MCCC Director, El Camino Collage

Maria Garcia-Sheets, MSP Director, University of the Pacific

Duane Goodman, MCCC Director, College of the Sequoias

Christina Ramos, MSP Director, San Jose State University

## **MESA STRATEGIC PLAN IMPLEMENTATION**

### **Overall Program/Partnership**

Juanita Muniz-Torres, MESA Statewide Office (co-chair)

Claudia Martinez, Education Partnerships, UCOP (co-chair)

Mario Castellanos, Executive Director, Office of Education Partnerships, UCSB (co-chair)

Blanca Sanchez-Cruz, MEP Director, San Jose State

Thelma Federico, MSP Director, CSU Los Angeles

Debbie Velasquez, MESA Liaison, CA Community Colleges

T. Fox, MEP Director, CSU Los Angeles

Rita Torres, Program Coordinator, MESA Statewide Office

Consuelo Gonzalez, MCCP Director, Bakersfield College

Jose Hernandez, MCCP Director, Napa Valley College

Jessica McCready, MSP Coordinator, Santa Rosa Field Station

### **Research, Evaluation and Information Management**

Oscar F. Porter, MESA Statewide Office (co-chair)

Ravinder Singh, Education Partnerships, UCOP (co-chair)

Virginia Estrella, MCCP Director, Santa Barbara City College

Carlos Gonzalez, MSP Director, UC Riverside

Justin Ilumin, MESA Statewide Office

Saba Johannes Reda, MSP Director, CSU Long Beach

Gisela Spieler Persad, MCCP Director, Rio Hondo College

Lydia Zendejas, MEP Director, UC Santa Cruz



## APPENDIX B

### Communications Action Plan

#### 1. Related Strategic Priority

Select the organizational priority or priorities that this initiative will help to achieve

- SP #1: Develop and implement a 3- year communications plan
- SP #2: Acknowledge MESA’s new strategic direction through a branding campaign

#### 2. Initiative Context and Expected Results

The mission of the Strategic Communications unit is to advance this statewide mission, through an integrated marketing communications approach, with a focus on MESA’s key stakeholders:

- Legislators/ the governor
- Industry
- Education partners: UC, CSU, California Community Colleges, Association of Independent California Colleges and Universities, Department of Education (all segments of California education)
- UC Office of the President (steward of MESA, per state legislature)
- School district/ campus officials
- Local communities
- Participants (students/families) and potential participants
- Alumni

The goals of the Strategic Communications unit are to advance MESA’s positioning by demonstrating the importance of MESA to the state’s economic health.

#### 3. Team

<b>Initiative lead:</b>	<i>Danielle McNamara, Statewide Office, UCOP</i>
<b>Team members:</b>	<i>Cathy Lipe, Canada College</i>

**MESA STRATEGIC PLAN IMPLEMENTATION**

	<p><i>Alexandria Leckliter, UC Santa Cruz</i></p> <p><i>Luis Topete, San Diego State</i></p> <p><i>Catherine Shaffer, Santa Ana College</i></p> <p><i>Veronica Brown, University of the Pacific</i></p>
<b>Proposed start date:</b>	07/01/2014
<b>Proposed end date:</b>	06/30/17

**4. Resources Required**

<b>Financial and other resource implications:</b>	<i>Training, consultants, writers, resource development, collateral, staff</i>
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**5. Initiative Work Plans and Interdependencies**

<b>Objectives</b>	<b>Outcomes</b>	<b>Lead</b>	<b>Due Date / Milestones</b>	<b>Interdependencies</b>
<i>List by objectives for initiative in chronological order of estimated completion</i>	<i>List the expected outcomes for each objective</i>	<i>Designate the person who will own initiative</i>	<i>MM/YYYY</i>	<i>List requirements from departments/ functions within the organization (i.e., fundraising, training, HR, evaluation, etc.) needed to achieve each objective</i>
Build a messaging framework/plan (through ID of proof points)	Message points & positioning aligned with new MESA vision, mission for targeted key audiences (including proof points)	Marketing consultant  Branding professionals  *Data/proof points needed to complete framework	8-12 weeks (after funding, necessary data and personnel in place)	Data (proof points), student outcomes, funding
Create a branding campaign	Materials design work Guidelines, training for creating, materials use (uniformity) Training for key dates/how-to-use materials strategically (hands-on) Create/print launch materials for centers (posters, banners, etc.)	PR, media relations, advocacy experts (external contractors)  Graphic design	Begin possible shell/template work 9/14 -- continue in conjunction with messaging framework creation	Designers, training, funding

**MESA STRATEGIC PLAN IMPLEMENTATION**

	Branding launch	(external contractor) MESA Statewide Office		
Identify roles, responsibilities, requirements for personnel within SWO-UCOP to successfully implement communications plan	Create an org chart for communications roles Assign a plan project manager/ implementer	Communications work group	9/14	
Identify online communications for Intranet for use by center and SWO staff	Create customizable collateral (for communications and other MESA components) Gather content Content creation (tiered)	MESA Statewide Office Communications work group Media relations professionals (identify and release to local outlets) Government affairs professionals from all segments	Begin: Identification – 10/1/14 Content release (tier 1) – 2/1/15 Content release (tier 2) – 6/1/15	Coordination with AICCU, CCCCO, CSU, and UCOP media relations and communications offices
Redesign website	Implement messaging/ branding plan into external website content		Launch: 10/1/14 (excluding tiered intranet materials release)	Internal approvals from UCOP consistent with external contractor policies
Budget	Create a 3-year budget plan (Year 1 start-up costs): Yearly costs per center and at SWO	Communications work group	Begin: 10/1/14	Review of budget plan by MESA ISC
Identify professional development needs	Experts on-call for help to centers (capture those experiences to share later) Opportunity to bring center staff to in-person trainings In-person, hands- on tutorials and webinars New director trainings	PR experts (external contractors) MESA Statewide Office Communications work group	Begin 1/1/15 (tiered through entire 3-year plan)	Internal approvals from UCOP consistent with external contractor policies

## APPENDIX C

### MESA Resource Generation Action Plan

#### 1. Related Strategic Priority

Select the organizational priority or priorities that this initiative will help to achieve

- SP #1: Diversify funding base
- SP #2: Increase investment by Industry
- SP #3: Increase Professional Development for all staff

#### 2. Initiative Context and Expected Results

Resource development in MESA identifies, pursues and procures resources to increase the sustainability and growth of MESA. Implementation will increase the amount of external resources, which will enable MESA to produce STEM leaders and professionals. Implementation progress will be assessed by tracking the amount of resources secured annually as compared to established yearly targets.

#### 3. Team

<b>Initiative lead:</b>	<p><i>Julian Martinez, Director, Resource Development and Marketing, MESA Statewide Office</i></p> <p><i>Dante Noto, Director, Resource Development, Education Partnerships, UCOP</i></p>
<b>Team members:</b>	<p><i>Mae Cendana Torlakson, Manager, Resource Development, MESA Statewide Office</i></p> <p><i>James Hale, Fundraiser, Education Partnerships, UCOP</i></p> <p><i>Martin Belles, Volunteer Advisor, MESA Statewide Office</i></p> <p><i>Hernán Maldonado, CSU Fresno</i></p> <p><i>Arturo Hernández, El Camino College</i></p> <p><i>Maria Garcia-Sheets, University of the Pacific</i></p> <p><i>Duane Goodman, College of the Sequoias</i></p>

## MESA STRATEGIC PLAN IMPLEMENTATION

	<i>Christina Ramos, San Jose State University</i>			
<b>Proposed start date:</b>	07/01/2014			
<b>Proposed end date:</b>	06/30/2016			
<b>4. Resources Required</b>				
<b>Financial and other resource implications:</b>	<p><i>Personnel –Grant writer, regional part time fundraisers, marketing consultants</i></p> <p><i>Travel/meeting budget, printing, social media</i></p>			
<b>5. Initiative Work Plans and Interdependencies</b>				
Objectives	Outcomes	Lead	Due Date / Milestones	Interdependencies
<i>List by objectives for initiative in chronological order of estimated completion</i>	<i>List the expected outcomes for each objective</i>	<i>Designate the person who will own initiative</i>	<i>MM/YYYY</i>	<i>List requirements from departments/ functions within the organization (i.e., fundraising, training, HR, evaluation, etc.) needed to achieve each objective</i>
Diversify funding sources	<p>Research and identify stakeholders as prospective investors in MESA.</p> <p>Develop solicitation materials that target varied potential funding sources</p> <p>Develop specific strategies for specific requests: identifying proper individuals at MESA and at funding target to move request</p> <p>Identify and recommend new and existing MESA initiatives for additional funding.</p> <p>Develop alternative and innovative fundraising strategies and activities</p> <p>Develop annual Resource development plan</p> <p>Review and recommend changes/refinement to the</p>	MESA Statewide Office in collaboration with MESA Centers and in consultation with Intersegmental Steering Committee and UCOP as fiscal agent for MESA	<p>Ongoing across segments beginning July 1, 2014</p> <p>Conducted quarterly at MESA component meetings.</p> <p>Presented annually to MESA ISC (November 21,2014)</p> <p>May 2015 for 2015-16 planning</p>	<p>Updated donor database</p> <p>Training for MESA directors</p> <p>Support from UCOP to ensure no conflicts of interests and compliance with delegations of authority for gifts and grants</p>

## MESA STRATEGIC PLAN IMPLEMENTATION

	MESA resource development plan that complements the identification and cultivation of industry investors and other funding sources.			
Establish an Industry Advisory Council	<p>Develop and cultivate local Industry Advisory Boards</p> <p>Select local IAB members to serve on statewide IAC</p> <p>Cultivate other active, major corporate leaders to serve on IAC</p> <p>Establish roles and responsibilities for IAC: commitments/ expectations</p> <p>Identify key STEM leaders and experts who are providing research on STEM education and workforce issues</p> <p>Invite faculty, campus leaders (deans), alumni and experts to interact with IAC</p>	MESA Statewide Office in collaboration with MESA Centers	October 2014	<p>Support from UCOP to ensure no conflicts of interest in selection of IAC participants</p> <p>Review by ISC of prospective participants</p> <p>List of prospective faculty and administrators solicited from MESA Centers and ISC</p>
Improve Center / Regional Alliance fundraising outcomes	<p>Provide development support to centers and regional alliances</p> <p>Increase center/regional level service</p>	Regional Alliance subcommittee work team	Ongoing beginning July 1, 2014	

## APPENDIX D

### Initiative #: MESA Overall Program/Partnerships Plan

#### 1. Related Strategic Priority

Select the organizational priority or priorities that this initiative will help to achieve

- SP #1: Inventory and Assess Current Landscape of MESA Partnership(s);
- SP #2: Define, Identify and Disseminate Best Practices within ‘Partnership(s)’ for MESA;
- SP #3: Identify strategies for maintaining, enhancing and strengthening partnership(s) at all levels.

#### 2. Initiative Context and Expected Results

The Partnerships Committee works to define and identify what components make up proven/successful partnerships that will support the overall mission of the MESA program(s). This effort will create a framework for identifying successful partnerships that will result in increasing the number of program graduates from higher education who move successfully into STEM careers and will contribute to strengthening the MESA Core Network. Implementation success will be assessed by developing and administering a survey to inventory current partnerships, followed by identifying and disseminating best practices that can be used as the basis for developing future partnership(s) at all levels.

#### 3. Team

<b>Initiative lead:</b>	<p><i>Juanita Muniz-Torres, Statewide Director of Programs, MESA, UCOP</i></p> <p><i>Claudia Martinez, Deputy Director, Education Partnerships, UCOP</i></p> <p><i>Mario Castellanos, Executive Director, Office of Education Partnerships, UCSB</i></p>
<b>Team members:</b>	<p><i>Blanca Sanchez-Cruz, MEP, San Jose State</i></p> <p><i>Thelma Federico, MESA Director, MSP, CSU Los Angeles</i></p> <p><i>Debbie Velasquez, MESA Liaison, CA Community Colleges</i></p> <p><i>T. Fox, Director, MEP, CSU Los Angeles</i></p> <p><i>Rita Torres, Program Coordinator, Statewide MESA, UCOP</i></p> <p><i>Consuelo Gonzalez, MCCP Director, Bakersfield College</i></p> <p><i>Jose Hernandez, MCCP Director, Napa Valley College</i></p>

## MESA STRATEGIC PLAN IMPLEMENTATION

	<i>Jessica McCreedy, MSP Coordinator, Santa Rosa Field Station</i>
<b>Proposed start date:</b>	07/01/2014
<b>Proposed end date:</b>	06/30/2016

### 4. Resources Required

<b>Financial and other resource implications:</b>	<i>Personnel – Evaluation Coordinator (technical services/survey development and analysis); Partnership Development Program Coordinator; travel/meeting budget, printing, updated documents in intranet (MESA statewide website “staff room”); exchange of databases with resource development (for tracking of partnership/resource development).</i>
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### 5. Initiative Work Plans and Interdependencies

Objectives	Outcomes	Lead	Due Date / Milestones	Interdependencies
<i>List by objectives for initiative in chronological order of estimated completion</i>	<i>List the expected outcomes for each objective</i>	<i>Designate the person who will own initiative</i>	<i>MM/YYYY</i>	<i>List requirements from departments/ functions within the organization (i.e., fundraising, training, HR, evaluation, etc.) needed to achieve each objective</i>
<b>Inventory and Assess Current Landscape of MESA Partnership(s)</b>	<p>Develop partnership survey</p> <p>Administer survey to all MESA Centers</p> <p>Compile survey results</p> <p>Analyze survey, identifying different partnership trends across segments; and identifying cross-cutting themes with other committees.</p> <p>Disseminate and share survey results and analysis with other work teams (via Basecamp)</p>	<p>Partnerships Work team</p> <p>Partnerships Work Team/Centers</p> <p>Partnerships Work Team</p> <p>Partnerships Work Team/Evaluation Coordinator (technical services); ongoing process based on assignments (tbd)</p> <p>Partnerships Work Team</p>	<p>April 2014 (COMPLETED)</p> <p>May 11, 2014 (COMPLETED)</p> <p>May 15, 2014 (COMPLETED)</p> <p>June 30, 2014 (IN PROGRESS)</p> <p>July 7, 2014</p>	<p>Partnerships Committee (staff time)</p> <p>Technical Support (In-Kind) - from UCSB &amp; Center Director Time (In-Kind)</p> <p>Technical Support (In-Kind) - from UCSB</p> <p>Partnerships Committee initial review time (In-Kind); Education Partnerships; evaluation coordinator (in the future).</p>



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<p><b>Define and Identify Best Practices for Successful MESA Partnership(s)</b>.</p>	<p>Analyze survey and utilize for identifying definitions of successful partnerships; and identify successful partnerships for replication within and across segments.</p> <p>Disseminate initial findings inviting Director/Regional Alliances (?) feedback.</p> <p>Revisit Regional Alliances goals/purpose/ scope.</p>	<p>Partnerships Work Team</p> <p>SWO/Centers</p> <p>Partnership Team</p> <p>Leads (by segment)/</p>	<p>July 2014</p> <p>Fall Directors Meetings</p>	<p>Resource Development Team</p> <p>Regional Alliances Sub-Committee</p> <p>Regional Alliances Sub-Committee</p>
<p><b>Identify strategies for maintaining, enhancing and strengthening partnership(s) at all levels</b></p>	<p>Develop MESA Partnership Development Plan that includes an assortment of strategies at two levels – statewide &amp; locally aligned.</p> <p>Compile and create partnership tools across centers (e.g. MOU/formal agreement templates, etc.)</p>	<p>Partnerships Committee</p> <p>Partnerships Committee</p>	<p>Preliminary Plan reviewed at Fall Director’s mtgs</p> <p>- Final Plan – December 2014</p> <p>Include as part of Final Plan December 2014 (will need continuous updating)</p>	<p>Resource Development/ Communications/ Research &amp; Evaluation Committees (jointly)</p> <p>Resource Development/ Communications/ Research &amp; Evaluation Committees (joint)</p>

## APPENDIX E

### Initiative #: MESA Research and Evaluation Plan

#### 1. Related Strategic Priority

*Strategic Priority Area I: Overall Program Enhancements*

*(Objective I.A.5): Make the program's centralized database system operational to allow improved collection of MESA student data and to track student progress over time*

*Strategic Priority Area IV: Management Operations and Implementation at State, Regional and Local Levels*

*(Objective IV.H.1): Support the capacity of all education segments to conduct timely and relevant program research and evaluation*

**Accomplished through Research and Evaluation Work Team priorities:**

#1: Crafting program assessment questions (that is, what we want to know about program performance), and the data elements necessary to answer those questions.

#2: Designing a robust data collection system that will answer these questions, as well as meet the needs of MESA's diverse audiences.

#3: Creating a system of standardized and ad-hoc data reports that provide useful information for programmatic needs

#4: Planning for Independent evaluations of MESA on a regular basis (every 3-5 years).

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### Objectives:

Research and evaluation in MESA identifies appropriate methods and processes for measuring the effectiveness of MESA. In order to do so four priority areas were identified as being necessary to accomplish this mission. The first priority was to identify the appropriate assessment questions for each MESA component (MSP, MEP, and M CCP). In order to do so, we examined the unique set of programmatic efforts at each component and also mapped those across components to develop specific and sequential program outcomes. The second priority was to determine what data are needed to answer these MESA assessment questions. In order to do so, we mapped these required data with our current data collection process and determined what processes were sufficient and which needed improvement. The third priority was to create a system of standardized data reports that would provide analysis of the collected data. In order to do so, we determined what types of reports were necessary for program components, regional centers, higher education segments, and statewide needs. The fourth priority was to identify a plan to do independent evaluations of MESA.

*This project will enhance the existing central database to allow improved collection of MESA student data and to track student progress over time and support the capacity of all education segments to conduct timely and relevant program research and evaluation.*

### 3. Team

<b>Initiative lead:</b>	<p><i>Oscar Porter, Executive Director, MESA/Oakland</i></p> <p><i>Ravinder Singh, Director, Information Management and Analytics, Education Partnerships, UCOP</i></p>
<b>Team members:</b>	<p><i>Virginia Estrella, M CCP, Santa Barbara City College</i></p> <p><i>Carlos Gonzalez., M CCP, UC Riverside</i></p> <p><i>Justin Ilumin, MESA Statewide Office</i></p> <p><i>Saba Johannes Reda, MSP, CSU Long Beach</i></p> <p><i>Gisela Spieler Persad, M CCP, Rio Hondo College</i></p> <p><i>Lydia Zendejas, MEP, UC Santa Cruz</i></p>
<b>Proposed start date:</b>	<i>07/01/2014</i>
<b>Proposed end date:</b>	<i>06/30/2016</i>

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**4. Resources Required**

<p><b>Financial and other resource implications:</b></p>	<ul style="list-style-type: none"> <li><b>Personnel</b> for maintaining data stewardship and analytics-N.B. current one-person unit requires two additional staff (senior analyst, database coordinator.)</li> <li><b>Data Systems</b> for data collection and storage</li> <li><b>Funding</b> for creating local data collection instruments and systems and supporting external evaluation to validate program efficacy and effect</li> </ul>
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**5. Initiative Work Plans and Interdependencies**

Objectives	Outcomes	Lead	Due Date / Milestones	Interdependencies
List by objectives for initiative in chronological order of estimated completion	List the expected outcomes for each objective	Designate the person who will own initiative	MM/YYYY	List requirements from departments/ functions within the organization (i.e., fundraising, training, HR, evaluation, etc.) needed to achieve each objective
Craft appropriate program assessment questions	<p>A. Each program unit will have a set of assessment questions that will be answered annually to describe program demographics</p> <p>B. Each program will be able to track student characteristics and outcomes over time to inform program formative assessment</p> <p>C. Standard assessments and ad hoc reporting will be available for the Statewide Office, regional alliances and individual centers</p>	A.-C MESA Statewide Office in collaboration with the research and evaluation work group	<p>07/2014</p> <p>09/2015</p> <p>07/2016</p>	<p>Original questions developed by the R&amp;E working group (see Appendix), with biennial updates by R&amp;E working group</p> <p>B-C. Remaining pieces of the MESA Statewide database must be completed (Survey, Reports, add MEP, add MCCP) and operational. MESA centers must see that all required data from center is entered into MESA SW database. UCOP will supply linkages to other education systems' corporate databases and external database like Student Clearinghouse and College Board</p>
Build and enhance a centralized data collection system	A single, central database housing demographic, performance, and activity data is in place	MESA Statewide Office in consultation with education	12/2014	Requires the completion of the development for surveys phase of database by ITS, testing by ITS and

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	<p>Tracking of students' education histories and performance will be possible through links to other organizations' data systems (e.g. UC, CSU, CCCCCO corporate databases, National Student Clearinghouse database, College Board database, TES)</p>	<p>segments</p>	<p>06/2016</p>	<p>MESA, and release and use by MESA program centers          Requires completion of data-sharing agreements by Education Partnerships with other education segments, development of download capability for MESA database by ITS, Education Partnerships and MESA and agreements with external agencies</p>
<p>Create standardized data reports</p>	<p>A. Improved reporting to state, campus, and other stakeholders will be timely and consistent over time</p> <p>B. As much as is practical, data elements reported will be commonly defined across the unit of measurement, i.e. statewide, center, region to allow for reasonable comparisons</p> <p>C. Standardized reports will be available on demand for the requesting party</p> <p>D. The ability to create ad hoc reports will be available through the database for statewide staff and center directors</p>	<p>A. MESA Statewide staff</p> <p>MESA Statewide Office staff, MESA Center Directors and staff with support from Education Partnerships</p> <p>MESA Statewide Office staff and UCOP ITS unit</p>	<p>09/2015</p> <p>03/2015</p>	<p>Success is dependent upon center data being submitted on time, ability to draw data from other segments and agencies being in place and the MESA Statewide Office having and experienced analyst in place to prepare the reports</p> <p>All parties with access to data included in the data base should be working from common definitions of common elements whenever possible for items unique to a particular program unit, common definitions across each unit must be applied. To accomplish this result, MESA Statewide, centers and sources of external data such as Education Partnerships and UC Institutional Research must consult often and reach agreement on definitions before data are collected.</p> <p>The database will produce the reports. Therefore the Reports section of the data base must be completed. The R&amp;E ad hoc committee will continue to recommend the most appropriate reports for center use.</p> <p>A version of a pivot table with the capacity to select data elements as needed for comparisons or counts must be distributed by MESA Statewide as an adjunct to the data base. Center may load their data directly into the pivot table to create counts and comparisons. The pivot table has been created already.</p>

## APPENDIX F

### Overarching Research Questions for MSP, M CCP and MEP

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<b>MESA MSP Overarching Program Assessment questions</b>	
<b>Area</b>	<b>Question/Concept</b>
<b>Indicators of success for being on track to STEM majors</b>	<p>What are MSP students’ attitudes towards math and science? (Pre- and post-test of all MSP students in 7<sup>th</sup> and 8<sup>th</sup> grade)</p> <p>How do MSP students’ math and science grades compare with non-MSP students with similar demographics at each MSP middle school (pending approval from district to get grades for non-MSP students)?</p> <p>What percent of MSP students take pre-calculus, calculus in high school?</p> <p>What is the percent of students who take AP calculus, AP Physics, etc...</p> <p>Does MESA lead students to take more rigorous “a-g” coursework?</p> <p>Do MESA students take advanced mathematics and laboratory science courses?</p> <p>Do MESA students perform better in school than their non-MESA counterparts?</p> <p>Are student’s perceptions and attitudes towards learning affected by participation in MESA?</p> <p>How many 1st generation college students is MESA producing?</p> <p>Is MESA causing students to enroll in higher education institutions upon graduation?</p> <p>Are pre-college MESA students more likely to ultimately complete a four year and/or graduate STEM-based program?</p> <p>How many MSP students end up picking a STEM major in college?</p> <p>How many years of MSP involvement increases MSP students’ ability to choose STEM major?</p>
<b>Retention of MSP students at each grade level</b>	<p>What percent of MSP middle students go to high schools that have a MESA program?</p> <p>How many percent of MSP middle school students are admitted to STEM focused high schools?</p>

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	<p>What is the percentage of MSP students who go to four-year universities where there are MEPs?</p> <p>What is the percentage of MSP students who go to MCCPs?</p>
<b>Internal Program Improvement</b>	<p>Which MESA Day projects did a student participate in? Why?</p> <p>What math/science concept did a student learn from each MESA day projects that he/she didn't know before?</p> <p>Did MESA Day projects help students build confidence in math/science? How?</p> <p>Did MESA Day projects help students choose STEM majors?</p> <p>What academic improvements do MESA Advisors observe for MSP students after being in MSP for one year?</p> <p>What type of behavior change do MESA Advisors observe for MSP students after being in MSP for one year?</p>



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**MESA M CCP Overarching Program Assessment Questions**

Area	Question
<p><b>Indicators of Success toward STEM Degree</b></p>	<p>How many students are annually served by M CCP? How many underrepresented minorities are served by M CCP annually?</p> <p>What percent of M CCP students graduate with BS/BA degrees in STEM? How does this compare to (similar) non-M CCP students?</p> <p>What percent of M CCP transfer students graduate with a non-STEM degree? How does this compare to (similar) non-M CCP students?</p> <p>What percent of each M CCP cohort is accepted to a 4-year institution in a STEM field? (May or may not attend for financial reasons?)</p> <p>What percent of each M CCP cohort transfers to a 4-year institution?</p> <p>How long do first-time freshmen who join M CCP take to graduate in STEM? How does this compare to similar non-M CCP students?</p> <p>How do fall to fall persistence rates for M CCP students compare to non-M CCP students?</p>
<p><b>Indicators of Increased Student Success</b></p>	<p>What percent of M CCP Students graduate with an AA/AS?</p> <p>What percent of M CCP students stay in STEM through transfer compared to non-M CCP students?</p> <p>What percent of a M CCP student’s cohort finishes all major preparation at his/her M CCP? (May not be applicable to all colleges)</p> <p>What are the success rates (retention rates) for M CCP students compared to non-M CCP, albeit M CCP-eligible, students?</p> <p>Which program components are most effective (student satisfaction, grades, efficacy): AEWs, educational plans, study centers, etc.?</p>

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MESA MEP Overarching Program Assessment questions	
Area	Questions
<b>Indicators of Success toward STEM Degree</b>	<p>What is the percentage of MEP students who persist and graduate with a STEM degree?</p> <p>Compare MEP students graduation rate with non-MEP students' graduation rate by ethnicity or URM status</p> <p>How many MEP students change their majors to non-STEM fields?</p> <p>What is the percentage of MEP graduates who secure engineering jobs during their senior year?</p> <p>What percentage of MEP students go to graduate school?</p> <p>Do MEP students go straight to industry or graduate school?</p>
<b>Indicators of Increased Student Success</b>	<p>How many MEP students had exposure to MESA in middle/high school/MCCPs? (Survey all incoming MEP students if possible during orientation or summer programs.)</p> <p>What is the average GPA of MEP students who are admitted to four-year universities?</p> <p>What is the percentage of MEP students who have an internship?</p> <p>How many of the MEP students join MAES, SHPE and NSBE and other engineering professional organizations as freshmen? Assess whether students have attended regional or national conferences or assumed leadership roles in these organizations.</p> <p>What is the percentage of MEP students who utilize the study center?</p> <p>What is the percentage of MEP students who received AEW/ tutoring (math, science, etc...)?</p> <p>What percentage of MEP students obtain research experience?</p>
<b>Program Improvement</b>	<p>What percentage of MEP students are ever on academic probation?</p>

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What are the dropout rates of MESA students within the program?

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What are the dropout rates of MESA students within STEM fields?

What are the eligibility criteria of the MEP? When do they accept new students?

Are AEWs offered?

What do tutoring services look like? How many tutors? How much of their budget is expended on this?

Does the center have a study center that is accessible 24 hours a day?

Does the center have a textbook lending library?

Does the center have a mentoring program?

Does the center have an active advisory board?