

# New Frontiers/MCC Joint Task Force Final Report

## ABSTRACT

*The New Frontiers/MCC Joint Task Force uncovered multiple opportunities to improve both the transparency and effectiveness of the partnership.*

*While initially convened to address fiscal issues, the Joint Task Force also took the opportunity to identify a number of related operational concerns. New practices have already been implemented that address a number of these issues, such as a new enrollment system and clearer operating policies for NF instructors.*

*Among the outcomes of the Joint Task Force's work are the following:*

- New Practice - New Frontiers will provide newly approved budget submission from the new council in November 2013 by March 1st 2014 to MCC Fiscal to be put into the CFSs system for the new fiscal year 2014.
- Monthly Fiscal Report -Reconciliation of fiscal process will continue for the NFF council - MCC team is working together to create a report for the NFF Council.
- New Practice - Transfer Funds twice a year from NF to MCC Continuing & Community Education Account - Fall, October 1 and Spring, February 1. Fiscal Report –
- Important metric for New Frontiers is Cash Flow - John Moll to provide Report of Actual Cash Flow to NF for July 1 and then the team will show balance each month in the report to council.
- New Practice - Beginning July 1, 2013 a New Frontiers bin will be provided and mail will be charged directly to New Frontiers from IKON.
- Fiscal Training - New Council training orientation in Mid November to NF Council and committee chair Members on Policies & Procedures and Fiscal Processes and specific fiscal training
- Fiscal Access & Training – Treasurer and President have Read Only Access on Web Financials.

*The Joint Task Force has resulted in a new level of collaborative dialogue between New Frontiers and Mesa Community College that can and should be extended for continuous improvement and the continued enhancement of this partnership.*

## 1) History and formation of JTF

- a) The concept for New Frontiers for Lifelong Learning at Mesa Community College grew from meetings and discussions among College administrators and members of the community in the Fall of 1994 at the Mesa Community College Advisory Council for Lifelong Learning and Retired Professionals.
- b) In the Spring of 1995, the 70 member New Frontiers charter group was organized with the support of MCC's Center for Community Education. Details for a Memo of

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Understanding with MCC were finalized. Seed money was provided by MCC for the initial start-up with the agreement that a percentage of each New Frontiers student registration would be returned to MCC.

- c) New Frontiers held their first open house in September 1995 and had 70 charter members. New Frontiers Charter members met to elect NF officers at the first annual meeting of the group. By-Laws were accepted and submitted to MCC. The Memo of Understanding (MOU) was agreed on and signed.
- d) By 2013, NF had 437 members enrolled. There were 64 classes offered at the three MCC campuses as well as at the Mesa Active Adult Center and other locations in the community. New Frontiers members supported MCC students with annual scholarships of \$3,000, and as guides during peak registration periods.
- e) New Frontiers has been sponsored and supported by Mesa Community College for the past 19 years through the Center for Community Education; the Continuing/Community Education Department; and today the Center for Workforce Development and Continuing Education. There have been seven MCC liaisons appointed by the College over the years to support and assist New Frontiers and help it grow into the relevant and supportive organization it is today. New Frontiers is an important part of the mission of MCC.
- f) The Joint Task Force (JTF) was formed in the early spring of 2013 by MCC Provost Patrick Burkhart and New Frontiers President Bruce Reid to address several concerns in the operations of New Frontiers in the area of financial policies and procedures. Gary Kleemann (NF) and Patrick Burkhart (MCC) were asked to co-chair the JTF.

## 2) Membership of JTF

- a) The Task Force was made up of six New Frontiers members and six MCC staff members. The membership list may be found in Appendix A.

## 3) JTF Charge

- a) The first meeting of the JTF was held March 4, 2013 where the conveners of the JTF gave the JTF its charge. (See Appendix B)

## 4) Process of Problem Identification

- a) On February 11, 2013, Gary Kleemann sent an email to all members of the New Frontiers Governing Council requesting input from them for consideration by the JTF. A

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similar email was also sent to the most recent four past presidents of New Frontiers. The email and the responses may be found in Appendix C.

- b) During this same timeframe, Patrick Burkhart requested input from MCC staff.
- c) The New Frontiers/Mesa Community College Joint Task Force on Financial Policies and Procedures met face to face four times and conducted many online conversations.
  - i) The first meeting (March 4, 2013) was designed to begin the exploration of the issues and to begin the process of problem definition. At the first meeting of the JTF there was a discussion about the process to be followed to identify the issues. The co-chairs presented a proposed outline to help clearly identify problems (See Appendix D).

The JTF then developed teams to research each of the issues identified in the outline. Each team had both New Frontiers and MCC members.

- (1) The important documents establishing the relationship between MCC and New Frontiers were identified as the Memo of Understanding between MCC and New Frontiers (see Appendix E), the Operating Procedures (bylaws) of New Frontiers (see Appendix F) and the Mission Statement of Mesa Community College (see Appendix G).
  - (2) Another key document for the operations of New Frontiers is the Council Operating Manual updated each year by the Governing Council and President of New Frontiers. See appendix H for the 2012 – 2013 manual.
  - ii) The objective for the second meeting of the Task Force (March 18, 2013) was to arrive at a common understanding of the history and evolution of the NFLL-MCC relationship and to understand the “as is” model. The work teams presented the results of their work. It may be found in Appendix I) Patrick Burkhart presented a PowerPoint presentation (see appendix J) summarizing the information from the first meeting. Teams were assigned to develop problem statements. The charge to the Task Force was expanded to include all areas of the relationship between New Frontiers and MCC – not just financial issues.
- 5) Problems Identified
- a) Seventy-four different problem statements were developed. The third meeting (April 1, 2013) was devoted to clustering the 74 problem statements (See appendix K for a complete listing) that had been developed by the JTF members into areas that could be addressed. Eight issue clusters were identified:

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- (1) Training issues
  - (2) Process issues
  - (3) New Frontiers cultural issues
  - (4) Communication issues
  - (5) Financial issues
  - (6) Relationship issues
  - (7) Resource issues
  - (8) Policy and goal issues (See appendix L for a complete listing of each cluster)
- b) The fourth meeting (April 15, 2013) was for the purpose of developing solution statements for the problems identified. This was to be the last meeting of the JTF before several members were to leave the area for the summer. Several JTF members submitted written solution statements. They may be found in appendix M. A list of action items – Immediate, Intermediate and Next 12 months was developed (see appendix N).
- c) A result of the work of Joint Task Force has been the identification of several challenging issues that should be addressed by several participants. The state of the relationship between New Frontiers and Mesa Community College is good but needs to be strengthened.
- 6) Actions taken by MCC
- a) The dues paid by New Frontiers members to MCC have been raised from \$20 per member to \$35 per member effective Fall 2013.
  - b) MCC staff will no longer be involved or handle NF student registrations for classes. MCC staff will continue to handle NF student fee payments.
  - c) MCC staff will schedule room assignments for classes but will not make any changes or adjustments after the classroom has been scheduled.
  - d) MCC has reduced the staff time for the reporting of NF financial information to NF.
  - e) MCC will transfer fee income from the NF account to the College twice a year instead of once a year.
  - f) MCC has developed a plan to track and charge NF for postal expenses.

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- 7) Actions taken by NF
  - a) NF has developed and implemented an online student registration process for its members.
  - b) NF Governing Council agreed to the increase in student fees.
  - c) NF has agreed to change its budget process to more closely align with the College's.
  - d) NF is in the process of developing and implementing new training and orientation for committee chairs and council.
  - e) NF paid MCC \$3,000 in the 2012-2013 budget year to cover postage costs.
  - f) Task Force co-chair Gary Kleemann addressed the New Frontiers General Membership about the work of the Task Force. His presentation may be found in Appendix O.
- 8) Issues yet to be addressed and Next Steps
  - a) A result of the work of Joint Task Force has been the identification of several issues that should be addressed by several participants. The JTF realizes that its work is completed.
  - b) The state of the relationship between New Frontiers and Mesa Community College is good but needs to be strengthened.
  - c) The JTF recommends that small working groups with representatives from the Provost of MCC, from New Frontiers Governing Council, from the MCC Chief Fiscal Officer and from such other stakeholders as may be appropriate be formed to work on developing Solution Statements for the Problem Statements still outstanding and on how to best move forward towards the end of strengthening the relationships and improving the processes and procedures of the parties.
  - d) MCC recently announced that due to reorganization at the District level, the Office of Workforce Development and Community Education at MCC will lose two key staff members and will be reorganized with a new mission. This will undoubtedly impact New Frontiers.

### Acknowledgements

There are so many people to thank for all of their hard work on this Task Force it is hard to know where to begin.

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We thank the members of the Task Force who gave so unselfishly of their time and talents. The effort of each Task Force member was remarkable and very much appreciated.

We would like to thank the staff of MCC and the District for their time and efforts on behalf of the New Frontiers and MCC partnership.

We thank the Office of Workforce Development and Community Education, for their continued support of New Frontiers. We especially thank Michelle Chambers and Neva Hansen for their support of the work of the Task Force. We thank the New Frontiers Governing Council for supporting the work of the Task Force.