

# ADMINISTRATIVE SERVICES, STUDENT SERVICES AND PRESIDENT'S CLUSTER ANNUAL PROGRAM PLAN WORKSHEET

**Program:** Advancement      **Planning Year:** 2017-18      **Last Year CPPR Completed:** 2015

**Unit:** Advancement      **Cluster:** President's

**Please complete the following information. Please note that responses are not required for all elements of this document.**

## I. GENERAL PROGRAM INFORMATION

A. Describe changes to program mission, if applicable.

N/A

B. Describe any changes in primary relationships, internal and external, to the District.

N/A

C. List any changes to program service, including changes and improvements, since last year, if applicable.

Restructuring of the Advancement team and moving the accounting functions from the district payroll has strengthened staffing and eased the fiscal burden of the foundation staff from the district's general fund. The results support the ongoing staffing costs and added an additional \$25,000 to the annual budget for paid advertising/marketing to support enrollment.

The foundation has changed investment managers via an RFP process to improve the financial health of our endowment and investments. The focus is to maintain the health of the endowment returns for the 300+ endowment funds.

Staffing changes in IT have slowed the website launch (especially Areas of Study) and staffing gaps in the Foundation negatively impacted relationship-building opportunities. The website launch has been delayed by one month. The foundation has postponed launching new alumni engagement strategies as we hired a new programs coordinator.

D. List changes to program in the last year in reference to relevant statutory authority/program regulation and related compliance issues, if any.

N/A

## II. ANNUAL PROGRAM SUPPORT OF DISTRICT'S MISSION STATEMENT, INSTITUTIONAL GOALS, INSTITUTIONAL OBJECTIVES, AND/OR INSTITUTIONAL LEARNING OUTCOMES

A. Provide updates, if any, in how your program addresses or helps to achieve the District's Mission Statement in the last year.

The Advancement program, comprised of the Foundation, Marketing and Communications, and Grants Offices, supports the mission of the district by pursuing additional resources and communicating with our community to increase access and excellence at Cuesta College.

- B. Provide updates, if any, to how your program addresses or helps to achieve the District's Institutional Goals and Objectives, and/or operational planning initiatives in the last year.

Strategic Plan 2014-2017

Institutional Goal 1:

Improved Communications: Redesigned website across platforms launch should be completed by the end of March 2017. Strategic marketing for enrollment continues building up to summer 2017 and launching new(er) programs such as Emeritus and Ag Programs. New platform for President's newsletter and alumni e-communications launched.

Increased Fundraising: Cuesta Fund increased target to \$250 to support Foundation grants for student success – tutors, mental health support, book lending, etc. The foundation initiated North County naming moves, additional tech support for new buildings, and working on scholarships.

Continued work on grant submissions awaiting responses and tracking the Basic Skills work by the college.

Institutional Goal 2

Improved Communications: Targeting marketing to high school and reentry audiences with paid and free media build enrollment. Additional funds were made available for marketing's purchase power. A new student intern position create new and improved videos as part of the overall marketing strategy (and 3SP).

Increased Fundraising: Continue to support the Promise program by funding the first year for over 700 students and marketing the program to the community. The second year of the Promise fundraising efforts launched to increase access via donors and grants.

Institutional Goal 4:

Improved Communications: When the website launches, the planning and accreditation websites will be split, more clearly define planning references (Lisa Gray in President's Office is lead).

Institutional Goal 5:

Improved Communications: District Dialogues keep the flow of communication open with our K-12 partners and community leaders. Increased of mailing and e-communications on college priorities.

Increased Fundraising: Working with Cal Poly on grant programs for transfer scholarships via grants.

### III. ANNUAL MEASUREMENTS, ANALYSIS AND IMPROVEMENTS

Programs are often impacted by institutional or other organizational change. Please review program-relevant institutional data sources, such as institutional enrollment trends, which along with some other relevant program data, is available on the [SLOCCCD Institutional Research and Assessment website](#). Other organizational or departmental measurements may provide useful information for planning in your program; please describe those measurements and the data below.

#### A. Data Summary

- Describe data collection tool(s) used.
  - 2015-16 Annual Report
  - 2015-16 Voluntary Support of Education Survey results for Cuesta College – for the purposes of comparing fundraising on a national scale
  - 2015-16 Annual Audit of the Cuesta College Foundation
  - Marketing Advertising Campaign, and Spectrum electronic media data
  - Marketing Website on Press Releases and Publications
  - 2015-16 Annual Report of Grants to Board of Trustees
  - Constant Contact Tracking of E-communications (in Donor Perfect system) opens and click-thru rates
- Include updates to program data results from the previous year, if any.
  - Based on the Foundation’s financial statements and VSE report:
    - Overall cash and in-kind contributions were down by almost 8%, primarily from trusts (estate plans) and in-kind gifts.
    - Expenses were up over 8% due to increased support for college programs (primarily ECE building and the Promise scholarship) and increased staffing costs, staffing costs were offset by lower operating costs.
    - Even with the abovementioned shifts, the total liabilities and assets remained fairly unchanged.
    - Giving from alumni, parents and foundations increased while gift totals from ‘other individuals’, corporations and other organizations decreased.
    - Annual Fund unrestricted and restricted endowment giving increased.
    - Marketing’s data analysis of the 2016 campaign revealed that more community members recall the brand from radio than previously thought, marketing on the web is stronger for Cuesta than other brands, work needs to continue on cohorts such as the 24-40 and 50+ age ranges.
    - Some marketing work will continue to support summer school 2017, and can’t be evaluated at this time.
    - E-communications are most popular (clicked) when they involve bond updates, where community members have a vested interest.
    - Meetings with IT and Academic Affairs indicate that an on-line catalog is not feasible at this time, and Marketing is updating that strategy.

B. Data Interpretation:

- Describe results from previous improvement efforts to the program based on institutional or departmental changes.
  - Additional resources have been brought in by the Grants Office in support of student success.
  - The Cuesta Fund's progress continues to build the alumni and parent giving as well as Business Partners.
  - The Legacy Campaign has yielded new donors and will be evaluated after the April deadline.
  - Data results from paid advertising is readily available for tracking, analysis and improvement by the Marketing Coordinator to target outreach.
- Identify areas if any that may need improvement for program quality and growth.
  - Additional fundraisers are needed to reach all those who have an interest in supporting Cuesta (major gifts officer). This may also include a part-time phonathon lead.
  - Broadening marketing staff via a return of a manager, additional student interns and looking at making the graphic designer position 100% are all likely necessary to fulfill current and future workloads.
  - Additional staff will require more spaces, as our modular is limited.
  - Marketing needs updated video production equipment and technology to fully leverage a variety of media.
- Recommend any changes and updates to program based on the analysis above. For elements that require funding, complete the Resource Plan Worksheets.

See above descriptions and worksheets.

**IV. ANNUAL PROGRAM OUTCOMES (ASOs AND SSOs), ASSESSMENT AND IMPROVEMENTS**

Your program has established either Administrative Service Outcomes or Student Service Outcomes. Those outcomes are assessed and tracked in the Course or Program Assessment Summary. Review CPAS documents for ASO or SSO assessment results for program outcomes.

A. Describe any results from improvement efforts arising from ASO or SSO assessment in the last year.

See department improvements.

B. Recommend changes and updates to program based on assessment of program outcomes. For elements that require funding, complete the Resource Plan Worksheets

and review the Resource Allocation Rubric.

## **ANTICIPATED SERVICE CHALLENGES/CHANGES**

Provide a brief description of challenges or changes anticipated in the next year and any needs that have emerged as a consequence.

### **Suggested Elements:**

- A. Regulatory changes  
The new CCCCCO Auxiliary Organizations Manual coming in summer 2017 may lead to some shifts in the district/foundation relationship
- B. Internal and external organizational changes  
Moving to alternative investments will likely lead to changes in our foundation audit, including cost.
- C. Student and staff demographic changes
- D. Community economic changes – workforce demands
- E. Role of technology for information, service delivery and data retrieval
- F. Providing service to multiple off-campus sites
- G. Anticipated staffing changes/retirements

## **V. OVERALL BUDGET IMPLICATIONS**

Provide a brief description of the immediate budget request(s) made in your Resource Plan (formerly called the Unit Plan). These elements will be reflected in the District planning and budget process.

### **Elements:**

- A. Personnel
- B. Equipment/furniture (other than technology)
- C. Technology
- D. Facilities

See worksheets.

## **SIGNATURE PAGE**

Director(s), Manager(s), and/or Staff Associated with the Program

**Student Services and Administrative Services Programs: All full-time director(s), managers, faculty and/or classified staff in the program must sign this form.**

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Division Chair/Director Name	Signature	Date
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