ANNUAL PROGRAM PLANNING WORKSHEET (APPW)

Program: Marketing and Foundation **Planning Year:** 2015-2016 **Last Year CPPR Completed:** 2010-2015

Unit: Advancement   **Cluster:** President   **Next Scheduled CPPR:** 2015-2016

Narrative: APPW

Use the following narrative outline and be brief and concise:

I.   Program Support of District Mission, Institutional Goals, Institutional Objectives, and/or Institutional Learning Outcomes: Identify how your program, within the past year, has helped the District achieve its Institutional Goals and Objectives, and/or how it has helped students achieve specific Institutional Learning Outcomes (ILOs), and provide data or evidence that demonstrates the progress. Please refer back to the Planning Documents section of this document.

So far in 2014-15, the Advancement area focused on outreach increasing enrollment and supporting the district's facilities needs. Two new initiatives augmented the regular activities associated with the Advancement Office's work.

First, the Advancement team worked on developing the viability and then marketing of the second fee-free semester for the Cuesta Promise. The now yearlong scholarship assists in Institutional Goals 1.6 (retention), 2.2 (high school capture rate) and Enrollment Plan Initiative 4 (persistence) by removing funding as an access barrier for newly graduated local high school students. The Foundation spearheaded a new Senior Promise Day to further market the opportunity. The college-wide efforts in implementing this plan later became one of the district's seven recommendations by the ACCJC Visiting Team.

Second, the Foundation and its volunteer board strongly supported the district's bond efforts, as seen by it's strong participation by both board and volunteer staff members and the Foundation's lead gift to the campaign. The Foundation Board and Advancement staff (off duty) were great advocates of the bond and the positive results in November addressed many needs in the Facilities Master Plan.

Additional activities, such as new naming opportunities, new social media outlets, mini campaigns, and other resource development activities can also be found in the Board of Trustees quarterly reports to date:

November 2014 and February 2015

In the coming months, the Advancement team will add the Director of Grants Development to broaden the ability to bring in resources form other opportunities, launch the Area of Study on the cuesta.edu website to assist enrollment, a new scholarship partnership with KSBY for brand

awareness, and test a new prospect management database to identify potential donors and find lost alumni.

II.   Program Data Analysis and Program-Specific Measurements
This should be an update on the data analysis from the last CPPR

Program data is available on the [SLOCCCD Institutional Research and Assessment Program Review Data Dashboard site](#). The Dashboard components are hyper linked below; just click on "enrollment" or other category below.

A.   [Enrollment (Insert Data Chart)](#)
Please embed the data chart and then provide analysis of the factors affecting your program's overall enrollment, paying particular attention to recent changes. Please also comment on your program's data and how it compares to the overall college data.

N/A

B.   [Student Demand (Fill Rate) (Insert Data Chart)](#)
Please embed the data chart and then provide analysis of the factors affecting your program's overall fill rate, paying particular attention to recent changes. Please also comment on your program's data and how it compares to the overall college data.

N/A

C.   [Efficiency (FTES/FTEF) (Insert Data Chart)](#)
Please embed the data chart and then analyze the factors affecting your program's FTES/FTEF, paying particular attention to recent changes. Please also comment on your program's data related to the overall college data.

N/A

D.   [Student Success – Course Completion (Insert Data Charts)](#)
Please embed the data charts and then provide analysis of the factors affecting your program's overall successful course completion percentage, paying particular attention to recent changes. Consider how modality impacts students' success in your program by reviewing [Course Completion by Modality](#). Please also comment on your program's data and how it compares to the overall college data.

N/A

E.   [Degrees and Certificates Awarded (Insert Data Chart)](#)
Please embed the data chart and then analyze the factors affecting your program's rate of

awarding degrees and certificates, paying particular attention to recent changes. Please also comment on your program's data related to the overall college data.

N/A

F.   Other Relevant Program Data (optional)

Please provide any other data you think is relevant to your program such as State or National certification exam results, or other data unique to your program.

Advancement provides information for the Foundation to the Voluntary Support for Education, a national survey of college and university advancement activities.

Foundation Annual Report 2013-2014 – increases to fundraising

Foundation Audit Report 2013-2014 – evidence of propoer non-profit processes

III. Program Outcomes Assessment and Improvements:

A.   Attach or insert the assessment cycle calendar for your program.
The assessment of CPAS' occurs after the Foundation audit is completed in November. This Ensures that there is a clean review of all areas of the Foundation and Marketing areas. Resulting reviews are then incorporated in the next IPPR cycle.

B.   Attach or insert the most recent program-level Course or Program Assessment Summary (CPAS) for each of the degrees/certificates in your program or the Student Services Student Learning Outcomes Assessment Report (SSSLOAR).

(next page)

Course or Program Assessment Summary

Division: *President* **Program:** *Advancement/Foundation* **Date:** *12/18/2014*

Director involved with the assessment and analysis: *Shannon Hill (Admin)*
Course-to-program outcome mapping document** is completed **N/A**

1	Administrative Outcome Statements	Advancement/Foundation Office will increase effective communications with our constituents resulting in positive brand awareness.
2	Assessment Methods Plan (identify assessment instruments, scoring rubrics, SLO mapping diagrams)	Marketing and Foundation together have working diligently on outreach associated with three areas in 2014: 1. Prepare messaging and outreach for Cuesta's facilities needs: The resulting positive voter response is the best indicator of success in the efforts of sharing the needs of Cuesta's facilities. 2. Marketing for general enrollment: Although enrollment continues to decline, marketing is working on additional outreach via: e-media (mobile sites), movie theater promotions, local scholarship giveaway event, and adding social media such as Instagram to our toolbox 3. Marketing for the Promise and expansion for the program: The Promise is seeing strong application numbers, however assessment will have to come next year for the change.
3	Assessment Administration Plan (date(s), sample size or selection of course sections, scoring procedures, etc.)	Non-bond educational outreach on the economic impact of Cuesta received positive feedback from the community. See the Cuesta You Tube Page for outreach pieces. Marketing The number of press releases, editorials increased year to year and the number of mentions in local media also increased as a result. The Foundation increased publications and supported the advertising of the Promise program. Purchase of a new tracking program, Meltwater, can now provide Cuesta with more quantitative results of media mentions, although the bond year is likely to be a high benchmark.
4	Assessment Results Summary (summarize Data)	Marketing and Foundation has improved the communications to our community with positive brand awareness. We will improve the website with Areas of Study, but also need to create a mobile-friendly site. Videos could not be made in-house, due to staff turn-over, as marketing did not have a permanent Marketing Coordinator this year.
5	Discussion of Assessment Procedure and Results, and Effectiveness of Previous Improvement Plans	The entire Marketing Team discusses outcomes at weekly meetings. Improvements will likely result in an RFP process for the marketing consultant/partner.
6	Recommended Changes & Plans for Implementation of Improvements	Advertising dollars continue to be needed to increase visibility and is still on the APPW top ten list.
7	Description or evidence of dialog among course or program-level faculty about assessment plan and results	Marketing meets weekly and the entire Advancement Team meets bi-monthly to discuss the work being done in the office. See A-Team minutes.

Course or Program Assessment Summary

Division: *President* **Program:** *Advancement/Foundation* **Date:** *12/18/2014*

Director involved with the assessment and analysis: *Shannon Hill (Admin)*

Course-to-program outcome mapping document** is completed **N/A___**

1	Administrative Outcome Statements	Advancement/Foundation will increase the amount of funds raised to meet the needs of the district.
2	Assessment Methods Plan (identify assessment instruments, scoring rubrics, SLO mapping diagrams)	Numbers pulled from Foundation databases and compiled by the Foundation Accountant and Account Technician report on fundraising benchmarks.
3	Assessment Administration Plan (date(s), sample size or selection of course sections, scoring procedures, etc.)	Review by staff and committees of the Foundation monthly, quarterly annual reports are used to track the numbers of donors and amount of giving. Additionally, another report is given to the Board of Trustees for review. The Executive Director for Advancement and the Director of Foundation Programs assess and review the data for operational updates.
4	Assessment Results Summary (summarize Data)	The Foundation total net assets increased in 2013 by $4.5 million to over $35 million. The gifts to the college remained steady at just under $2 million in the 2013-14 school year. The Foundation endowment is almost at $25 million, which rose significantly with the quasi-endowed Dovica/Promise gift.
5	Discussion of Assessment Procedure and Results, and Effectiveness of Previous Improvement Plans	Discussion of fundraising numbers took place at the Executive Committee and Development Committee meetings this summer. Specific assessment of the Foundation's involvement in the bond campaign and the Promise program were discussed at the September and November board meetings.
6	Recommended Changes & Plans for Implementation of Improvements	Additional resources will be target grant-seeking and major gift strategies. The Foundation will seek to hire a grant writer in support of these efforts.
7	Description or evidence of dialog among course or program-level faculty about assessment plan and results	The A-team meetings, Board meetings and Board committee meetings and the minutes of these meetings are where dialog occurs regarding results and assessment. Presentations made at the district's Board of Trustees monthly meetings also create a forum for dialog for the district and community.

Course or Program Assessment Summary

Division: *President*   **Program:** *Advancement/Foundation*   **Date:** *12/18/2014*

Faculty involved with the assessment and analysis: *Shannon Hill (Admin)*
Course-to-program outcome mapping document** is completed **N/A**

1	Administrative Outcome Statements	Advancement/Foundation Office will increase relationship-building opportunities with current and potential supporters of the district, including 'friend-raising' of alumni and stewardship of donors.
2	Assessment Methods Plan (identify assessment instruments, scoring rubrics, SLO mapping diagrams)	Data on alumni giving, communications and event participation is pulled from Foundation databases and compiled by the Foundation Coordinator in a report on alumni benchmarks for the Alumni Committee Chair. Pre-bond outreach also allowed for opportunities to reach out to certain constituent groups (such as retirees). The Foundation website was moved over into the cuesta.edu site in November.
3	Assessment Administration Plan (date(s), sample size or selection of course sections, scoring procedures, etc.)	Information is reported and reviewed monthly at Foundation Board or Executive Board meetings and at Alumni Committee meetings.
4	Assessment Results Summary (summarize Data)	The Honored Alumni program and alumni panel in Spring 2014 will be replaced by a combined Awards ceremony in 2015. The numbers of alumni giving continues to increase in spite of a delay in November 2014 in fundraising efforts.
5	Discussion of Assessment Procedure and Results, and Effectiveness of Previous Improvement Plans	Discussion of processes took place in Foundation Staff meetings, Executive Committee meetings and Alumni Committee meetings for input on improving alumni relations.
6	Recommended Changes & Plans for Implementation of Improvements	Improving the communication pieces for communications is needed. Organized volunteer engagement efforts need to be updated and implemented.
7	Description or evidence of dialog among course or program-level faculty about assessment plan and results	The A-team meetings, Board meetings and Board committee meetings and the minutes of these meetings are where dialog occurs regarding results and assessment. Presentations made at the district's Board of Trustees on a quarterly basis for programs also create a forum for dialog for the district and community.

Course or Program Assessment Summary

Division: *President* **Program:** *Advancement* **Date:** *12/18/2014*

Director involved with the assessment and analysis: *Shannon Hill (Admin)*
*Course-to-program outcome mapping document** is completed* **N/A**

1	Administrative Outcome Statements	Advancement/Foundation will increase the effectiveness of Advancement and Foundation programming through streamlined operations.
2	Assessment Methods Plan (identify assessment instruments, scoring rubrics, SLO mapping diagrams)	Assessment of our operations includes clean audits by a third party, accurate and timely entry and acknowledgement of donors, and employees following policies and procedures efficiently. The front desk did not have enough support to keep accounting and others from interruptions.
3	Assessment Administration Plan (date(s), sample size or selection of course sections, scoring procedures, etc.)	Audit was successful, and implementation of new practices (tracking of acknowledgement letters) going well. Need to remove shadow databases for accounting mailings. Brought in a work-study student, who has been effective.
4	Assessment Results Summary (summarize Data)	The 2013-2014 audit had no findings., resulting in a clean audit report. This year's accounting efforts were hampered by staffing challenges throughout 2014.
5	Discussion of Assessment Procedure and Results, and Effectiveness of Previous Improvement Plans	The audit was presented to the Foundation Board of Directors in November 2014. Notes from the monthly meetings between accounting and the Executive Director to review processes.
6	Recommended Changes & Plans for Implementation of Improvements	The accounting office will continue to review and implement timely acknowledgement and reporting of gifts. The Executive Director is tracking the timeliness of the process.
7	Description or evidence of dialog among course or program-level faculty about assessment plan and results	The Executive Director holds monthly meetings just with Accounting to review the plans for improvement.

C.   Summarize in one to two paragraphs program improvements that have been implemented since the last APPW or CPPR.

Many were mentioned above, but since the last APPW:

- Director of Grants has been funded
- Organized outreach efforts for the Promise Program and Bond (when appropriate)
- Improved communications with Instagram and Constant Contact
- Improved web presence anticipated with upcoming Areas of Study
- Broadening of Promise scholarship to on year, and addition of the Senior Promise Day event
- Anticipated addition of prospect database
- Marketing purchased a media-surveying tool to locate all mentions of Cuesta in traditional (news media) and non-traditional (blogs, social media) outlets
- The Foundation website has moved to cuesta.edu from the academic server

D.   Identify and describe any budget requests that are related to student learning outcomes assessment results or institutional objectives.

Budget requests were primarily related to additional marketing support to assist with enrollment target outreach. (Institutional Objective 2)

IV.   Program Development/Forecasting for the Next Academic Year:
Create a short narrative describing the development forecasting elements, indicating how they support efforts to achieve any of the following, where applicable: Program Outcomes, Institutional Goals, Institutional Objectives, and/or Institutional Learning Outcomes.

A.   New or modified action steps for achieving Institutional Goals and Objectives
B.   New or modified action steps for achieving Institutional Learning Outcomes
C.   New or modified action steps for achieving program outcomes
D.   Anticipated changes in curriculum and scheduling
E.   Levels or delivery of support services
F.   Facilities changes
G.   Staffing projections
H.   Strategies for responding to the predicted budget and FTES target for the next academic year

With the passing of the bond, the advancement office will need to review the possibility of a campaign to support the remodeled/new buildings. The Foundation is considering a Major Gifts Director (perhaps part-time) to assist in that effort.
Enrollment outreach continues to be a challenge for marketing and the college. Updates to the website will dovetail with efforts to inform future and current students of the college's offerings.
Strategic planning efforts by the Foundation Board indicate that a renewed focus on committee

work will be needed to engage with the board membership.

The current building for the Advancement team is a modular, not on the list for bond support, so in order to grow, additional space needs to be found.

In 2015, Advancement will need to welcome three new employees: Director of Grants Development, Marketing Coordinator, and Foundation Programs Coordinator. Bringing on board almost 1/3 of the staff will take transition and planning efforts that may challenge our ability to move forward in the short term, but will hopefully re-energize the Advancement Office in the long-term.