

MCKIMMON CENTER FOR EXTENSION & CONTINUING EDUCATION
Compact Plan
2004-05/2005-06/2006-07

I. INTRODUCTION

McKimmon Center for Extension and Continuing Education (MCE&CE) was established in 1924 as the College Extension Division and, in the land grant tradition, serves both the campus and the public by: 1) developing and facilitating enrollment in the University's credit and noncredit courses; 2) establishing relationships with local and state governments, nonprofit organizations, communities, business and industry to address areas of need; 3) providing space, support services and the infrastructure for successful events management; and 4) delivering relevant technical assistance and applied research to schools, community colleges, municipalities and public agencies. Technologies are employed, wherever possible, to overcome barriers of location and time that impact the customer. MCE&CE's mission is "to enhance the skills and enrich the lives of North Carolina's citizens, communities and organizations by facilitating and expanding access to NC State University intellectual and technical resources."

According to a recent publication by the University Continuing Education Association (UCEA), 90 million adults participate in some form of continuing education during a typical year. Sixty-two percent of those participating already possess a college degree, with the expectation that the demand for continuing higher education will continue to increase. UCEA also reported that by 2008, the 35-64 age group would account for 63 percent of the labor force.

Furthermore, demographic shifts resulting from varying birth rates in population groups, changing immigration patterns, longer career spans and increasing numbers of women will impact the composition and age distribution of the labor force dramatically. Those people already in the workforce, as well as new entrants, will need higher levels of education and training to enhance their employment future and adapt to the needs of a highly competitive global economy characterized by rapid technological change. MCE&CE is sensitive to these trends and is prepared to address those needs through responsive professional development offerings, noncredit certificate programs, contractual services, credit courses and e-learning options reflective of customer demands.

EducationforAdults.com surveyed 517 prospective adult students in November 2003 and found that 53 percent would attempt to complete a degree program when returning to college. Of those surveyed, 40 percent cited balancing family, education and work as their major concern. Through MCE&CE's Credit Programs & Summer Sessions (CP&SS) unit, nontraditional students are provided flexible access to NC State's credit courses and programs. For the past several academic years an average of 3,100 Lifelong Education students have registered for on-campus and/or Distance Education courses each semester, an enrollment figure larger than the full-time enrollment of two of the universities in the UNC System. Over 900 of these students matriculate each year into undergraduate or graduate degree programs. Maintaining available and accessible courses for these part-time students is an area of concern given budget reductions and rising tuition. The semester credit hours generated by on-campus registrations contribute significantly to University instructional funding. CP&SS is also the focus of all Distance Education registration activities originating from the University's departments and colleges through an agreement with Distance Education & Learning Technology Applications (DELTA). Steady growth in Distance Education is expected through 2004-07. CP&SS administers the University's Summer Sessions, the largest in North Carolina, which enrolls over 13,000 students per year in more than 850 course sections offered by the University's academic units. The CP&SS advising team provides support for students across these areas through advisement, math placement testing, study skills workshops, computer-assisted career decision-making, recruitment, orientation, and referral services for current as well as prospective students.

Three key units represent the noncredit component of MCE&CE. The first is Continuing and Professional Education (CPE) consisting of the McKimmon Conference and Training Center (MCTC) which provides facilities and meeting support services for over 150,000 participants in 1,800 events each year; the Office of Professional Development (OPD) which manages approximately 300 noncredit offerings serving better than 12,000 attendees annually; and the Computer Training Unit (CTU) which implements more than 600 courses with 3,500 registrants during a given fiscal year. The State Approving Agency granted approval in February 2003 for eligible veterans to receive VA benefits through successful completion of certain CTU courses. This was a first in North Carolina for noncredit programs. These combined CPE units typically generate more than \$5.0 million in receipts-based revenue on an annual basis, providing needed personal growth, IT training and professional development opportunities to North Carolina citizens utilizing minimal state appropriations. Collectively, CPE participants add an estimated \$7,000,000 to the local economy annually. The stability of the overall economy impacts the level of participation and influences revenue generating capacity with minimal sustained growth in volume of offerings, enrollment level and receipts anticipated during 2004-07.

The second major noncredit unit, the Center for Urban Affairs and Community Services (CUACS), was established in 1966 by the North Carolina Legislature. CUACS provides survey research, program evaluations, outcomes assessment and applied research to public agencies, schools and nonprofit organizations primarily through contractual arrangements that typically exceed \$4.0 million annually. CUACS's Technical Outreach to Public Schools initiative with the NC Department of Public Instruction is a prime example of a long-term relationship with a state agency, spanning thirteen consecutive years. Reductions in public agency funding directly influence available project and grants money, thereby increasing the challenge to CUACS's leaders to secure and maintain viable funding sources.

The Encore Center was approved by the Board of Governors in 1992 and provides lifelong enrichment options for adults over 50 years of age, serving more than 725 members each year. Encore's sixty-five annual noncredit six-week courses, which are heavily dependent on the volunteer instruction provided by NC State faculty and staff, adds a group of third-age learners to the NC State constituent base. Diminishing investment portfolios impact the cash flow of older adults while continuous University budget cuts reduce the availability of overworked faculty—both essential to Encore's success in sustaining its membership.

In a customer driven operating environment it is important to effectively identify needs, efficiently reach a diverse yet targeted audience, and routinely determine the level of success in addressing relevant needs and meeting customer expectations. The lead role in better integrating broad assessment processes resides with the Assessment, Marketing, Business and Partnership Development unit. Evidence of long-term relationships within the public and private sectors as well as a pattern of repeat customers are valid measures of MCE&CE's overall performance. End-of-course evaluations are a standard practice for MCE&CE noncredit program units with an established minimum acceptable average rating of four on a scale of five, with five being excellent. Student and client satisfaction surveys are implemented in four-year intervals to gather pertinent feedback and to identify unmet needs. Information generated from these sources and more comprehensive assessment instruments is useful in decision-making, planning and quality improvements related to all aspects of service and program delivery. To survive in a primarily self-support financial model, remaining flexible and responsive are key components of the MCE&CE organizational culture.

In addition to its leadership and service role in continuing education, MCE&CE also leads the campus in its electronic collection and reporting of annual non-degree-credit educational activity (10,000 events with 500,000 attendees each fiscal year) as well as the overall management of the Connecting in North Carolina (CINC) faculty development tour. The International Association for Continuing Education and Training (IACET) recently recertified MCE&CE for a five-year period as the provider of Continuing Education Units (CEUs) for all

NC State's professional development programs which number around 850 annually serving 5,500 enrollees.

MCE&CE and its 125 permanent staff members remain poised to champion the adult, nontraditional learner and will support the efforts of the Provost and Vice Chancellor for Extension and Engagement to ensure affordability and access for all who seek lifelong learning opportunities. MCE&CE is committed to be a partner, both internally and externally, as NC State evolves into a fully engaged research intensive 21st Century University that impacts the lives of the citizens of North Carolina and beyond.

MCE&CE Initiatives

Color Code:
Black – Applicable to overall organization
Red – Noncredit emphasis
Green – Credit Component

The following KEY is used to categorize the initiatives contained in this document. Categorizations appear in {brackets} following each initiative:

- A. University Goal/Diversity
- B. University Goal/Partnerships
- C. University Goal/Efficient Business Model
- D. Learning in a Technology-Rich Environment
- E. Unit-specific Goal
- F. Improving Unit Performance
- G. Enrollment Growth

A. Expand Access to University Programs and Resources to Better Serve a Broad-Based Constituency {A, B, D, E, G}

Primary Responsibility: Assistant Vice Chancellor (AVC), Associate to the AVC and Respective Directors

A-1. Objective: The Office of Professional Development (OPD) and the Computer Training Unit (CTU) will extend quality training opportunities through incorporation of "Growth Strategies Grid" model advocated by continuing education marketing expert, Dr. Ralph Elliot of Clemson University, and used by continuing higher education units throughout the nation.

Actions:

1) Incorporate the four-pronged approach in OPD (04-05) and the CTU by 2006-07:

- Market Penetration -- offer established programs to existing customers (75 percent of total annual programming).
- Product Development -- plan new programs for existing customers (15 percent of all programmatic activity).
- Market Development -- offer established programs to new customers (eight percent of annual OPD/CTU programs).
- Diversification -- Plan new programs for new customers – the most challenging (two percent of total program offerings).

- 2) Add a contract training element to the marketing mix through staff and resource reallocations by September '04.
- 3) Collaborative programming that targets prevalent market trends and customer needs will be initiated by CTU in 2004-05 with CTU being recognized as a key provider for computer training on-campus and in the region.

Outcomes:

- OPD will have an average two percent annual growth in overall programs offered with 330 the base total while maintaining registrants served at 13,000 – 14,000 annually.
- New programs and contract training will comprise 17 percent of CPE's annual offerings.
- CTU will implement more than 600 training offerings for on-and off-campus participants on an annual basis and have contract training relationships with the State Office of Information Technology Services and as well as other relevant organizations.

Performance Measures:

- End-of-course participant evaluations that consistently reflect a minimum acceptable 90 percent "very good to excellent" rating.
- Number of CTU contract agreements; two per year the target.

Resource Request: Funded via registration fees and contracts

A-2. Objective: Credit Programs & Summer Sessions (CP&SS) supports a strategic enrollment-planning target applicable to Lifelong Education (LLE) students and advocates maintaining affordable tuition and fees.

Actions:

- 1) Associate Deans and Enrollment Planning Committee recommend and Provost endorses 9.0 percent (headcount) and 3.7 percent (SCH) on-campus Lifelong Education enrollment planning targets by June '06.
- 2) Academic departments provide on-campus class seats to Lifelong Education students (consistent with student demand and stated planning targets) via scheduling/registration process for '07 Fall semester.
- 3) CP&SS successfully recruits and enrolls Lifelong Education students such that enrollment stabilizes per targeted goals by '08 Fall semester.
- 4) 2006-07 LLE student survey conducted that will identify relevant student needs and determine how well student services are being provided with the results addressed by CP&SS and shared with other responsible campus units.

Outcomes:

- CP&SS will attract individuals each academic year into the LLE program, consistent within the action planning target outlined above, making it possible for a significant number of individuals to attend NC State who might otherwise be unable or ineligible to attend.
- Former LLE students will matriculate into undergraduate and/or graduate degree status at the rate of 25% or more of the LLE enrollment base from the preceding Fall.

Performance Measure:

- Sustained level of on-campus Lifelong Education academic year enrollment (9.0% headcount and 3.7% SCH).

Resource Request: \$0

A-3. Objective: Establish a DE noncredit continuing education component in collaboration with DELTA to better respond to corporate training needs and workforce development.

Actions:

- 1) Develop a plan to identify, analyze and select appropriate programs based upon internal and external resources, incorporate strategies to convert selected credit courses into noncredit module format, identify operations structure, and evaluate resource allocation-January 2005.
- 2) The Marketing Office will complete strategic market research, validation and needs analysis for noncredit DE course offerings with a prime purpose to evaluate key program and partnership opportunities – September '05.
- 3) By Fall '04, engage one NCSU academic unit with existing DE courses and with an interest in noncredit programming in this initiative; pursue noncredit DE opportunities with other colleges, departments and units.
- 4) Build internal and external partnerships and develop course marketing plans to better ensure a stable enrollment level-September '04 and beyond.
- 5) Continue, expand and market e-learning options available through CTU (on-line and Element K) and OPD (TrainingBank.com).

Outcomes:

- Noncredit Distance Education operational plan and marketing strategies ready for implementation by Fall 2005 contingent on a pilot-planning phase.
- One NCSU credit DE course converted to noncredit modules and/or one new noncredit offering developed per year, over a three-year period; a minimum of 15 enrollments per course will be attained beginning August 2005.
- A minimum of one corporate partner who provides a nucleus of potential registrants will be sought for each start-up course per year.
- During 2005-07, two additional academic units responsive to the distance education trend will commit to joint DE noncredit offerings.

Performance Measures:

- NC State will be recognized as a leader in distance continuing education given both the quality and volume of offerings.
- Noncredit DE courses will generate funds through registration fees sufficient for full cost recovery to include associated marketing.
- End-of-course evaluations, follow-up outcome and impact assessments, and a consistent level of course enrollments will determine how well customer needs are identified and satisfied through the various delivery modes.

Codicils:

- MCE&CE and DELTA (Codicil 1)

Resource Request: -0-

A-4. Objective: CP&SS, working in concert with other campus units, will enhance the delivery of Internet-based student services to facilitate access to programs at NC State.

Actions:

- 1) CP&SS will review and catalog the services and associated links provided to students via the web in support of the on-campus Lifelong Education, Distance Education, and Summer Sessions program areas by August '04.

- 2) Working in collaboration and in partnership with DELTA, CP&SS will jointly develop an Internet-based orientation for students enrolled in Distance Education courses during 2004-05.
- 3) CP&SS will take steps, working with other campus units, to create an internet-based Summer Sessions Bulletin by June '06 as part of an integrated course database. This will be made possible through reallocation of Summer Sessions' funds.

Outcome:

- Enhanced overall service delivery and improved access to current services provided by CP&SS as well as partner units based on formal and informal student feedback.

Performance Measures:

- Increased volume of Internet activity.
- Nature of feedback from students served across all three program areas.
- Reduction in "routinely asked questions."

Codicil:

- CP&SS and DELTA (Codicil 2)

Resource Request: -0-

A-5. Objective: Encore staff and member committees will be proactive in better serving older adults with limited mobility or finances, with distance concerns, and/or those less represented among the membership.

Actions:

- 1) A member survey will be finalized by September '04 with the feedback integrated during the 2004-07 program planning cycle; surveys will be completed in subsequent four-year intervals.
- 2) A minimum of two topical presentations and three courses will be offered annually at off-site locations in the Wake/RTP area beginning '04-05.
- 3) Based on interest and enrollment, a minimum of one six-week course will be videotaped for distribution to senior groups, individual members, and for cable broadcast on the CRC channel.
- 4) Offer programming that appeals to "baby boomers."
- 5) Include a minimum of six courses and one special event or study trip with diversity themes in 2004-05 and annually thereafter.
- 6) Strengthen partnerships with faculty, community experts, and internal and external service providers leading to at least one cross-generational program or research assistance project each year.
- 7) Sustain the necessary balance in the Member Shared Course Bank to have available funds for those seeking financial assistance.

Outcomes:

- By June '05, five percent of Encore members served will consist of individuals with accessibility concerns.
- Working relationships will exist with several relevant groups with at least one new collaboration formed each year.
- Encore will sustain a base annual membership of 725 with a growth target of two percent each twelve-month cycle with three percent minority representation by June '05 and four percent by June '07.

- At least two members will take advantage of financial assistance annually through the Member-Shared Course Bank.

Performance Measures:

- Encore members will encompass the full range of eligible age groups, 50-85+, with representation from various sectors of the local adult population.
- The membership base will reflect an average of 65 percent continuing/returning members with 35 percent being first-time members.

Resource Request: \$0

A-6. Objective: The Center for Urban Affairs and Community Service (CUACS) will market itself on campus and with colleagues at other state agencies to expand research opportunities and increase funding options beyond the past three year average of \$4.25 million.

Actions:

- 1) Work collaboratively with other faculty to submit proposals to local government and state agencies with a focus on critical and emerging issues facing the state and nation.
- 2) Strengthen its expertise relevant to critical social issues particularly in the areas of education, mental health and the environment.
- 3) Create and distribute CUACS brochure to appropriate state and local agencies as well as campus department heads and directors by March '05.
- 4) Periodically submit updated information about the Center to purchasing offices/agents in state government, to state agencies and to various campus units.

Outcomes:

- Finalize a contract with at least one agency each fiscal year.
- Engage in two key contractual service activities with campus faculty, staff and/or students each year.
- Increase contract/grant funding by one percent each of the three years in the Compact cycle.

Performance Measures:

- Number of proposals submitted by the Center compared to the number funded with 85 percent the target benchmark.
- Volume of collaborative initiatives with faculty, staff, students and relevant campus program/service units.

Resource Request: Contractual Services

A-7. Objective: MCE&CE will reemphasize its commitment to diversity as reflected in the composition of its staff and an overall inclusive organizational environment. Diversity will be valued recognizing that differences are to be respected and accepted.

Actions:

- 1) Unit programmatic and promotional focus will be those individuals/groups underserved in an effort to attract and serve a diverse clientele.
- 2) Professional staff recruitment will target diverse population sectors in an effort to potentially interest more minority applicants with an emphasis at the EPA professional level.

- 3) Develop personal enrichment noncredit courses that appeal to diverse audiences whether based on racial, cultural, social, economical, religious, generational or gender differences.
- 4) Utilize technology when feasible to enhance responsiveness and expand service capability.
- 5) Be a campus advocate with respect to availability and accessibility of educational opportunity for nontraditional students.
- 6) Emphasis will be placed on enrollment in pertinent supervisory training and/or relevant professional development activities to enhance effectiveness in working with all personnel and customers.
- 7) Diversity-in-the-workplace issues will be addressed in appropriate staff functions throughout the 2004-07 cycle.

Outcomes:

- MCE&CE staff will have an overall minority representation of at least 18%.
- Nontraditional on-campus student population as depicted by LLE enrollments will constitute 9.0% of the NC State student headcount by Fall '08.
- By June '07, Encore membership will have a 4% minority presence typical of most LIR programs and consist of 5% with accessibility limitations.

Performance Measures:

- The number of minority employees in MCE&CE workforce.
- Number of minorities and less-served that are reached through Encore offerings.
- On-campus LLE student enrollment per academic year.

Resource Request: \$0

B. Develop Support Infrastructure for Students Who Fail to Satisfy the Progress Toward Degree Completion Regulation {B, E, G}

Primary Responsibility: AVC and Director of CP&SS

B-1. Objective: The Fall 2002 Progress Towards Degree academic eligibility regulation states that students who fail to satisfy the requirements will be required to enroll through Credit Programs & Summer Sessions (CP&SS) effective Spring 2006, via a curriculum yet to be named.

Actions:

- 1) Collaboration between CP&SS, Enrollment Management and the Division of Undergraduate Affairs must continue in order to minimize the number of students adversely affected and to facilitate an efficient and smooth transition for the students who are affected.
- 2) Support thresholds, while difficult to quantify in advance of servicing this variable population, are projected to be one EPA professional adviser for up to 250 students and one additional SPA support staff member for up to 600 students. The positions must be established and Provost permanent funding allocations totaling \$82,220 approved during July '05 to facilitate October '05 hires. A one-time \$7,350 operating budget request is part of the start-up activity. Additional funds may be required and must be made available in a timely manner to address a sudden influx of these students.
- 3) Random follow-up student surveys will be completed during 2007-08.

Outcomes:

- Dependent on level of staff funding, a responsive student services support infrastructure for this student population will be developed and maintained.
- Analyses of various student data sources and student surveys will document impact of regulation on enrollment management and the effectiveness of student services with respect to successful reentry.

Performance Measures:

- Positive feedback gathered from the student survey and through informal interaction.
- Successful level of re-entry to a degree track for impacted students will be an important indicator and will shape future services provided.

Codicil:

- CP&SS, Division of Undergraduate Affairs and Provost (Codicil 3 – submitted to Undergraduate Affairs for review.)

Resource Request:

- \$82,220 – permanent from Provost (2005-06 initial FY)
- \$7,350– one time from Provost (2005-06)

C. Increase Service Capabilities in order to be of Greater Value to the Campus Community and External Partners {B, C, D, E, F}

Primary Responsibility: AVC, Associate to AVC and Respective Directors

C-1. Objective: OPD will strive to become the centralized resource on the NC State campus for managing educational events.

Actions:

- 1) Foster campus awareness and greater utilization of OPD events management expertise through-
 - direct communication with key college and departmental personnel to explore viable opportunities for cooperation;
 - participation in trade shows, exhibits and related networking events;
 - a review of OPD's image, branding and awareness plans by the Marketing Office, leading to more effective strategies where needed.
- 2) MCE&CE personnel will disseminate information about the services available through OPD and the other units in a professionally designed packet to include a publication "Profiling MCE&CE" by December '04.

Outcomes:

- Operational efficiencies will be improved through a centralized "events management" function performed by OPD's sixteen Certified Program Planners; staff-hours of service provided for the 215 programs managed in 2002-03 ranged from 5 hours to 260 hours each.
- More agreements with NC State academic and administrative units will be confirmed, increasing at the rate of one new agreement each year (Templates A, B, and C).

Performance Measure:

- Value-added service to the campus as reflected by an increase from 200 to 250 in the number of educational events offered by colleges, departments and units that are implemented through OPD by June 2007.

Resource Request: Through Fee-For-Service arrangements

C-2. Objective: MCE&CE will strengthen its relationship with the Alumni Association to better serve and engage NC State graduates.

Actions:

- 1) Develop and implement a survey to gather pertinent information from Association members relevant to personal interests and to determine areas of need within their respective organizations, businesses and communities-December '04.
- 2) Plan, market and implement one collaborative fee-based educational offering during each fiscal year, based on the survey and participant feedback, starting during 2004-05.
- 3) Employ marketing approaches that will highlight services and programs available from the partner organizations.
- 4) Form an advisory committee to assist MCE&CE and the Alumni Association in program development and service delivery.

Outcomes:

- Implementation and completion of membership needs/interest survey - 2004-05.
- Develop and implement one joint educational venture for each of the three years with the Alumni Association targeting needs of NC State graduates.

Performance Measures:

- Course evaluations will validate participant satisfaction (4 or higher score).
- Future University Planning and Analysis Baccalaureate Alumni Surveys will reflect an increasing trend of those who place value in alumni short courses/seminars compared to the average 63.6% reported from the 1998 and 2003 surveys.

Codicil:

- MCE&CE and Alumni Relations (Codicil 4)

Resource Request: \$0

C-3. Objective: McKimmon Conference & Training Center (MCTC) management will continue to make enhancements to the level of customer service, technological capabilities and the appearance of the existing facility.

Actions:

- 1) Beyond the February '04 completion of the main Center lobby, the public hallways and annex foyer will be renovated with new carpet, ceiling, lighting and wall covering in '04-05 creating a positive impression on users and visitors, even providing designated areas for campus displays.
- 2) Substantial improvements to meeting rooms will be professionally planned with rooms 3-9 completed in '05-06 and other meeting rooms in the Annex plus Room 232 by June '07. This activity will be paid from existing trust funds.
- 3) McKimmon Conference & Training Center will maintain an appropriate infrastructure and technically trained staff in order to effectively meet customer demands for technology applications.
- 4) Client Relations staff will expand its role as provider of caterer information to Center users to a full-scale catering planning, coordination and implementation role starting July 2004.
- 5) Room 10, the dedicated production classroom, will be marketed as a Tele-Center capable of providing interactive video-conferencing and teleconferences. New focus group software will be purchased for utilization in Room 10 by Fall '04.

- 6) Periodically review tentative plans for the 40,000 square-foot proposed Center expansion with a public and private funding mix to validate need and to gain a sense of campus support for the project.

Outcomes:

- Volume of MCTC usage will remain stable and level of client satisfaction will reflect a slight increase as a result of the planned facility improvements and service enhancements.
- Fifty percent of MCTC Tele-Center (Room 10) reservations will be technology-dependent events.

Performance Measures:

- Volume of facility usage and level of repeat business.
- An average client evaluation of no less than 4 on a scale from 1 (lowest) to 5 (highest).

Resource Request: \$0

C-4. Objective: Develop and expand partnerships with campus and community groups to advance the University's land-grant mission and accomplish unit goals.

Actions:

- 1) Marketing and public relations efforts aimed at positioning MCE&CE in the minds of potential customers, campus units, corporate and government partners will be intensified.
- 2) From existing funds, MCE&CE will provide appropriate financial support for relevant internal programs and for joint Extension & Engagement ventures. Of special interest are potential cooperative relationships with Centennial Partners, the Economic Development Partnership, Kenan Institute, Biotechnology Center, Shelton Leadership Program, Centennial Middle School/Friday Institute, SBTDC, NCDPI and the College of Management – Enterprise Risk Management.
- 3) \$10,000 from trust accounts will be earmarked as “program seed money” annually to generate timely, high demand multidisciplinary opportunities between MCE&CE units and campus or external partners.
- 4) Collaborative experiential learning opportunities will be provided to Honors Program and Service Learning students in collaboration with the two respective units.
- 5) Connecting-in-North Carolina (CINC) tour will be managed by MCE&CE with input from CINC Advisory Committee. Given recent budget cuts and dependant on the '04-05 budget, MCE&CE leaders, working with the University Development Office, will begin solicitations for joint CINC sponsorship by key businesses, industries and individuals for the proposed May '05 session.

Outcome:

- MCE&CE will be recognized as a resource for entire campus community based on reputation and exposure.

Performance Measures:

- Increased rate of inquiries and contacts resulting from improved awareness of MCE&CE services.
- The level of joint initiatives developed and/or co-sponsored programs implemented in 2004-07 Annual Reports.

Resource Request: \$0

D. Implement Management Practices to Enhance Quality of Service, to Improve Efficiency and to Maintain Financial Stability {B, C, E, F, G}

Primary Responsibility: AVC, Associate to the AVC and Unit Directors

D-1. Objective: MCE&CE noncredit units that operate in a primarily self-support environment will remain financially solvent through effective management.

Actions:

- 1) Maintain OPD's indirect expenses to less than 21 percent and CTU's to no more than 25 percent of gross receipts in order to generate appropriate "operating" margins, consistent with similar noncredit higher education program units.
- 2) Secure annual CUACS grant/contract funding beyond the \$4 million threshold with at least 85 percent of submitted proposals approved, a rate higher than most related contract-supported units.
- 3) Generate \$45,000 in total Encore endowment contributions by June '06.
- 4) Sustain a MCTC business volume necessary to generate a minimum of \$1 million in receipted income each fiscal year.
- 5) Create program and service opportunities internal and external to the campus, managing the "start-up" to evaluate long-term sustainability.

Outcomes:

- End-of-year balanced budgets achieved through fees, dues, contracts and/or grants.
- Encore fees maintained at levels affordable to older adults on fixed incomes.
- One significant "business incubator" initiative successfully undertaken each fiscal year.

Performance Measures:

- Balanced receipts budgets with indirect expense benchmarks achieved.
- Consistent business volume and revenue trends for the respective units recognizing the impact of external factors such as economic conditions, social and political climate, and natural occurrences.

Resource Request: \$0

D-2. Objective: MCE&CE units will implement and enhance program evaluation and impact assessment as a part of a continuous quality improvement process.

Actions:

- 1) To evaluate overall success of selected promotional campaigns, the Marketing Office and the respective units through the use of codes will track mailing lists effectiveness on the mailing labels that reveal the particular list that attracts a specific attendee. Newspaper, magazine, TV and radio ads will be tracked through periodic surveys of actual enrollees being asked how they heard about the program.
- 2) Prospective CTU certification students will be given pre-program assessments to determine their aptitude and potential for success with alternate training options or additional coursework recommended where appropriate.
- 3) A CTU customer survey will be administered in March 2005. The survey will obtain information about prior/current customer experiences with CTU and be used in assessing training needs.

- 4) Beyond the standard end-of-event evaluations, additional measures will be implemented in '04-05 by relevant MCE&CE units:
 - For three-week noncredit diploma programs, post-event surveys will be distributed after several months to gain insight as to how the knowledge gained from participation has impacted the attendees on the job.
 - For selected OPD offerings, pre- and post-tests are to be administered to gauge the amount of knowledge gained by attendees.
- 5) Outcome assessments will be conducted by each unit to measure impact of programs/services and to guide future planning.
- 6) Marketing will establish a web feature titled "McKimmon Achievers" and invite website visitors to tell how their relationship with MCE&CE or one of its units impacted their life and/or career.
- 7) Marketing Manager will solicit and archive testimonials on impact via the McKimmon ENews (electronic newsletter) to be initiated in conjunction with a Fall '05 advertising campaign.
- 8) Marketing Office will be responsible for website enhancements and provide semi- annual analyses of site traffic/navigation patterns.
- 9) Implement 2006-07 LLE student survey to better understand academic and student service needs, utilizing the feedback to enhance both quality and availability.
- 10) Integrate, starting in '04-05, the Encore member survey results where practical to maintain the desired level of membership satisfaction and sustain consistent volume of course enrollments.
- 11) Encourage respective MCE&CE units to conduct staff in-service training to enhance the knowledge, skills and abilities of this valued resource in order to maximize organizational effectiveness and efficiency.

Outcomes:

- Gather baseline data for monitoring and assessing advertising/marketing effectiveness as well as programmatic and service responsiveness.
- Gain better understanding of client satisfaction and training needs; a measure of life and/or work impact; and a determination of the quality of instruction, facilities and customer services leading to organizational improvements where appropriate.
- CP&SS staff complete Myers-Briggs self-assessment training by September '04, leading to organizational changes as may be needed during '04-05.
- Provide staff development event/exercise to CP&SS staff during '05-06 to build upon Myer's Briggs self-assessment training and enhance the unit's overall service delivery.

Performance Measures:

- Quality standards are maintained as reflected by at least 85 percent of completed evaluations having very good to excellent overall ratings.
- Client surveys, post-event follow-ups, student completion and matriculation rates, and web-enhanced feedback will indicate the level of impact on personal lives, educational attainment and/or career growth.
- Pre-and post-test scores for selected OPD offerings will consistently reflect an average increase of 35 points.
- The acceptable norm for continuing and/or for returning customers will be 65% for Encore membership and 75% for MCTC business volume; 70% grant/contract renewal rates will be the benchmark for CUACS.

Resource Request: \$0

III. Summary

2004-05 Actions

A. McKimmon Center for Extension and Continuing Education (MCE&CE)

- 1) Commit up to \$50,000 in funds generated by the UPS endowment to support transportation-related programs and/or applied research. – FY '04-05
- 2) With an overall targeted 18% minority employee representation, focus will be on recruiting minority applicants for any vacant EPA positions and providing an inclusive work climate in which diversity is valued. – August '04 and on-going
- 3) In cooperation with Development Office and dependent on the '04-05 budget, secure external financial co-sponsors for CINC, seeking a funding level between \$10,000 and \$30,000. – September '04
- 4) Advertising (courses, services, positions) will place an emphasis on diverse population sectors. – December '04
- 5) Dedicate \$10,000 as seed money for relevant multidisciplinary opportunities. – December '04
- 6) Pursue relationship-building efforts with the Alumni Association, implementing two joint offerings and an alumni survey. – December '04
- 7) CINC successfully implemented in May '05.

B. Marketing and Communications

- 1) The Marketing Services Office in concert with CUACS will promote comprehensive and large-scale primary market research and program assessment services to two MCE&CE and DELTA partners. – '04-05 FY
- 2) Complete both a comprehensive market validation analysis and a services overlap study to verify and quantify the existence of a significant and unmet need for marketing services on the NC State University campus. – August '04
- 3) First quarter of FY '04-05, work to complete the following transitional steps:
 - With the assistance of DELTA and MCE&CE business officers, investigate possible structural models for a receipts-based operation shared between the two units; seek Contracts and Grants approval of the proposed rate structure; and develop necessary administrative procedures for the creation of a new service center focused on providing integrated marketing services.
 - Based on the results of validation analysis, craft a memorandum of understanding between DELTA and MCE&CE, to include a transition plan from appropriated to receipts-based MSO operation.
 - Complete and promote the results of at least two highly visible pilot market research projects to position this new MSO service in the campus community.
- 4) Conduct strategic market research, validation and needs analysis for noncredit DE course offerings. – January '05
- 5) Participate in the joint MCE&CE/DELTA effort to convert, market and deliver a minimum of one current credit-bearing Distance Education program as noncredit modules. – August '04 and beyond
- 6) Develop a noncredit Distance Education business plan in conjunction with DELTA. – Fall '04
- 7) Build internal and external partnerships, develop course marketing plans and implement participant recruitment campaigns to contribute toward maintaining a stable enrollment level. – September '04 and beyond
- 8) Solicit and archive testimonials on impact via the McKimmon ENews (electronic newsletter) to be initiated in conjunction with a Fall '04 advertising campaign.
- 9) Commence market research focused sales and service operations. – October '04

- 10) A MCE&CE promotional campaign will be developed that will highlight the organization as a whole as well as promote and distinguish the strengths of the individual credit and noncredit units – i.e. the “Profiling MCE&CE” publication and McKimmon Tele-Center marketing effort. – December '04
- 11) Design and facilitate implementation of an MCE&CE/Alumni Association survey. – December '04
- 12) The MCE&CE main page and unit website will reflect a significantly enhanced level of interactivity, functionality, information currency and improved linkage with Extension and Engagement, Provost and other campus partner sites. – January '05
- 13) Establish a web feature titled “McKimmon Achievers” and invite website visitors to tell how their relationship with MCE&CE or one of its units impacted their life. – June '05

**C. Credit Component
CP&SS**

- 1) Endorsement received for 9.0 percent (headcount) and 3.7 percent (SCH) on campus Lifelong Education enrollment targets to be used in subsequent enrollment planning and management. – by Fall '04
- 2) Current campus wide web-based student services (within CP&SS and external to the units) will be catalogued. – August '04
- 3) All full-time staff members of CP&SS will complete individual self-assessments utilizing the Myers-Briggs or similar instrument to improve internal efficiency and quality of customer service provided. – September '04
- 4) An EPA professional advisor and an SPA service support staff in CP&SS will be approved: position funding by July '04; positions filled in October '04.

**D. Noncredit Component
CPE**

- 1) OPD/CTU will develop new programs for new customers (two percent of total programs). – '04-05
- 2) OPD/CTU will take established programs to existing customers (75 percent of programmatic activity). – '04-05
- 3) OPD/CTU will plan new programs for existing customers (15 percent of programmatic activity). – '04-05
- 4) OPD/CTU will deliver established programs to new customers (eight percent of programs). – '04-05
- 5) OPD indirect expenses will be held to no more than 21 percent with CTU not to exceed 25 percent of overall gross revenue. – FY '04-05
- 6) Endowment solicitation and dedication of the Turner Lobby achieved by Fall '04.
- 7) Develop a noncredit Distance Education business plan and marketing strategies in cooperation with DELTA and MSO. – September '04
- 8) Engage one academic unit in the noncredit DE initiative and convert one credit DE course to noncredit modules available to registrants by January '05.
- 9) Identify and secure one corporate partner for a DE noncredit course. – January '05
- 10) Subsequent to the renovation of the McKimmon Center lobby, systematic improvements totaling approximately \$450,000 will be professionally planned and completed in two primary phases: Phase One – the hallways and foyer during '04-05; Phase Two – the meeting rooms during the '05-06 and '06-07 fiscal years.
- 11) CPE advertisements and mailing lists will be adjusted based on tracking statistics to improve rate of return on promotional dollars. – June '05
- 12) OPD events management agreements will be increased by one new campus unit. - June '05
- 13) Pre- and post- testing conducted by OPD will be increased in multiples of eight program offerings each fiscal year. – June '05

- 14) Improved technical capabilities and staff training will generate at least fifty percent technology dependent program utilization in MCTC Room 10. – June '05

CUACS

- 1) Brochure distribution and follow-up contact with two prospective clients will be completed. – October '04
- 2) Renew or gain a new contract with at least one public agency and solidify two collaborative initiatives with faculty and students. – June '05
- 3) Review its technology support needs, expand technical services where appropriate and provide for staff training/professional development. – June '05

Encore

- 1) Offer a minimum of four courses and one special event or study trip with diversity themes. – FY '04-05
- 2) One six-week Encore course will be videotaped during the academic year for distribution to selected sites, seniors and for CRC cable broadcast. – '04-05
- 3) Encore Center revenues will match or exceed expenses through an affordable fee structure, maintaining base membership level of 670 – FY '04-05
- 4) At least one new collaborative relationship will be formed and one cross-generational or research assistance project undertaken. – March '05
- 5) Provide financial aid to two members through the "Member-Shared Course Bank." April '05
- 5) Minimum of two off-site topical presentations and three off-site courses implemented. – May '05
- 6) A minimum of two volunteer projects will be completed. – June '05
- 7) The Encore Center member interest survey will be finalized during the '04-05 first quarter with the results will be included in Center planning. – June '05

2005-06 Actions

A. McKimmon Center for Extension and Continuing Education (MCE&CE)

- 1) Commit up to \$50,000 in funds generated by the UPS Endowment to support MCE&CE transportation-related programs and/or applied research. – FY '05-06
- 2) Advertising (courses, services, positions) will place an emphasis on diverse population sectors. – August '05
- 3) With an overall targeted 18% minority employee representation, focus will be on recruiting minority applicants for any vacant EPA positions and providing an inclusive work climate in which diversity is valued. – August '05 and on-going
- 4) In cooperation with the Development Office and dependent on the '05-06 budget, secure external financial co-sponsors for CINC, seeking a \$5,000 funding threshold combining in-kind support with direct contributions – September '05
- 5) Donate up to \$5,000 to support key Extension and Engagement initiatives, i.e. Shelton Forum, and \$4,000 for part-time student financial assistance.
- 6) Dedicate \$10,000 as seed money for relevant multidisciplinary opportunities in which MCE&CE is a partner. – December '05
- 7) Participate in and support efforts of the EOC, USCOEE and UAOC.
- 8) CINC successfully implemented in May '06.
- 9) Work with the Provost office and Vice Chancellor for Development in establishing operational plans for the Joyner Visitor Center.
- 10) Stimulate dialogue with respect to the 40,000 square-foot Center expansion proposal in an effort to explore viable funding options.

E. Assessment, Marketing and Partnership Development

- 1) The Marketing Office in concert with CUACS will promote comprehensive and large-scale primary market research and program assessment services to two MCE&CE partners. – '05-06 FY
- 2) MCE&CE units will routinely conduct outcome and impact assessments to ensure quality and to guide future planning. – '05-06
- 3) Assessment results will be posted on unit web pages and the MCE&CE website under a "Results" heading. The new feature will include: recognition of impact; demonstration of commitment to quality assurance; a relationship with an academic unit or external partner; and utilized as a recruitment tool. – '05-06
- 4) Complete a comprehensive marketing plan integrating specific promotional services for each MCE&CE unit. – August '05
- 5) Develop a noncredit Distance Education business plan and specific marketing strategies. – Fall '05
- 6) Lead the joint MCE&CE/DELTA effort to convert, market and deliver a minimum of one current credit-bearing Distance Education program as noncredit modules. – August '05 and beyond
- 7) Engage one academic unit in the noncredit DE initiative and convert one credit DE course to noncredit modules available to registrants by August '05.
- 8) Identify and secure one corporate partner for a DE noncredit course. – August '05
- 9) Establish a web feature titled "McKimmon Achievers" and invite website visitors to tell how their relationship with MCE&CE or one of its units impacted their life. – August '05
- 10) Complete strategic market research, validation and needs analysis for noncredit DE course offerings. – September '05
- 11) Build internal and external partnerships, develop DE course marketing plans and implement participant recruitment campaigns to contribute toward maintaining a stable enrollment level. – September '05 and beyond
- 12) Solicit and archive testimonials on impact via the McKimmon ENews (electronic newsletter) to be initiated in conjunction with a Fall '05 advertising campaign.
- 13) Create one significant partnership with an external agency/organization and in collaboration with an appropriate campus units, initiate responsive action to address identified needs. – October '05
- 14) Enhance/expand a MCE&CE promotional campaign to highlight the organization as a whole as well as promote and distinguish the strengths of the individual credit and noncredit units – i.e. the "Profiling MCE&CE" publication and McKimmon Tele-Center marketing effort. – December '05
- 15) Pursue relationship-building efforts with the Alumni Association, implementing one joint offering and a comprehensive alumni survey. – December '05
- 16) Improved technical capabilities, customer awareness and staff training will generate at least fifty percent technology dependent program utilization in MCTC Room 10. – December '05
- 17) The MCE&CE main page and unit website will be updated to reflect a significantly enhanced level of interactivity, functionality, information currency and improved linkage with Extension and Engagement, Provost and other campus partner sites. – January '06
- 18) Provide input in the development of the University Planning and Analysis 2006 Alumni survey and utilize relevant data obtained – survey completed by May '06.

B. Credit Component CP&SS

- 1) Develop position descriptions and gain approval for an EPA professional advisor and a SPA service support staff member with position funding received by July '05 and the positions filled in October '05.

- 2) Provide staff development event-exercise to CP&SS staff during '05-06 to build upon Myer's Briggs self-assessment training previously implemented in order to enhance the unit's overall service delivery.
- 3) Seek/obtain endorsement for 9.0 percent (headcount) and 3.7 percent (SCH) on-campus Lifelong Education enrollment targets to be used in future enrollment planning and management. – June '06
- 4) Working with other campus units, create an internet-based Summer Sessions bulletin by June '06 as part of an integrated course database.

**C. Noncredit Component
CPE**

- 1) OPD/CTU will develop new programs for new customers (two percent of total programs). – '05-06
- 2) OPD/CTU will take established programs to existing customers (75 percent of programmatic activity). – '05-06
- 3) OPD/CTU will plan new programs for existing customers (15 percent of programmatic activity). – '05-06
- 4) OPD/CTU will deliver established programs to new customers (eight percent of programs). – '05-06
- 5) OPD indirect expenses will be held to no more than 21 percent with CTU not to exceed 25 percent of overall gross revenue. – FY '05-06
- 6) Endowment solicitation and dedication of the Turner Lobby achieved by Fall '04.
- 7) Subsequent to the renovation of the McKimmon Center lobby, the hallways and foyers, systematic improvements totaling approximately \$550,000 will be professionally planned and completed in two primary phases: Phase One – meeting rooms 3-9 during '05-06 and Phase two – the Annex hallway and rooms and Room 232 in '06-07
- 8) CPE advertisements and mailing lists will be adjusted based on tracking statistics to improve rate of return on promotional dollars. –on-going.
- 9) OPD events management agreements will be increased by one new campus unit. - June '06
- 10) Pre- and post- testing conducted by OPD will be increased in multiples of eight program offerings each fiscal year. – June '06
- 11) Utilize findings from the CTU March '05 customer survey in future programming and planning.

CUACS

- 1) Brochure distribution and follow-up contact with two prospective clients will be completed. – March '05
- 2) Renew or gain a new contract with at least one public agency and solidify two collaborative initiatives with faculty and students. – June '06
- 3) Review its technology support needs, expand technical services where appropriate and provide for staff training/professional development. – June '06

Encore

- 1) One six-week Encore course will be videotaped during the academic year for distribution to members, seniors centers and for CRC cable broadcast. – '05-06
- 2) One new partnership to enhance programming will be developed in one of the following categories: research, intergenerational, or new programming. – '05-06
- 3) Market and provide relevant programming to Boomer age group, thus ensuring we are serving the whole 50-90+ eligible age range. – '05-06
- 4) The silent phase of a fundraising campaign will begin with the goal of enhancing programming and affordability/accessibility. – '05-06

- 5) Base membership level of 725 with minimum two percent growth and 65% member renewal rate. – '05-06
- 6) Continue commitment to underserved populations. Follow up on results of February 2005 minority focus group in 2005-06 marketing efforts. Minimum 3% minority membership and 5% participants with accessibility/financial distance concerns. – '05-06
- 7) Offer a minimum of four courses and one special event or study trip with diversity themes. – April '06
- 8) Plan for and hold 15th anniversary celebration that fully involves Encore members and generates publicity for the program. – April '06
- 9) Provide financial aid to a minimum of two members. – April '06
- 10) Offer a minimum of three courses off-site to enhance programming. – May '06
- 11) Minimum of two off-site topical presentations at senior center or retirement community. – May '06
- 12) A minimum of two volunteer projects will be completed. – June '06

III. Appendices

McKimmon Center for Extension and Continuing Education

A. Overall Performance Indicators

- 1) Credit enrollments
- 2) CPE volume of activity and enrollments
- 3) Lifelong Education (LLE) student matriculation to degree status
- 4) CPE annual receipted gross income compared with total (direct and indirect) expenses
- 5) Profile of OPD's events management function
- 6) McKimmon Conference and Training Center (MCTC) annual use volume
- 7) Level of Encore Center Membership fees collected and courses offered
- 8) Amount of contract/grant funding secured by CUACS
- 9) Customer survey and participant end-of-course evaluation results, pre-/post-test score differentials, and other impact/outcome assessment measures including level of repeat customers

B. Trend Data

1) Credit Enrollment

	<u>2000-01</u>	<u>2001-02</u>	<u>2002-03</u>	<u>2003-04</u>	<u>2004-07 Projection</u>
Lifelong Education¹					
On-Campus	2,530	2,321	2,062	1937	1,660-1,910
DE-Only	622	726	1,023	1054	1,160-1,360
Dual-Enrolled	61	74	113	173	200-250
Average Semester Total	3,213	3,121	3,198	3164	3,020-3,520

	<u>2000-01</u>	<u>2001-02</u>	<u>2002-03</u>	<u>2003-04</u>	<u>2004-07 Projection</u>
Distance Education (Degree)^{2 3}					
DE-Only	481	574	587	614	620-700
Dual-Enrolled	246	299	389	616	520-590
Average Semester Total	727	873	976	1230	1,140-1,290

	<u>2000-01</u>	<u>2001-02</u>	<u>2002-03</u>	<u>2003-04</u>	<u>2004-07 Projection</u>
Summer Sessions⁴					
Headcount Total	14,637	13,719	13,806	13,737	13,000-14,220
Credit Hours Total	55,241	55,991	56,600	56,384	53,280-58,320

2) LLE Matriculation to Degree Status

	<u>2000-01</u>	<u>2001-02</u>	<u>2002-03</u>	<u>2003-04</u>	<u>2004-07 Projection</u>
Matriculation (former LLEs)¹	918	930	998	1,012	910-1,090

¹ Matriculation of students who formerly enrolled through Lifelong Education

¹ Enrollment Data – Fall/Spring Average

² Enrollment Data – Fall/Spring Average

³ Degree – Includes degree, undeclared (UN) and inter-institutional (II) students

⁴ Summer Sessions – Calendar Year Totals are the Sum of Summer Sessions I and II Adjacent to the 'Start' of the FY

3) **CPE Noncredit Programmatic Volume of Activity and Enrollment**

	<u>2000-01</u>		<u>2001-02</u>		<u>2002-03</u>		<u>2003-04</u>	
	Offerings	Participants	Offerings	Participants	Offerings	Participants	Offerings	Participants
OPD	176	8,900	170	9,400	329	13,130	348	12,898
CTU - Classroom	969	8,871	560	4,559	463	3,150	462	3,058
CTU - Online	136	986	244	558	234	517	234	300

2004-07 Projections

	Offerings	Participants
OPD	335-375	13,200-14,000
CTU-Classroom	470-525	3,200-3,500
CTU-Online	240-245	520-650

4) **CPE Received Gross Income and Total Expenses**

	<u>2000-01</u>	<u>2001-02</u>	<u>2002-03</u>	<u>2003-04</u>	<u>2004-07 Projection</u>
OPD					
Income	\$2,765,000	\$2,303,000	\$2,753,000	\$2,921,008	\$2.8-3.0 million
Expenses	\$2,765,000	\$2,216,000	\$2,649,000	\$2,175,215	\$2.7-2.9 million
	<u>2000-01</u>	<u>2001-02</u>	<u>2002-03</u>	<u>2003-04</u>	<u>2004-07 Projection</u>
CTU					
Income	\$3,468,000	2,557,000	1,544,000	\$1,463,406	\$1.2-2.0 million
Expenses	\$3,407,000	\$2,817,000	\$1,462,000	\$1,218,909	\$1.2-1.9 million
	<u>2000-01</u>	<u>2001-02</u>	<u>2002-03</u>	<u>2003-04</u>	<u>2004-07 Projection</u>
MCTC					
Income	\$1,086,000	\$931,000	\$1,001,000	\$1,010,844	\$1.0-1.1 million
Expenses	\$955,000	\$820,000	\$881,000	\$1,010,844	\$900,000-1 million

5) **OPD Events Management Profile**

	<u>2000-01</u>	<u>2001-02</u>	<u>2002-03</u>	<u>2003-04</u>	<u>2004-07 Projection</u>
Events Implemented	35	49	215	268	225-250
Partners - Campus	5	7	9	15	Number of Codicils will increase from the current two by one per year (total 5 Codicils by June '07).
Partners - Off-campus	1	2	4	5	

6) **MCTC Annual Utilization**

	<u>2000-01</u>	<u>2001-02</u>	<u>2002-03</u>	<u>2003-04</u>	<u>2004-07 Projection</u>
Events Held	1,826	1,879	1,931	2157	1,850-1,950
Participants	137,278	168,217	157,508	164,867	155,000-170,000

7) **Encore Fees Collected, Course Volume and Membership Level**

	<u>2000-01</u>	<u>2001-02</u>	<u>2002-03</u>	<u>2003-04</u>	<u>2004-07 Projection</u>
Receipted Income	\$139,700	\$124,277	\$138,754	\$153,334	\$138,000-145,000
Number of Multiple Week Courses Offered	69	64	65	73	65-70
Membership	653	657	673	818	685-715

8) **Amount of CUACS Grant/Contract Funding with University Overhead**

	<u>2000-01</u>	<u>2001-02</u>	<u>2002-03</u>	<u>2003-04</u>	<u>2004-07 Projection</u>
Total Generated	\$3,477,000	\$4,114,000	\$4,748,000	\$5,577,995	\$5.0-5.2 million
University Overhead	\$357,000	\$366,000	\$478,000	\$502,866	\$500,00-500,550

C. **Surveys, Evaluations and Other Assessments**

1) **Member/Student/Client Surveys**

- a. **CP&SS Surveys Conducted (number of respondents in parentheses):**
- (ii) Summer Sessions: A Survey of Students' Needs and Expectations (Fall '01) (n=497)
 - (iii) A Survey of Lifelong Education Students' Needs and Expectations (Spring '00) (n=506)
 - (iv) A Survey of Lifelong Educations Students' Needs and Expectations (Spring '94) (n=546)
 - (v) Numerous informal surveys completed at Open House, Orientation and Workshop Events

Key Findings:

Summer Sessions Survey:

Finding #1 – The following three items were nearly evenly identified by survey respondents who attended summer sessions (at NC State or elsewhere) during 2001 as the most important influences on the decision to enroll in summer: 1) is an integral part of my academic course plan (i.e. it enables me to balance my course load throughout the year) (22%); 2) afforded me the opportunity to “catch up” (i.e. as a result of having changed majors) (22%); and 3) afforded me the opportunity to accelerate my pace to facilitate early program completion (20%).

Finding #2 – Survey respondents who attended Summer Sessions at NC State University during 2001 most frequently rated the NC State University Summer Sessions' courses about the same as courses taken during the fall

or spring semester in terms of quality of the learning experience (53%). An additional 32% rated the Summer Sessions courses as being better in quality.

Finding #3 – The most important influence on the decision to enroll in summer sessions at other institutions during 2001 was that the course that they wanted was available at an institution near their permanent residence (56%). Other frequently reported influences were: a) the course that they wanted was available at another institution at a lower price (16%); and b) the course that they wanted was available near their summer employment (16%).

Finding #4 – 'Summer Sessions provide for concentrated periods of course work' (36%) and 'Summer Sessions allow students to move ahead or catch up' (18%) were identified most often by survey respondents as things that the Summer Sessions program does best. 'Provide more courses or course sections in general' was identified most often as the thing the Summer Sessions Program could improve upon (39%).

Finding #5 – Approximately a fifth of the survey respondents who attended NC State University Summer Sessions during 2001 did not work while a third worked 30 hours per week or more outside the home during Summer Sessions. Among respondents who attended NC State University Summer Sessions, 46 percent currently receive some form of financial assistance through NC State University during summer sessions.

Lifelong Education Surveys:

Finding #1 – Respondents were asked to indicate what their immediate goal was in attending NC State, and then to provide additional information if they had interest in pursuing a degree or certificate program. Respondents expressed a strong interest in "degree" programs (59%), and they showed interest in programs offered across all colleges. Demand for programs is strongest in the following areas: Bachelor's Programs – Engineering, Humanities and Social Sciences, and Management; and Master's Degree Programs: Education and Psychology, Engineering, Humanities and Social Sciences, and Management.

Finding #2 – Respondents were asked to indicate whether they planned to attend NC State in a part-time or full-time capacity, and to indicate when they want to take the majority of their classes. Many Lifelong Education students plan to attend NC State on a part-time basis (73%) and in the evenings (49%). While these responses were most prevalent, there were a significant number of individuals who also indicated interest in attending full-time and during the daytime hours.

Finding #3 – Respondents were asked to rate the extent to which each of several items functioned as a barrier to their personal academic success. Available time (1st) and Finances (2nd) present the most significant barriers for these students. These students are often working full-time jobs and are responsible for mortgage/rent payments, family responsibilities, etc., therefore: a) the affordability of their education and b) the flexibility of access associated with it are critical elements impacting their success.

Finding #4 – In an open-ended format, respondents were asked to comment on what the University could improve upon. When you combine the first and third response categories, 36% of the respondents stated that the University needs to improve upon: a) the availability of seats in classes and course sections in general, or b) the availability of areas such as evening courses and programs, and seats in existing classes.

Finding #5 – Respondents were asked to indicate how many hours per week they worked outside the home. This data indicates that two-thirds of the respondents work 30 hours per week or more. This reinforces the fact that available time is a challenge for these students and that flexible access to courses and programs is important for their success.

How Utilized:

The results of these surveys have made significant contributions to the planning and delivery of services to CP&SS constituents. Results from both the Summer Sessions and Lifelong Education surveys have been shared with the campus community (Provost, Provost's Staff, Department Heads, etc.) to facilitate service need awareness and to prompt positive change.

The instruments were developed in such a manner to solicit information that would have significant shelf life. Internally within CP&SS, these results continue to shape program delivery years beyond when each survey instrument was delivered.

Future Survey Plans:

The Lifelong Education survey produced very similar results in '00 when compared with the results obtained in '94. This information further solidified the message that students sent regarding their needs and expectations. Depending on available funding and need. This survey is projected to be administered again in 2006 or 2007.

There are no plans at present to re-administer the Summer Sessions survey in the near future. CP&SS will continue to evaluate program needs through internal and external environmental scanning (capturing national, regional and local developments), and then administer surveys or other instruments as conditions warrant.

b. Encore Survey Conducted:

Encore last conducted a comprehensive member survey in spring 2000 with 39 percent responsiveness. Specific purposes: a) to gather information about member interest in teaching courses and what types of assistance they would need; b) to gauge interest in program expansion; c) to collect information about miscellaneous issues; and d) to obtain member profile information.

Key Findings:

a) Although respondents were supportive of member teaching (92%), a more limited number of members were interested in teaching (21%). If they were interested, they preferred more informal assistance than a multiple-session teaching workshop; b) members were interested in expanding programming, both into the summer months as well as organizing special interest groups;

c) members gave suggestions about groups to contact regarding marketing Encore programs; d) members gave suggestions for courses, teachers and topics; e) members were unclear about Encore committees and what some of them did; and f) we found out general profile information about our memberships, which is relevant to tailoring programming (ages, educational level, work status, etc.)

How Utilized:

This feedback was utilized in future planning/service delivery; a) we have given informal coaching to member instructors who have felt they needed it. We have continued our campaign to encourage members to teach, with slightly upward results (13 members taught in 2002-03 compared to 8 in 1999-2000). Several courses were offered as a direct result of the survey; b) we have expanded programming. We added one six-week course to the summer schedule in May 2001, and have offered 2 six-week classes in that term in subsequent years. This spring, we are going to offer 3-4 courses in the summer. Three special interest groups have been launched as a result of this survey and are thriving – the Encore Arts and Entertainment group, the Encore movie group, and the Encore book group; c) we followed up on the feasible ideas for courses, trips, and marketing contacts; and d) we have tried to increase the visibility of the Encore committees, educate members about the committee members. We have expanded volunteer opportunities for Encore members.

Future Survey Plans:

Encore will finalize a survey by Fall 2004, with member surveys planned in four-year intervals.

c. CTU Customer Survey

A customer survey was administered by CUACS on behalf of CTU. The survey focused on the customer experience with CTU and will serve as a needs assessment for future computer training. The survey was distributed via e-mail in March 2005 and can be completed and submitted on-line.

2) Level of Continuing/Returning Customers

In a customer-driven self-support environment, a valid measure of client satisfaction is the level of repeat customers. For three units of MCE&CE for which this assessment measure is most applicable, the rate of continuing and/or returning customers is relatively high: Encore - 65% of its base membership; CUACS – 70% continuing contract/grant funding sources; MCTC – 75% of its business volume.

3) End-of-Course Evaluations/Pre-Post Testing Differential

All noncredit MCE&CE program units utilize end-of-course participant evaluations, earning an average overall rating of 4+ on a scale of one (unsatisfactory) to five (excellent) for 85 percent or more of their respective offerings. Those offerings evaluated at an overall rating lower than 4.0 or any single criterion with less than a four score are critically reviewed to determine specific reasons. Changes are made before future implementation, or where not feasible, the offering is not rescheduled. Selected OPD noncredit offers administer pre- and post-tests to measure the change in knowledge/understanding based on program information. The average net increase between pre- and post-test scores is 35 points.

D. Composition of MCE&CE Workforce

A four-year MCE&CE review shows a minority representation of approximately 18 percent:

*Other category includes Asian/Pacific Islander, Hispanic, American Indian

2000-01			
SPA	<u>White</u>	<u>African American</u>	<u>Other</u>
Male	24	5	0
Female	57	12	1
EPA			
	<u>White</u>	<u>African American</u>	<u>Other</u>
Male	10	1	0
Female	5	1	0
Total	96	19	1

2001-02			
SPA	<u>White</u>	<u>African American</u>	<u>Other</u>
Male	27	5	0
Female	57	14	1
EPA			
	<u>White</u>	<u>African American</u>	<u>Other</u>
Male	5	0	0
Female	3	1	0
Total	92	20	1

2002-03			
SPA	<u>White</u>	<u>African American</u>	<u>Other</u>
Male	28	4	0
Female	56	15	0
EPA			
	<u>White</u>	<u>African American</u>	<u>Other</u>
Male	7	0	0
Female	4	1	0
Total	95	20	0

2003-04			
SPA	<u>White</u>	<u>African American</u>	<u>Other</u>
Male	35	11	3
Female	51	17	0
EPA			
	<u>White</u>	<u>African American</u>	<u>Other</u>
Male	6	0	0
Female	6	1	0
Total	98	29	3

2004-07 Projection

Maintain 120-130 permanent employees with a 18 to 22% minority presence.
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E. Codicils (copies provided upon request)

- 1) A Codicil to Initiate the Establishment of a DE Noncredit Continuing Education Component (MCE&CE and DELTA)
- 2) A Codicil to Provide Registration, Advising, and Test Proctoring Support Services to Degree Students Enrolled in Distance Education by Utilizing Existing University Infrastructure Support Services Located within ACP&SS (MCE&CE/CP&SS and DELTA)
- 3) A Codicil to Develop, Maintain, and Enhance a Student Services Support Infrastructure for Students Who Fail to Satisfy the Progress Towards Degree Completion Regulation (MCE&CE/CP&SS, Undergraduate Affairs and Provost) – sent to Undergraduate Affairs for review.
- 4) A Codicil to Initiate the Establishment of a Continuing Education Initiative (MCE&CE and Alumni Relations)

**F. Program Agreement Templates (Versions A, B and C)
(copies provided upon request)**

6/6/2005

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