NC State Continuing and Lifelong Education 2022-2023 Unit Level Annual Review and Strategic Plan Progress

The Vice Provost for Continuing Education, the unit directors and the employees of NC State Continuing and Lifelong Education (NCSCaLE) work diligently to provide high quality educational services and program offerings that serve both campus units and external constituents. Working within the fields of continuing education and academic outreach, NCSCaLE offers dynamic programs and high-quality services that align with the strategic goals of NC State University.

NCSCaLE is a key strategic leader, catalyst and partner in the development and delivery of market-driven continuing and lifelong education programs and services that benefit individuals, organizations and communities at all stages of their personal and professional development. NCSCaLE is comprised of the following units:
- Continuing and Professional Education
  - McKimmon Conference and Training Center
  - Office of Professional Development
  - Customized Training and Development
  - Audiovisual and Technology Services
  - Upper Coastal Plain Learning Council
  - The Collaborative
  - Print Services
- Osher Lifelong Learning Institute
- Center for Urban Affairs and Community Services
- Business and Finance Office
- Marketing and Communications
- Office of the Vice Provost

Unlike the previous two years, where COVID-19 restrictions had an impact on programs and finances and major subsidies were needed to support our operations, FY 23 proved to be a highly successful year with many major increases in revenues and programming.

Accomplishments for FY 2022-2023 included:

- NCSCaLE, a $22.6 million operation, had 154,706 enrollments in its various FY 23 programs, which was a 63% increase over FY 22's 95,065 enrollments, and came close to the FY 23 aggressive goal of achieving 160,000 total enrollments. In addition, NCSCaLE held 1,706 programs/events, a 34% increase over the previous year's total of 1,269 programs/events.

- The McKimmon Conference and Training Center (MCTC) saw substantial growth in both revenue and face-to-face events in FY 23. In FY 22 there were 68,983 participants who attended 620 face-to-face events and 27 virtual events for a total of 647 events. Total revenue generated in FY 22 was $1,365,246. In FY 23 there were 112,356 participants (63% growth), who attended 866 face-to-face events and 6 virtual events for a total of 872 events (a 35% increase from FY 22) with total revenue generated increasing to $1,995,728 (a 46% increase from FY 22). Also, for the first time in three years, MCTC was able to move 12% of the entire year's MCTC revenues to R&R.   We were successful in achieving 100% of our deferred revenue (deposits) to fiscal year 2024, $36,320.

- In its second full-year, our digital skills bootcamps partnership with ThriveDX saw significant financial and enrollment success. For FY 23, 1,767 participants enrolled in an introductory one month course, and 550 participants continued on to enroll in 9-month intensive bootcamps. To date, we are aware of 259 individuals who have successfully secured employment either after completing a bootcamp or while still attending a bootcamp, with 223 of those individuals being placed in FY 23. For this fiscal year, we generated $1,333,673 in net revenue to invest in new initiatives and seed fund new positions to grow the division, most notably in our marketing and communications area. We also shared $129,848 with academic departments. While we have phased out the Digital Marketing initiative due to decreasing enrollments, we are still trending very well for our cybersecurity and software development boot camp offerings. Our contract with the company runs through December 14, 2023, and we are in the process of negotiating a new contract with ThriveDX.

- The Office of Professional Development (OPD) had a 45% increase in revenue from FY 22 to FY 23 ($3,293,679 in FY 22 to $4,768,001 in FY 23). We were successful in achieving 91.57% of our deferred revenue to fiscal year 2024, $827,574. These funds constitute registration pre-collections and deferred revenue for FY 23 expenses not occurring until FY 24.

- In FY 23 OPD saw significant growth in its conferences division. In 2021-2022 OPD managed 12 conferences and had 4,601 attendees. In 2022-2023 OPD oversaw 22 conferences (86% increase) and had 7,281 attendees (56% increase). OPD also had 1,886 enrolled students in 262 professional development courses.

- The Center for Urban Affairs and Community Services (CUACS) successfully secured a $47.5 million extension in their contract with the Department of Public Instruction. In addition for FY 23, CUACS generated a total of $9,444,952 in contract funding that supported its important initiatives.

- The Osher Lifelong Learning Institute at NC State offered 97 in person courses, 13 Zoom courses, 71 in person lectures, 14 Zoom lectures, 18 study trips, and 7 events. Total enrollment for courses and lectures (in person and Zoom) was 5,835. Total enrollment for study trips was 422. Total enrollment for events was 862. Total enrollment for FY 23 among courses, lectures, study trips and events was 7,119. (Compared to FY 22 numbers: 114 courses, 66 lectures, 20 study trips, and three events with a total enrollment of 5,874. OLLI membership totaled 1,179, an eight percent increase from FY 22's 1,091, and a 13.7 percent increase from FY20-21's 1,030.

- NCSCaLE hired many key positions to support growth which are highlighted in unit sections below and included Eliza Kiser being hired as the new Director of the Osher Lifelong Learning Institute (OLLI) and Hilen Flores being hired as the Executive Assistant to the Vice Provost for Continuing and Lifelong Education.

- As part of the university all funds budget process, NCSCaLE successfully requested and received:
  - $805,000 for MCTC Restroom Renovation
  - $761,730 for LED Parking Lot Lights
  - $75,000 (salary) for a new Project Manager position

- OLLI's former director, Tricia Inlow-Hatcher, was recognized for her contributions to the field of continuing education and lifelong learning with the William L Turner Award.

NCSCaLE Goals for FY 2023-2024 include:

1. Increase enrollments in NCSCaLE programs by 3%.

2. Successfully implement 100 year anniversary programming and awareness of a century's worth of impact.

3. Utilize the assessment plan to successfully measure our success on our strategic plan goals:

    a. Striving and attaining organizational excellence throughout our entire division.
    b. Implementing business practices that are aligned with expected best practices at NC State University.
    c. Becoming world-class in strategic program development that includes strategic market research and data-driven decision-making.
    d. Continuing to develop and deliver high quality impactful academic outreach programs and technical assistance and research services to the individuals, organizations and communities of North Carolina.
    e. Serving as a model for a best practice workplace that champions respect and professional growth, and fully embraces diversity, equity and inclusion.

Challenges: Recommendations and Concerns for the Future:

While NCSCaLE overall had a highly successful year, one area of focus that continues to see more moderate growth is in our programming collaborations with the colleges and academic departments. Significant outreach to colleges and departments was made in FY 23 to discuss programming collaborations and opportunities. A new non-credit certificate in Design Thinking was developed and will be launched in Fall 2023, and we also had good collaboration with the Data Science Academy. We will use these successful examples, along with our work on the university-wide non-degree credentials task force, to leverage new programming opportunities in FY 24.

Our continued success with the digital skills bootcamps has afforded us the opportunity to grow the capacity of our marketing and communications team, and to consider other investment opportunities.

With 2024 being the 100 year anniversary of the NCSCaLE division, we will utilize this occasion to explore long-term fundraising opportunities including upgrades to the McKimmon Conference and Training Center.

The remainder of the report focuses on NCSCaLE's various unit accomplishments for FY 23 and specific unit goals for FY 23 including their relevance to the university's strategic plan and the division's strategic plan. Within the contents below, scope and volume of activities are outlined, along with major initiatives, major new appointments, kudos, professional activities and recognition, along with challenges and concerns.

McKimmon Conference and Training Center (MCTC): *(supports University Goal 1: Empower Students for a lifetime of success and impact and Division Goal 4: Continuing to develop and deliver high quality impactful academic outreach programs and technical assistance and research services to the individuals, organizations and communities of North Carolina):*

MCTC saw substantial growth in both revenue and face-to-face events in FY 23. In FY 22 there were 68,983 participants who attended 620 face-to-face events and 27 virtual events for a total of 647 events. Total revenue generated in FY 22 was $1,365,246. In FY 23 there were 112,356 participants (63% growth), who attended 866 face-to-face events and 6 virtual events for a total of 872 events (a 35% increase from FY 22) with total revenue generated increasing to $1,995,728 (a 46% increase from FY 22). Also, for the first time in three years, MCTC was able to move 12% of the entire year's MCTC revenues to R&R.   We were successful in achieving 100% of our deferred revenue (deposits) to fiscal year 2024, $36,320.

[Total 22-23 Events with Attendance Sheet](#)

MCTC had 102 new accounts and events in FY 23. Some of the [New Business](#) accounts included:

- Bank of America
- Brightly Software
- NC Space Grant - Reach for the Stars
- NC Workforce Development Leadership Initiative
- NC Department of Insurance - Home Inspector Monthly Licensing Exam
- North Carolina School of Science and Mathematics - Board Retreat
- The University of North Carolina System - Teaching Fellows
- Arts Day NC!

In terms of technology upgrades, four new screens were installed in Room 1, 2 measuring 23' by 12' and 2 measuring 17' by 10', to increase visibility in the room. We added 4 more Zoom Webinar licenses, so we have a total of 8 now, which enabled us to pull off the State Energy Conference this past Spring. Additionally, we purchased two extra 4K cameras to provide quality video for our live streams. Very late in 21-22 we acquired 4 additional Pearl Mini streaming devices that enabled us to increase the number of simultaneous live-streams or recordings to 7. We purchased 3 Stream Decks that integrate with OBS to give clients more complex recordings with effects and superimposed text. We increased the number of digital signs in the building by 4, adding signs at rooms 100 and 232 as well as a pair of directory signs (1 upstairs and 1 downstairs).

In March, Room 14 was converted from a computer lab to a flex-use classroom, enabling the room to be utilized far more frequently.

- Increase MCTC rates and some equipment rates by 5% 23-24 Rate Increase Worksheet. Here are some of the significant changes noted by the events team: 23-24 Changes of Note.
- Continue the new management and staffing structure implemented in FY 23.
  - One of the goals for FY 2022-2023 was exploring filling the Assistant Director of MCTC's position. When Greg Emma left the Assistant Director position, the Director of CPE took over the management of MCTC. After many meetings and discussions with the event team and especially the two event coordinators, Carrie Bjorkquist and Carmen Dunn, it was decided that the Director of CPE would continue managing the event team. This new staffing model has led to positive staff morale, improved communications, and significant growth in all areas of events.
  - The hiring of a new Associate Director of CPE Operations and Project Management in May of 2023 provided an opportunity for this individual to oversee and manage print services. We believe that this new staffing model will help stabilize and eventually grow print services in FY 24.
- Develop process and pricing structure for online/virtual offerings for external clients using a combination of Zoom, Mediasite, and Slack Technologies; integrate virtual conference services with existing services.
- Begin projects such as facility projects, LED parking lot lights, installation of new double doors in the annex and the installation phase of restroom renovations.

The Office of Professional Development (OPD): *supports University Goal 1: Empower Students for a lifetime of success and impact; University Goal 2: Ensure preeminence in research, scholarship, innovation and collaboration; University Goal 3: Expand and advance our engagement with and service to NC and beyond, defining the standard for a 21st century land-grant university; University Goal 4: Champion a culture of equity, diversity, inclusion, belonging and well-being in all we do; and the five division strategic plan goals).*

- Currently OPD is working to empower students for a lifetime of success by providing non-traditional students a variety of non-credit programs, certificate programs, professional development classes, customized training, and youth programs. In addition to the programs that OPD runs, the conferences that OPD manages have become a vital part of our portfolio.

- The Office of Professional Development had a 45% increase in revenue from FY 22 to FY 23 ($3,293,679 in FY 22 to $4,768,001 in FY 23). We were successful in achieving 91.57% of our deferred revenue to fiscal year 2024, $827,574. These funds constitute registration pre-collections and deferred revenue for FY 23 expenses not occurring until FY 24.

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- In FY 23 a major goal was to improve operational efficiency in the Office of Professional Development. This was accomplished by restructuring the staff. The position of Assistant Director was not refilled with the resignation of the previous AD. Also a decision was made to move away from part-time program assistants to a staff of all full time employees. And, in May of 2023 after a year's search an Associate Director of Operations and Project Management was hired. The person hired in this position is working with the OPD team to evaluate operational processes, help to evaluate the efficiency of the different OPD areas, and assist the CPE Director in evaluating overall performance by gathering, analyzing and interpreting data and metrics.

- OPD partnered with the Department of Public Instruction (DPI) to administer their School Nutrition Grant. With a budget of over $437,000, OPD coordinated and planned over 27 events for DPI school nutrition employees. Those 27 events had 1,617 registrations in the various training courses and offerings across the state.

- TTS continued to see declining enrollment and revenue. Projected revenue in FY 23 is $72,000 down from $170,000 in FY 22.

- The Leadership Coaching for Organizational Performance was revised in the Spring of 2021 with a new organization, Heidrick & Struggles, providing the instructors and the curriculum. In FY 23 there were a total of 26 registrants and total revenue was $278,700.

- In 2022, OPD entered into an agreement with Blue Summit Consulting to provide Project Management training. Under the new partnership, the certificate program now has 17 new, revamped, or reimagined courses and has begun to see increased inquiries for the program. To date, we have had 143 participants to enroll and complete various offerings of these new courses. Starting in September, in-person offerings will be added to the schedule to supplement the ongoing virtual classroom offerings.

- Another area that we began to focus on was exploring new academic opportunities. These new opportunities include remote and online learning, new innovative programs, and looking for new internal and external collaborations to grow enrollment. OPD saw modest success in this area.

    - A partnership was entered into with The College of Design. The first certificate program in DesignThinking was developed and will be offered in September.

    - OPD also collaborated with The Data Science Academy to provide administrative support for a DHHS DCDEE program.

    - Finally, there were initial steps taken to see if a partnership between OPD and The Poole College of Management's executive education program could be formed.

- In FY 23 OPD awarded over 350 digital badges and also shared badges with The Data Science Academy and with Alyson Wilson at the Office of National Security and Special Research Initiatives.

- All OPD staff participated in University provided staff development training and education courses in the areas of diversity, equity, and inclusion.

- The Director of CPE's primary goal in 2023-2024 is to continue to provide the OPD staff with a sense of organizational stability, allowing for continued growth in programs. Over the last year there has been a lot of organizational change that created uncertainty among OPD staff. Major progress has been made by hiring a team of individuals who are excited to learn and help OPD grow. A key to providing this stability is communication, transparency, and articulating a vision for the work being done. The Director of CPE's job is to provide continuous feedback and help each person achieve their goals. He believes that by challenging and nurturing each staff member, OPD will see continued growth in their areas of strength (conferences) and improve in new program development, customized and corporate training, and operational efficiency. The director is very excited about the staff in place going into FY 24.

- Over the next year, OPD will work with NC State colleges to develop three new non-credit certificates. These programs will be market driven and competitively priced.

- The goal of the OPD professional development courses will be to increase the number of courses from 262 to 280.

- OPD is looking to increase the number of conferences from 22 to 24.

- New programs will be developed in new creative technologies for the industries we serve. Some potential programs would be developed in the areas of artificial intelligence, UX and UI design, blockchain, digital marketing, augmented/virtual reality, data science and other innovative programs.

- The goal is to create, deliver, support, and expand high quality academic and professional non-credit certificate programs in formats that meet the needs of nontraditional students and challenge them to achieve academic excellence. It is critically important that we work closely with the deans and the faculty of the colleges at NC State. We need to work with faculty, staff, and administration to create short non-credit certificate programs, both in-person and online, that allow the adult learner to earn a credential in two to three months. These non-credit certificate programs will be academically rigorous and will meet the needs of the industry CPE and NC State serve.

- These changes will create exciting opportunities for continuing education, and it is in this context that CPE is setting out a plan that will be guided by market research to develop new non-credit certificate programs. CPE can be the leader in the state in providing relevant courses, certificates and programs that connect students with the needs of employers.

Customized Training and Development (CTD): *(supports University Goal 1: Empower students for a lifetime of success and impact; and Division Goal 4: Continuing to develop and deliver high quality impactful academic outreach programs and technical assistance and research services to the individuals, organizations and communities of North Carolina):*

Customized Training and Development is recognized as a resource by private, public, governmental and military organizations to obtain high-quality customized continuing education for their staff.

In FY 23 the CTD programs were without leadership for almost the entire year. The manager of Customized Training took a leave of absence in August 2022 and retired on December 31, 2022. Because of this, little customized training was done in FY 23 (see below for the limited offerings). In May of 2023, a new person was hired as the Associate Director of Customized Training and Partnership Development.

Course ID	Course Title	Instance ID	Month	Start Date	End Date	Instance Format	Total Registrations
MCE-OPD-N-FOUNDP	Foundations of Project Management	000001	August	8/30/2022	8/31/2022	Classroom	18
MCE-TT-N-EXCELL1	Excel Level 1	000019	August	8/23/2022	8/23/2022	Classroom	12
MCE-TT-N-EXCELL1	Excel Level 1	000021	September	8/31/2022	8/31/2022	Classroom	14
MCE-TT-N-EXCELL2	Excel Level 2	000019	September	9/8/2022	9/8/2022	Classroom	11
MCE-TT-N-EXCELL2	Excel Level 2	000020	September	9/14/2022	9/14/2022	Classroom	13
MCE-TT-N-EXCELL2	Excel Level 2	000021	September	9/20/2022	9/20/2022	Classroom	10
MCE-TT-N-EXCELL3	Excel Level 3	000013	September	9/22/2022	9/22/2022	Classroom	14
MCE-OPD-EXCELL2	Excel Level 2	000024	November	11/16/2022	11/16/2022	Classroom	17
MCE-OPD-EXCELL2	Excel Level 2	000025	November	11/16/2022	11/16/2022	Classroom	17
MCE-OPD-N-FAGILE2	Foundations of Agile Project Management - 2-Day	000001	January	12/1/2022	12/2/2022	Classroom	8
MCE-OPD-N-ENOTAR	North Carolina Electronic Notary Public Course	000006	February	2/23/2023	2/23/2023	Classroom	9
MCE-OPD-N-MBLSHS	The Leadership Styles and Impact	000002	March	3/16/2023	3/16/2023	Classroom	15
MCE-OPD-N-MBLSHS	The Leadership Styles and Impact	000001	March	3/16/2023	3/16/2023	Classroom	15
MCE-OPD-N-SHLCC	DHHS Leadership Management Development Certificate	000001	April	3/15/2023	5/30/2023	Classroom	20
MCE-OPD-N-SHLCC	DHHS Leadership Management Development Certificate	000002	April	3/15/2023	3/15/2023	Classroom	20
15						15	213

CTD Goals for FY 2023-2024 include:

- Will generate $175,000 in customized training programs for the Office of Professional Development including technology training programs, project management, and leadership development.
- Work with NC State University faculty and staff to develop at least one new unique training for university units and outside organizations.
- Will work with MarComm to update the digital marketing plan to promote Customized Training and Development programs to units of the university, government, and the private sector and promote new programs.

The Upper Coastal Plain Learning Council (*supports University Goal 1: Empower students for a lifetime of success and impact; University Goal 3: Expand and advance our engagement with and service to NC and beyond; and Division Goal 4: Continuing to develop and deliver high quality impactful academic outreach programs and technical assistance and research services to the individuals, organizations and communities of North Carolina):*

- The Upper Coastal Plain Learning Council (UCPLC) was created by HB 2436 in 2008 to address 2008 UNC-Tomorrow recommendations. The UCPLC serves Edgecombe, Halifax, Nash, Northampton and Wilson Counties; UCPLC utilizes their appropriated budget to support three primary goals: 1) teacher retention and student success; 2) healthcare initiatives; and 3) workforce development.

- The Wisdom Tooth Program, the UCPLC's premier program, continued to thrive and grow. Each year the demand for this dental health outreach continues to be greater than the funds can support. The UCPLC provided supplies and sessions of the Wisdom Tooth Program to 19,325 adult and child participants in 566 education sessions. As of today, more than 62,500 people of all ages in the five-county stakeholder area have been impacted by this oral health education program. It is our pleasure to note this is a 44% increase in one year!

- The Hometown Hires program continues to impact generational poverty and this initiative continues to grow. The UCPLC continues to work with business and industry communities in the area to continue to support the program. Peacemakers of Rocky Mount, the managing partner of Hometown Hires (HTH) Nash and Edgecombe County, continues to host week-long Boot Camps each month.

- The Wilson Engineering Camp returned during the Summer 2023 on the campus of Wilson Community College where the campers had access to a state-of-the-art robotics teaching facility and the Marine Corps Fab Lab, a mobile STEM Lab. The Wilson Engineering Camp which is offered annually continues collaboration with The Engineering Place at the College of Engineering at NC State University and Wilson Community College. The UCPLC has continued to expand the Wilson Engineering Camp to host a combined week of Elementary Camp and Middle School Camp. Space and staffing have enabled the camp to plan to host fifty seven middle elementary students to attend camp. It is important to note that we have nineteen females attending this historically male camp. Camp teachers returned to their school systems and lead STEM based instruction to their peers.

- The UCPLC has created a new program, Enrichment Educators, where current educators offer enrichment to area organizations. The first group of enrichment educators worked with twenty five hispanic children (PreK-12 grade) with reading comprehension for the younger students and college/career opportunities for the older students during the 2022-2023 school year. Our Enrichment Educators have served 629 students for this school year.

- Since the pandemic, there has been increased awareness of individuals' mental health. Mental Health First Aid is a national program that teaches the skills to respond to the signs of mental illness and substance use. The UCPLC continues to offer MHFA training

to the local community. Through collaboration with Area L AHEC, the UCPLC has certified 40 new Mental Health First Aiders during the 2022-2023 year.

- The UCPLC provided one day of Professional Development in Robotics to 44 teachers within Edgecombe, Nash and Wilson counties.

- The UCPLC modeled STEM instruction and facilitated monthly STEM activities with the entire fourth grade at a local elementary school in Nash County serving 124 elementary students.

UCPLC Goals for FY 2023-2024 include:
- Expand the Enrichment Educator program to include additional collaborations with other community agencies.
- Complete three community sessions of Mental Health First Aid (Adult).
- Continue to grow organically the Wisdom Tooth program through outreach in the community and collaboration with agencies.
- Create an inventory control process for the launch of the UCPLC STEM Closet.
- Expand the opportunities for professional development for local educators.

The Collaborative at the Gateway Technology Center (TCGTC): *(supports University Goal 1: Empower students for a lifetime of success and impact); University Goal 3: Expand and advance our engagement with and service to NC and beyond; and Division Goal 4: Continuing to develop and deliver high quality impactful academic outreach programs and technical assistance and research services to the individuals, organizations and communities of North Carolina):*

- There were 600+ people served during fiscal years 22-23 with the TCGTC. Services reflect higher education classes, professional and doctoral degree programs, face-to-face non-degree professional and workforce development outreach, face-to-face CEU credit programs, K-12 youth developmental classes and youth enrichment summer camps from both North Carolina State University and East Carolina University (ECU). NC State NELA program is now the NC Principal Fellows Program. This new cohort is called Wolf/NELA 2025 Cohort which includes 11 administrators.

- East Carolina University's Master of Public Administration program has gone to an all online format.

- The Collaborative has been able to resume in-person proctoring. We were able to schedule 30 exams to students from NC State and the University of Utah. The UNC Online System went offline in the spring of 2022. The Collaborative is still open to proctoring through the individual school portals as well as Smarterproctoring.

- The Collaborative has continued the partnership with the NC State College of Education and NC-MSEN to host a face to face STEM Scholars program. There were 52 students from Nash, Edgecombe, Wilson, Halifax, Pitt, North Hampton, Wayne and Wake counties participating in the program. Sophia Crudup was able to secure several scholarship spots to serve Title 1 students from area high schools in Johnston County.

- The Collaborative offered the Veterinary Camp with the NC State College of Veterinary

Medicine in-person at the GTC in June 2023 with 44 students. The reputation of the camp has become a staple for the area youth with a long waiting list.

- The Collaborative will offer a FREE week long Math Camp for elementary students in grades 3-5 during the summer of 2023. Participants will be engaged in mathematical problem solving and algebraic understandings based around real world situations. The curriculum was infused with other core disciplines such as ELA and STREAM to allow students to build a natural connection of how math relates to them. Some of the topics these young mathematicians will explore are budgeting and menu design, geometry exploration allowing a correlation to engineering a geometric habitat, and measurement in the everyday world where they will participate in the first annual camp olympics.

- The Collaborative is providing support for an Adult Literacy Program where participants can prepare to take the GED test. This program is designed to help adults who have experienced educational barriers to employment. This program will continue to provide academic support to area adults who are seeking their High School Equivalency. Sophia Crudup is still navigating the process of becoming a GED test center to accommodate the Collaborative Literacy Program. Two GED exams have been completed successfully.

- In 2022-2023, The Collaborative offered Science Saturday programs that served more than 100 students on nine Saturday mornings. Offerings ranged from robotics to music to biology. This pilot program was developed to bridge the gap between summer camps and service throughout the school year.

- The Collaborative has partnered with Nash Community College (NCC) and Brick Scholars to bring LEGO Robotics/Coding enrichment for area schools, Wayne County Boys & Girls Club, Rocky Mount Boys & Girls Club, and the Conetoe Family Life Center serving more than 300 students. Brick Scholars worked with students over a six week period accumulating many hours of coding and builds. NCC was also able to offer dissections to middle school students.

- The Collaborative will offer a free week long camp for students in grades 6-9 during the Summer 2023. In this camp, students will take part in learning and developing their skill set to operate 3D printers.

- The Collaborative has developed a partnership with Mini Money to add a youth financial literacy and entrepreneurship camp to the 2023 camp programs.

- The Collaborative will offer a Neurodiverse STEAM Camp for students on the spectrum. With STEM careers being a growing part of our future, this inclusive camp will introduce the ways in which STEM supports Neurodiversity.

- The Collaborative is actively searching for ways to improve student exposure to the Arts. Currently, plans are being developed to design a camp dedicated to Art and Music. For 2023 we have incorporated those themes in our current programs. This is in light of the recent trend of eliminating many extracurricular activities offered in the schools since the pandemic.

<mark>The Collaborative Goals for FY 2023-2024 include:</mark>
- Continued outreach from NC State and ECU to the educationally underserved students located in eastern NC.
- The Collaborative would also like to continue to use resources to support local community colleges and schools' educational needs to enhance their current offerings.

<mark>McKimmon Center Print Services</mark> *(supports University Goal 5: Improve university effectiveness through transformative technologies, cutting-edge processes and actionable data; and Division Goal 2: Striving and attaining organizational excellence throughout our entire division):*

In October of 2022, Bill Frothingham, the Print Services Technician, retired. In November, Mark Senter was hired as the new Print Services Technician.   Also the new Associate Director of CPE Operations and Project Management in May of 2023 will oversee and manage print services. We believe that this new staffing model will help stabilize and eventually grow print services in FY 24.

- Print & Mail Services completed the perfect bound books for 97th ACS Colloid & Surface Science Symposium in June 2023.
- Tab Index was added as a new vendor for book binding and other finishing services.
- Proposed saddle stitch binding to reduce total costs for customers.

<mark>MPS Goals for FY 2023-2024 include:</mark>
- Increase customer base within NCSU.
- Implement a tracking system to streamline ordering and billing processes.

<mark>CEU Administration:</mark> *(support University Goal 1: Empower students for a lifetime of success and impact; and Division Goal 3: Becoming world-class in strategic program development that includes strategic market research and data-driven decision-making)***:**

CEU administration continued to support on-campus and external clients with revenues of $51,944 in FY 23 as compared to $45,909 in FY 22.

<mark>CEU Goals for FY 2023-2024 include:</mark>
- Increase annual revenue attainment by 10% through enhanced new client engagement and marketing.
- Provide training to appropriate departments on CEU processes and procedures.
- Ensure that all CEU processes and procedures are in digital formats.

<mark>Challenges: Recommendations and Concerns for the Future - Continuing and Professional Education:</mark>

A major challenge for the Continuing and Professional Education division in FY 23 was the turnover in leadership positions. However, these changes have led to opportunities to streamline the organizational structure and improve communication among the different units.

With a number of full-time staff being hired (see list below), Continuing and Professional Education is in a positive position going forward in FY 24.

- In April 2022, after 15 years at NC State and 8 years as the assistant director of MCTC, Greg Emma resigned to pursue other opportunities.
- In July 2022, Jennifer Lawson resigned as the assistant director of the Office of Professional Development.
- In June 2022, Kyle Wallace, the Executive Assistant to the Vice Provost for Continuing and Lifelong Education retired, and when she left, the CEU program that she oversaw was turned over to the Office of Professional Development.
- In October 2022, Bill Frothingham, the manager of Print Services, retired.
- On December 31, 2022, Andy Billingsley, the Manager of Customized Training and Development, retired.
- In January 2023, after almost 20 years with the marketing department at McKimmon, Janice Sitzes accepted a new position as the Director of Continuing Education with the College of Natural Resources.
- Finally, in February 2023, the rest of the marketing team was either transferred (Jeff Barnes and Michelle DePietro) to DELTA Marketing, Communications Department (MarComm) or left NCSCaLE.

Staff: Major new appointments:

- In FY22-23 the following full-time staff were hired:
    - **Annette Jeffes**, Associate Director of Customized Training and Partnership Development
    - **Savannah Vince,** Associate Director, Continuing and Professional Education Operations and Project Management
    - **Jamie Merritt,** Program Coordinator, Office of Professional Development (promoted into position)
    - **Mark Senter,** Print Services Technician
    - **Nabilah Mohammed,** Administrative Assistant, to the Director of CPE
    - **Leslie Brim,** Program Assistant, Office of Professional Development
    - **Deja'h Brown,** Program Assistant, Office of Professional Development
    - **Brianna Jones,** Program Assistant, Office of Professional Development

Osher Lifelong Learning Institute (OLLI): *(supports University Goal 2: Ensure preeminence in research, scholarship, innovation and collaboration; University Goal 3: Expand and advance our engagement with and service to NC and beyond, defining the standard for a 21st century land-grant university; University Goal 4: Champion a culture of equity, diversity, inclusion, belonging and well-being in all we do; University Goal 7: Elevate the national and global reputation and visibility of NC State; Division Goal 3: Becoming world-class in strategic program development that includes strategic market research and data-driven decision-making; Division Goal 4: Continuing to develop and deliver high quality impactful academic outreach programs and technical assistance and research services to the individuals, organizations and communities of North Carolina; and Division Goal 5: Serving as a model for a best practice workplace that champions respect and professional growth, and fully embraces diversity, equity and inclusion):*

Accomplishments:

- This year, communication, relationship-building, and taking a measured and steady approach to change were key themes as three of OLLI's four team members were in their first year of employment during this year. Internally, the implementation of bi-weekly staff meetings, restructure of how events are handled by our team, and shifting staff committee liaison assignments have helped our team grow together and function efficiently. Externally, our focus has been on frequent, clear, transparent communication with OLLI members to help them get through OLLI's significant staffing transitions.

- On October 5, 2022, OLLI launched a members-only weekly email newsletter to provide a means to connect with members, establish a regular channel for promoting programs, create a regular venue for recognizing volunteers, to establish a means for getting eyes on regular announcements and to increase the overall visibility of the wide array of programs and activities OLLI provides. Each email features a brief greeting from Director Eliza Kiser, a segment on upcoming classes, study trips or events, a profile of a volunteer and their contributions to OLLI, and a way that members can be involved with OLLI outside of the classroom. The MailChimp analytics line up with the positive feedback received from members on the communications week after week. Of the 48 emails sent out since October 5, 38 have an open rate of 75% or higher (22 of these have an open rate of 80% or higher) of our 1,128 subscribers.

- OLLI Staff sent out an in-depth Member Survey in February 2023, the first survey of our membership since 2020. 329 members (or 29% of the membership at the time of the survey) participated. Survey data verified that 87.3% of members are very satisfied with their experience, 10.6% of members are somewhat satisfied, and 2% of members are somewhat dissatisfied. Collected data was used to shape our program planning for Fall 2023 and gave us data to determine how large our current and potential Zoom program audience is and to provide Fall Zoom programming options for this audience.

- With support and input from OLLI's Advisory Council Executive Committee, the addition of a new operating committee – the Inclusion and Accessibility Committee – to Advisory Council was proposed and adopted following a six week period for questions and suggestions from Advisory Council members. This group will focus on the member's experience of OLLI and advising across all committees how to remove barriers to participation to older adults with disabilities or who are a different race, ethnicity or religion than the typical current OLLI member.

- Engagement with OLLI gave NC State faculty the opportunity to educate members of the general public about the importance of the university's mission and research impact, which is complementary to OLLI's goal to encourage members to stay current on a wide range of topics.

- During the fall and spring semesters, OLLI collaborated with the College of Education in their Psychology of Aging class. In each semester, OLLI recruited members (20 for fall and 44 for the spring) to participate, providing OLLI members with an experience engaging with the university and with students and providing Psychology of Aging students with an opportunity to engage with people who are going through the stage of life they are studying.

- In the fall and spring semesters OLLI continued our collaboration with Robin Kube, senior lecturer of foreign languages and literature at NC State, by connecting OLLI members with international students for Conversations and Coffee. (Through this initiative OLLI members are paired with international students so the students can improve their conversational English, and OLLI members learn more about the students and their background. Twelve international students were connected with OLLI members this year.

- OLLI members contributed generously to NC State's Feed-the-Pack on-campus food pantry for the fifth year in a row. Two week-long food drives, which included classroom donations and drive-through collection in November and in April, collected a total of 1,770 lbs (a 264 lb decrease from last year, attributed in part to the increased emphasis on the importance of donations of toilet paper, toiletries and feminine products and in part, likely, to the impacts of inflation on our members' buying power).

- OLLI made a concerted effort to deepen our relationship with Association of Retired Faculty (ARF) this year, viewing ARF members as both potential members and potential instructors. OLLI Director Eliza Kiser visited three ARF luncheons, engaged ARF members in OLLI's Spring Kick Off and hosted an OLLI/ARF meet and greet in March.

- OLLI's 5th year participating in NC State's Day of Giving 2023 was our best yet. OLLI members, friends, and staff made 418 gifts to OLLI totaling $14,737. OLLI won the midnight to 1 a.m. Most Gifts Challenge, which resulted in $1,000 in Bonus Funds. OLLI won the 7 a.m. to 8 a.m. Most Gifts Challenge, which resulted in $1,000 in Bonus Funds. OLLI won the 5 p.m. to 6 p.m. Most Friend Gifts Challenge, which resulted in $1,000 in Bonus Funds. OLLI finished #5 on the University Priorities Leaderboard, which earned $2,725.61 in Bonus Funds. On the Power Your Pack Leaderboard, which compared 2023 results to previous years, OLLI made an additional $210.70. We're particularly proud of our communications and social media around the event. Through consistent, engaging messaging in email and social media campaigns, we directed our members to give smarter so that their gifts could earn the most bonus money possible. Social media posts were clever and effective; we got a retweet from NC State's official Twitter account. OLLI's annual giving, including DoG, is $32,138. This amount seems in line with prior years (relative to the current membership) if you consider that no sponsorships contributions were collected this year.

- The Osher Lifelong Learning Institute at NC State offered 97 in person courses, 13 Zoom courses, 71 in person lectures, 14 Zoom lectures, 18 study trips, and 7 events. Total enrollment for courses and lectures (in person and Zoom) was 5,835. Total

enrollment for study trips was 422. Total enrollment for events was 862. Total enrollment for FY 23 among courses, lectures, study trips and events was 7,119. (Compared to FY 22 numbers: 114 courses, 66 lectures, 20 study trips, and three events with a total enrollment of 5,874.)

- Membership totaled 1,179, an eight percent increase from FY21-22's 1,091, and a 13.7 percent increase from FY20-21's 1,030, but still far from pre-pandemic levels of 1,700+.

- On OLLI's end-of-year course evaluations, participants gave an average overall rating of 4.76 for instructors and 4.71 for courses, and a rating of 4.8 for their overall OLLI experience (on a 5-point scale, where 5=Excellent). Evaluations for the study trips were also strong, with respondents giving an overall rating of 4.83 for those educational experiences. These ratings are slightly higher than FY22 (FY22 ratings: 4.7 instructors/courses, 4.8 overall experience, and 4.8 study trips).

- 63% of OLLI's members from FY 22 renewed for FY 23. 71 members (or 6% of the FY22-23 membership) returned from FY20-21 or before. 64% of FY22-23 members were returning from prior membership. This renewal rate is lower than a pre-pandemic "normal" renewal rate (and last year's renewal rate) closer to 75%. (Renewal rate for last year was 73%.)

- 82% of OLLI's courses and lectures were newly developed for this program year (compared to 86% for FY 22).

- This year 186 instructors offered 223 programs at OLLI at NC State. 44 of those instructors were NC State faculty, staff or emeriti; 12 were faculty, staff or emeriti from other colleges and universities, 108 were from the community, and 28 were OLLI members. Together, they offered 878 hours of instruction.

- Twenty-four courses/lectures/study trips gave OLLI members the opportunity to develop their cultural competency, through subjects such as literature, history, economics and reflective courses on unconscious bias and race. The courses were developed by OLLI's Program Development Committee.

- OLLI's former director, Tricia Inlow-Hatcher, was recognized for her contributions to the field of continuing education and lifelong learning with the William L Turner Award. Tricia was nominated by OLLI's new director Eliza Kiser, program founder Chuck Korte, current and past OLLI Advisory Council members John Hemperly, Carol Rahmani, and Tom Hutchinson, and Osher NRC executive director Steve Thaxton.

OLLI Goals for FY 2023-2024 include:

- The return to in-person learning has made it tempting to drop Zoom programming as instructors seem more reluctant to engage in Zoom, preferring classroom interactions, however, our member survey shows that there is still a demand for Zoom programming by over 50 percent of our members. We are developing partnerships with other OLLIs to collaborate on the production of Zoom programs. By collaborating with other OLLIs, we can plan and produce two Zoom programs, but offer four to our members. We are embarking on this in the Fall semester through collaborations with OLLI at UNC Wilmington and OLLI at Florida International University. We hope to expand this effort in

the Spring and Summer semesters to continue to sustain and offer a quality Zoom program.

- With changes in NC State's/NCSCaLE's Business Office processes, a changed travel vendor landscape, and an almost entirely new OLLI team in place, resuming multi-day travel for the first time since Fall 2019 has been difficult and has, so far, eluded us. In 2023-24, it's essential that OLLI successfully relaunch this arm of our program.

- We have set an ambitious membership goal for 2023-24, aiming for 1000 members for the Fall semester and 1400 members by end of year. There are two primary challenges with achieving this goal: first, ensuring that marketing efforts hit the right audiences hard in the Fall semester when acquiring members has the greatest potential impact on the remainder of our year, and, second, right-sizing our program offerings to projected membership levels.

- Volunteer recruitment and retention is always essential to OLLI's success, but is particularly important this year. During the pandemic, OLLI lost 2-3 years in the normal process of building relationships to cultivate future volunteers. During that time, we were fortunate to have many existing volunteers agree to continue their terms longer than typical. It will be key to recruit and put in place new volunteers this year so that they can learn from existing volunteers.

- OLLI's most recent strategic plan was developed in 2014 or 2015 for 2015-2020. We plan to undertake the process of developing a new strategic plan with our members, committees and Advisory Council this year.

- Like most OLLIs across the country, the majority of OLLI at NC State members fall between 65 - 75 years of age. Attracting younger members is key to the program's future sustainability. In the coming year, we'll be expanding evening classes as a first step in broadening the accessibility of our program to younger members.

Staff: Major new appointments, kudos, professional activities and recognition

- Following Tricia Inlow-Hatcher's retirement in August 2022, Eliza Kiser came onboard as OLLI's Director on September 19, 2022.
- The emphasis on study trips and travel has been increased with Lindsey Hale's role as Special Programs Coordinator in response to increased demand for these opportunities by OLLI members.
- OLLI's Assistant Director Kim Little was nominated for the Provost Award for Excellence in the Human Relations category for her work supporting OLLI members and team during the major staff transitions in the last year.

Challenges: Recommendations and Concerns for the Future:

- In the classroom, we observed a trend that needs to be remedied this year. To meet our revenue goals and to cultivate an exciting classroom environment, most courses and lectures need to achieve a fill rate of 75% or higher. In 2022-23, 38% of OLLI's courses and lectures had a fill rate below 75%. Half of those courses and lectures had a fill rate below 45%. While it's impossible to know exactly what drove that trend, two potential contributing factors are actively being addressed. First, in 2022-23, OLLI's catalog that

was distributed to existing and prospective members only included course title, instructor, price, and date/time. Course titles without further support aren't adequate to get members' attention when we are competing for their time and dollars with other organizations and travel. In FY 2023-24, we are producing catalogs that include course descriptions to better fill our classes. Further, we recognize the importance of spending time crafting compelling titles. In Fall and Spring, we used course titles as submitted by instructors, rather than taking time to edit and make titles more compelling. For 2023-24, programming staff have been tasked with identifying problematic titles and bringing them back to either the full OLLI team or a subgroup of Program Committee members to brainstorm more compelling alternatives.

- As mentioned in the "Goals for 23-24" section, reinvigorating excitement about volunteerism organization-wide as a means to recruit new members will be essential.
- As mentioned in the "Goals for 23-24" section, successfully relaunching the Multi-day Study Trips arm of our program is essential. In envisioning the Special Programs Coordinator position after Joan Hardiman-Cobb's retirement and before Lindsey Hale's hire, this element of the program had been de-emphasized by OLLI's prior director; however, current director Eliza Kiser is bringing this back and has been working to realign team responsibilities so this is possible. We expect to produce two Multi-day Study Trips within the US in FY 2023-24. We are working to partner with NC State Alumni Association's WolfTreks program on an international trip in 2025. Planning for this will begin in fall 2023.

Technology Upgrades:

- For OLLI, first priority technology upgrades are related to member safety, inclusion and accessibility. With support from the Vice Provost's Office, OLLI obtained an AED and first aid kits to go on offsite trips. This life saving equipment, paired with staff training, significantly improves outcomes for OLLI members in the event of an offsite emergency. Further, we've adapted processes to ensure we are always prepared for an emergency by working with the Reporter Team to set up Reporter to collect emergency contacts for all members, and by sharing detailed itineraries with full office staff.
- We worked with the Reporter team to develop a means for processing group registrations, opening the door for a new potential revenue stream as OLLI is now able to engage with retirement communities by offering spaces in large room lectures to their participants who are not members. One lecture following this format was offered in Spring 2023; for Fall 2023, we are offering 5 and engaging with retirement communities about those offerings in July.
- With 25% of OLLI members registering for programs over the phone, the OLLI team improved the efficiency of processing registrations on the first registration day for each semester by borrowing an additional Bluefin device from the NCSCaLE Business office on those days.
- OLLI staff worked with the NCSCaLE Business Office to develop a process and secure necessary technology for processing registrations offsite in order to sell memberships while at community events.

The Center for Urban Affairs and Community Services (CUACS): *(supports University Goal 2: Ensure preeminence in research, scholarship, innovation and research; University Goal 3: Expand and advance our service to the citizens of the state and beyond - defining the standard for a 21st-century land-grant university; University Goal 4: Champion a culture of equity, diversity, inclusion, belonging and well-being in all we do; Division Goal 4: Continuing to develop and deliver high quality impactful academic outreach programs and technical assistance and research services to the individuals, organizations and communities of North Carolina; and Division Goal 5: Serving as a model for a best practice workplace that champions respect and professional growth, and fully embraces diversity, equity and inclusion):*

CUACS continued to emphasize longevity, continuity and its value to the citizens and state of North Carolina this fiscal year. Through its delivery of good work and its extensive experience, CUACS has been able to sustain long-term clients. Clients depend on CUACS and its experience to help them meet their state and federal mandates. As of June 1, 2023, CUACS generated a total of $9,444,952 in contract funding that supported its important initiatives.

CUACS began work with the North Carolina Department of Public Instruction (NC DPI) in 1982. This year the work continued in helping NC DPI advance online assessment and in the identification of learning resources for teachers through the Technical Outreach to Public Schools (TOPS) project. CUACS staff has doubled the number of assessments and resources over the past two years making North Carolina one of the top states in capacity for online assessment. North Carolina remains one of a handful of states that develop their own assessment and accountability program (over 143 individual assessments) including our in-house distributive scoring platform for NC DPI to use for constructed response assessments, which processes student responses for seven assessment areas (over 1.5 million student responses were scored this year). CUACS expanded its assessment work with 145 Career and Technical Education (CTE) courses this year.

The NC Treatment Outcomes and Program Performance System (NC-TOPPS) project is a part of the North Carolina Department of Health and Human Services (NC DHHS). CUACS has had a continuous project with this department since 1984. Over the past year, CUACS expanded its capacity to track and report how various treatments are performing, based on patient outcome and cost. CUACS significantly expanded the types of treatments/services allowing for quick program review at the state and local levels to allow for easier realignment of services as well as providing assistance to guide policy decisions. The system collects information for all consumers with specified substance abuse and mental health service needs. NC-TOPPS continued to serve as a mechanism for consumer functional outcomes data. In addition to its ongoing customer service activities, deliverables included: continued development and upgrade of a User Profile Management System, development of a secure mental health/substance abuse Data Retrieval/Query system for users, upgrade of the NC-TOPPS Outcomes at a Glance Dashboard, maintenance of the user interface and maintenance of a database resulting from LME-MCO mergers, and routine maintenance of all NC-TOPPS online tools and IT products. CUACS has worked with NC DHHS since 1986.

CUACS is proud of another long-term partnership with the NC DHHS, Division of Child Care. CUACS has conducted the NC Child Care Market Rate Survey since 2001 for this Division. The purpose of this census is to collect data on the rates charged for child care in order to develop reimbursement rates for child care providers that offer subsidized child care. By establishing up-to-date, valid market rates for child care, the North Carolina Department of Health and Human Services and DCDEE can ensure that the reimbursement rates are fair to providers of

subsidized child care and that subsidized child care services are both affordable and accessible for families. Based on the success and reputation of this work with NC DHHS, Child Care Division, this year we were invited to conduct the SC Child Care Market Rate Survey. We were recommended by the U.S. Department of Health and Human Services.

All staff at CUACS participated in University provided staff development training and education courses in the areas of diversity, equity, and inclusion. Further, we are diligent about striving for a diverse workforce. Our current staff is 76% white, 7% Asian, 1% Latino, and 16% Black.

CUACS' Goals for FY 2023-2024 include:

- CUACS' focus in FY 2023-24 includes continuing to positively serve the citizens of North Carolina through its important and continuing contract and grant efforts as described above, as well as efforts to secure new projects that make a positive difference to individuals, organizations and communities.

Staff: Major new appointments, kudos, professional activities and recognition:

- John Armour, Austin Ambrose, Eric Borsody, Michael Emberson, Maria Mauriello, and Demetrius Harrison (CUACS) were promoted within their various positions this year.
- (CUACS) hired six new employees: Rachel Bramble, Claire Reed, JaeNicholas McDonald, Tina Woodley, Dipa Sharma Gautam, and Sam Dicken.

Challenges: Recommendations and Concerns for the Future:

- CUACS must continue to maintain IT services at the high level making sure the equipment, software and other peripherals are updated frequently to ensure delivery of client and contractual requirements.

- CUACS will increase efforts to market services this coming year as prospective clients are returning and reconnecting with CUACS for delayed services during the pandemic.

Marketing Services: *(supports University Goal 1: Empower students for a lifetime of success and impact; University Goal 2: Ensure preeminence in research, scholarship, innovation and collaboration; University Goal 4: Champion a culture of equity, diversity, inclusion, belonging and well-being in all we do; University Goal 5: Improve university effectiveness through transformative technologies, cutting-edge processes and actionable data; University Goal 6: Lead in developing innovative partnerships, entrepreneurial thinking and applied problem-solving; Division Goal 1: Striving and attaining organizational excellence throughout our entire division; Division Goal 3: Becoming world-class in strategic program development that includes strategic market research and data-driven decision-making; and Division Goal 5: Serving as a model for a best practice workplace that champions respect and professional growth, and fully embraces diversity, equity and inclusion):*

- McKimmon's Marketing Services team merged with the DELTA MarComm team on February 6, 2023.

- Overall NCSCaLE digital campaign statistics:
  - Facebook
    - Campaigns: 27
    - Reach: 3,909,110
    - Impressions: 12,235,131
    - Boosted Posts: 35
  - Linkedin
    - Campaigns: 13
    - Impressions: 1,303,348
    - Clicks: 9,832
    - Avg CPC: $1.98
  - Google Ads
    - Campaigns: 27
    - Impressions: 1,663,983
    - Clicks: 39,061
    - Avg. CPS $1.00
    - Phone calls generated: 129
- In 2022-23 we launched marketing campaigns for the new Project Management program, using paid digital campaigns, email marketing and an overall content refresh. In the Spring of 2023, we began our planning for the new Design Thinking program in partnership with NC State's College of Design. Expected launch date is July 1.
- In 2022-23 we engaged in sponsorship opportunities with both the Raleigh and Cary Chambers of Commerce. These sponsorships included paid digital advertising in their newsletters and on their websites, and event sponsorships.
- The team began the transition from ListPilot (our current email/database tool) to MailChimp (a marketing automation tool). New email campaigns were done out of MailChimp, as work began to transfer data into the new system.
- The number of emails sent by the MarComm team increased by 10% from the prior fiscal year from 101 to 112, which includes the monthly general newsletter and our engineering newsletter.

Update on Marketing Services Goals for FY 2022-2023:
- Continue enhancements to the NCSCaLE website to improve user-friendliness of the web pages and enhance functionality.

- o Status: Marcomm team is currently working with OIT partners to move the outdated conference website servers to a more efficient solution.
- Continue to reduce and eliminate use of printed materials, including onsite program books.
  - o Status: Marcomm is continuing to cut down on the use of print materials. We no longer print program brochures. We did a small print piece for on-site Raleigh Chamber sponsorship events and limited postcards for NCSCaLE owned programs. Our largest print requests are for conference program books.
- Implement marketing automation tools and lead nurturing email campaigns to increase registrations in NCSCaLE programs, conferences and events.
  - o Status: We are currently transitioning from ListPilot to Mailchimp. We are targeting August 2023 as the date to be out of ListPilot. We continue to investigate Salesforce and plan to transition to this platform along with the rest of NCSCaLE in FY25.
- Incorporate additional efficiency tools to aid in our marketing processes.
  - o Status: In 2022-23 we implemented a marketing request form, ClickUp project management tool and a program kickoff process to help streamline our projects and provide consistency from project to project.
- Continue extensive use of digital marketing, including social media posts, video testimonials, and editorial content.
  - o Status: In 2022-23 our primary focus was on digital and email marketing. We have worked to grow our video content. Two high performing videos on our channels were for the Sport Fishing and Insect Rearing programs. We also worked to grow our new content for the LCOP and PM programs, conducting interviews with program alumni to gain valuable student insight, quotes and success stories for our campaigns.
- Implement Google Analytics into all online marketing efforts and utilize the data to guide future marketing decisions.
  - o Status: This is still a work in progress due to the current situation of the website. The Google Analytics are not correctly set up and the only section of the website that provides relevant and reliable analytics is the LCOP landing page. Extensive work is needed to correct the issues with Google Analytics.
- Reduce creation of brochure pdf's by creating more informative program and course web pages and drive traffic to those pages.
  - o Status: Unfortunately, we do still use brochures on many of our program pages. The program pages that currently exist for NCSCaLE do now allow for us to move away from PDFs at this time as much of the content in the brochures needs to live on the website but the program pages are not currently built to allow custom content.
- Develop internal and external announcement campaigns to announce division name change.
  - o Status: We are currently working with University Communications to create the NCSCaLE brand and branded materials.

MarComm Goals for FY 2023-2024 include:
- Web
  - o Continue enhancements to the NCSCaLE website to improve user-friendliness of the web pages and enhance functionality.
  - o Build new program pages and campaign landing pages for priority programs.
- Email Marketing

- o Complete the transition from ListPilot to Mailchimp.
  - o Design new email blast and newsletter templates to meet brand standards.
- ● Digital and Content Marketing
  - o Grow social media footprint through engaging content including motion graphics and video.
  - o Refine digital ads, evaluate keywords and creative.
- ● Print
  - o Continue to reduce and eliminate use of printed materials, including onsite program books.
  - o Encourage conference clients to transition to conference apps and digital options.
  - o Evaluate the need for print mailing for OPD "owned programs (Tax Schools, MRM Summit, etc) and implement a method to evaluate the ROI of any print mailing projects.
  - o Eliminate the use of digital brochures by creating user friendly program and landing pages.
- ● Marketing Automation
  - o Continue to explore marketing automation options such as Salesforce
  - o Marcomm team will partner with others on campus to determine possible cost-effective solutions.
- ● Efficiency
  - o Incorporate additional efficiency tools to aid in our marketing processes.
  - o Establish internal Marcomm processes.
- ● Reporting
  - o Upgrade to GA4 across all web properties
  - o Fix outdated goal tracking on web properties to ensure relevant goals are being tracked.
- ● NC State Continuing and Lifelong Education 100th Anniversary
  - o Collaborate with stakeholders to celebrate and promote the 100th Anniversary to internal and external audiences.
- ● Establish the NCSCaLE brand.
  - o Develop brand assets and guidelines for NCSCaLE.
  - o Launch internal and external announcement campaigns to formally announce NC State Continuing and Lifelong Education to the NC State community.

Staff: Major new appointments, kudos, professional activities and recognition

- ● Associate Director Janice Sitzes accepted another position at NC State in December 2022 and the DELTA MarComm team stepped in to assist.
- ● On February 6, 2023, NCSCaLE Marketing Services merged with the DELTA MarComm team. Through this merger, several members of the DELTA team dedicated part of their work effort to NCSCaLE, increasing the capabilities, skills and expertise for NCSCaLE. The staff and the percentage of effort dedicated to NCSCaLE are:
  - ○ Kathy Harper, Assistant Vice Provost for Marketing, Communications and Partnership Development - 30% effort
  - ○ Katie Bean, Director, Marketing - 50% effort
  - ○ Bren Veinrich-Felling, Lead Multimedia Designer - 30% effort
  - ○ Cassidy Colson, Digital Marketing Content Specialist - 20% effort
- ● Some other staffing changes of note:

- ○ Jeff Barnes, Marketing Associate, splits his effort 50/50 between NCSCaLE and DELTA
- ○ Marketing Specialist Jenny Barnett joined the team in May 2023, our first 100% NCSCaLE new team member under the merger
- ○ Two temp positions, a full-time writer and part-time multimedia designer, were also hired
- ○ Visual Arts Specialist position was eliminated

Challenges: Recommendations and Concerns for the Future:

- ● Growing pains. There has been a lot of change - new staff, new processes, new tools, new partnership and new services in the NCSCaLE MarComm department. The MarComm team is striving to maintain a steady level of service, implement new tools/services and fix some broken and inefficient tools and processes behind the scenes. There is a heavy workload, a little bit of chaos with so many new things (people, processes, tools) and stress as the team wants to meet and exceed expectations. Communication, teamwork, patience and flexibility will be key to successfully navigate these challenges.

Finance and Administration: *(supports University Goal 5: Drive institutional effectiveness through transformative technologies, cutting-edge processes and actionable data; Division Goal 1: Striving and attaining organizational excellence throughout our entire division; and Division Goal 2: Implementing business practices that are aligned with expected best practices at NC State University):*

The Office of Finance and Administration (OFA) progress on FY2022-2023 goals are summarized below:

- ● **Business Continuity**
  - o Maintain adequate staffing to ensure excellent support for our faculty and students to provide recommendations to fund Instructional and Interdisciplinary Units' strategic plan (DELTA, NC State Continuing & Lifelong Education, NC Entrepreneurship, Wolfpack Investor Network, and REPORTER) new positions during the annual strategic plan refresh and the 2022-2023 budget planning process. This includes financial and business-associated positions at DELTA, NCSCaLE, REPORTER, NC ENT and WIN.
    - ▪ **Progress:** We continue to oversee and manage a budget composed of state funds, auxiliary sales & services, endowments, foundations, gifts, and student fee receipts for DELTA, NCSCaLE, Wolfpack Investor Network (WIN), NC State I&E, and REPORTER. We assisted both divisions with personnel, financial and efficiency challenges. We developed Business Services Shared Services strategies to include "Total Human Resources Services" with the foundational plan approved February 2022 and implementation June 1, 2022. We are well on our way with modernizing processes for both divisions, refreshing procedures, digitizing personnel records (OnBase), onboarding and developing a concierge service, wellness, an employee guide, fine tuning recruitment, creating employee journey maps and piloting our DELTA employee mentoring program. We also completed our plan for NCSCaLE business

services and received Vice Provost approval; restructured positions, and have one remaining vacant position to fill to fully execute this plan. We will review shared functions between DELTA and NCSCaLE after the final vacancy is filled (Finance & Budget Analyst II) in FY24 and provide recommendations for senior leadership review. We are taking this slow, ensuring that different functions rise up to lend themselves to the concept of shared services versus dictating what it should look like. With the turnover in the NCSCaLE business office, we are still working on process reviews and should be done by August 2023. Other contributions include completion of phase 1 of the NCSCaLE Sales Forecast, Event/Program Budgeting (350~); prepared the MarComm Shared Services Proposal Review and Cost Analysis and presented analysis to senior leadership; from this work we were able to obtain approval to move forward with a memorandum of agreement between the two divisions; and monitored resources for NC State I&E and provided active mentorship and consultation. The Wolfpack Investor Network (WIN) was reorganized under the Office of Research & Innovation October 1, 2022 and NC State I&E will be reorganized under the Office of Interdisciplinary Programs July 1, 2023.

o   Review, submit and plan resources to support NCSCaLE Salary Analysis by March 2023 (DELTA Salary Analysis completed May 2022; awaiting UHR review and approval). **Progress:**
   ▪   Completed FY23 upon execution of LSI and LMAR adjustments
   ▪   Will work with a more targeted study for NCSCaLE per discussion with the Vice Provost - FY24 goal

o   Streamline Onboarding/Offboarding across divisions. **Progress:**
   ▪   We are currently updating our onboarding and recruitment processes to build in workflows and tracking, allowing for greater transparency between the HR Team, internal stakeholders and the hiring managers, moving away from separate documents, to an all in one area to streamline requests. Along with this, the HR Team plans to build in more resources for supervisors, to encourage belonging for new employees, such as icebreakers and general tips for more dynamic one on ones.
   ▪   The HR team is focused on creating an HR webpage as an extension of the main website. This will be an enhancement for employees, empowering them to find answers and seek out resources on their own, if they choose. Providing employees with the necessary tools related to leave, benefits, performance, and wellness will benefit not only new employees, but all employees across classifications.

o   Transition NCSCaLE to Asset Panda, automated inventory and home use authorization with workflow. Progress:
   ▪   NCSCaLE needed a solution to manage its many assets in various locations. We also had multiple inventories (Capital Asset Management System, conference room AV and equipment, office and conference room, and Computers, laptops and tables. Additionally, our peripherals were not being tracked. We established a lifecycle process for computers, laptops and tables and institutionalized the process in our annual budget cycle. We needed to consolidate all these inventories, refresh the

inventories, track lifecycle and also home use of our assets. Finally, the solution needed to include replacement costs to ensure our building and contents insurance is accurate.

- o We began our journey with a demo of Asset Panda Demo in the spring of 2022. In the Summer/fall of 2022 we:
    - ▪ Completed full asset physical inventory
    - ▪ Scrubbed legacy inventory and information
    - ▪ Set replacement costs and useful life parameters
    - ▪ Refined insurance submission for building and contents
- o In the fall of 2022 we accomplished the following:
    - ▪ Purchased Asset Panda
    - ▪ Defined and *Redefined* processes
    - ▪ Established Asset Field Description, Asset Status Definitions, Categories, Department & Unit, Condition, Campus, and Mandatory fields
    - ▪ Confirmed Fields and Tables (Asset, Employee, Location, etc.)
    - ▪ Established periodic Audits & created Reports
    - ▪ Import data to system
    - ▪ Established Permissions and Roles
- o In December of 2022 we deployed our solution:
    - ▪ 1300+ assets (electronics, furniture, & classroom equipment) uploaded into NCSCaLE's instance of Asset Panda
    - ▪ Accesses and Permissions implemented
    - ▪ Two (2) vendor-led training sessions
    - ▪ Barcode stickers created and applied to assets
- o The winter and spring of 2023 we updated our financial information, archives, workflows and conducted additional inventory cleanup and communicated to the Asset Holders that we were going to launch our Annual Home Use Authorization through Asset Panda and completed our first authorization through this application in February 2023
- o In the summer of 2023 will demo our solution to the University Equipment Checkout Working Group

- o Continue working on building a Healthy Team, incorporating all business offices staff to form a more cohesive and inclusive team. **Progress:**
    - ▪ We did not hold a retreat this spring but will this fall, with only one position vacant. We are hopeful we will fill the position in time for the retreat. This year's retreat will include the entire DELTA/NCSCaLE team.
    - ▪ Due to not having the entire team on board as of the end of this reporting period and also implementation of the new Check-Receipting Process April 3, 2023, we decided to wait until the Fall 2023 to conduct the survey. Our goal is to have a Business Office Customer Service survey ready to present to the Senior Management Team for approval and launch prior to our DELTA/NCSCaLE Business Office Retreat, September 2023. Data from the survey will be part of our retreat.
    - ▪ We will also send a survey to both divisions' leadership teams to ascertain their requirements and what operations can do to support them in achieving their goals.
    - ▪ The results of both surveys and discussions during the retreat will give us the necessary information to formulate our team plan and establish our FY25 individual performance plans goals.

- **Financial Planning, Analysis & Challenges.** Continue to oversee and manage a budget composed of general funds (appropriations and appropriated receipts) auxiliary, sales & services, endowments, foundations, gifts, and student fee receipts for DELTA, NCSCaLE, ENT, WIN, and REPORTER. Assist units with financial and efficiency challenges:
- Develop Business Services Shared Services strategies
  - Total Human Resources Services - foundation approved February 2022; implementation June 1, 2022; complete implementation by January 1, 2023. **Progress:**
■ During FY 22-23, NCSCaLE had 43 new hires, 3 promotions, 21 rehires, 5 retirements, 1 transfer and 44 separations.
  - Hires:
    - Perm - 17
    - Student Temp - 2
    - Professional Temp - 21
    - No Pays -3
  - Promotions
    - Program Assistant to Program Coordinator - 1
    - Project Manager to Asst Director - 1
    - IT - 1
  - Rehires
    - Perm Employee - 1
    - Temps - 17
    - No Pay - 1
    - Retiree - 2
  - Retirements - 5
  - Transfers - 1
  - Separations
    - EHRA - 1
    - SHRA - 4
    - No Pay - 7
    - Student Temp - 1
    - Professional Temp - 31
    - Unpaid Non-Faculty - 2 (Alice Warren and John Cudd)
  - Our time to fill increased from 44.31 days pre pandemic to 71 days post pandemic. Our average time to fill vacant positions since calendar year 2019 is 51.16 and we are moving in a positive direction. We attribute this increase to several reasons: 1) the pandemic had an impact on our pool of applicants, most requiring remote work and our division is a forward facing enterprise plus several positions that were particularly difficult to fill: Accountants and CPE Project Manager; 2) turnover coupled with furloughs increased our vacancy rate and reduced resources and revenue streams delayed many searches; and 3) the number of personnel actions incurred as we rebuilt our staffing coming out of the pandemic created high volume for our team to manage.

■ In spite of the challenging labor market for certain positions, NCSCaLE continues to use the resources available and continually remains creative with the use of current staff and temporary employees. Our services are continually requested and in order to continue the high level of service to our clients as well as expand our services to meet demand, we must ensure that we are continually mindful of how we are using current talent, in order to accurately identify any gaps or potential work stoppages. NCSCaLE evaluates

vacant positions as they arise, analyzing the need for the refill, or reclassifying the position based on organizational need. In certain situations, abolishing a position may be necessary.

- ■ New Positions:
  - ● The partnership between DELTA Marketing and Communications and NCSCaLE has also revealed the need for additional support in this area, thus creating a new position to ensure its success.
  - ● OPD's return to full staffing, hired three program assistants this fiscal year.

Position	Description
00109914	Administrative Support Spec, Program Assistant, OPD, $42,435
00109871	Administrative Support Spec, Program Assistant, OPD, $42,435
00110132	University Program Manager, Project Manager, VP, $75,000 (All Funds Budget)
00109940	University Program Specialist, Marketing Specialist, MarComm, $60,000
00109460	Administrative Support Spec, Program Assistant, OPD, $42,435

- ● **Permanent Employee Demographics:**
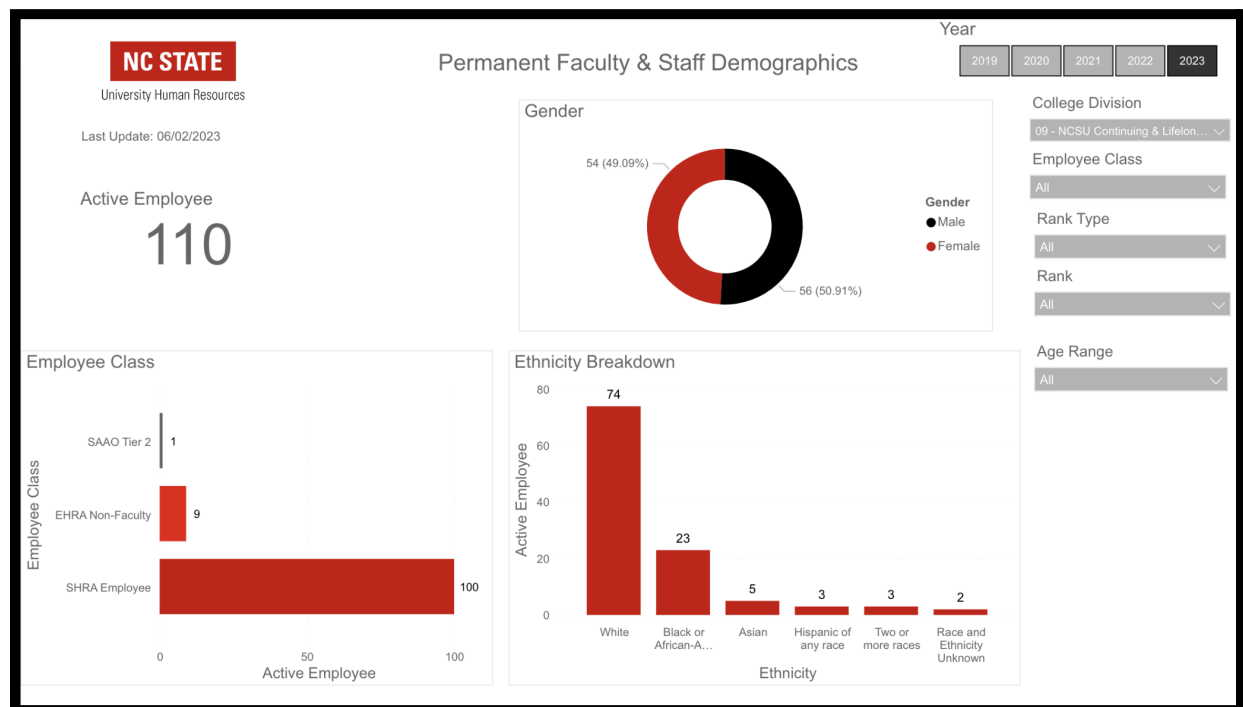
NCSCaLE is slightly above (20.91%) Wake County's Black or African American (20.80%) but is lower than Wake County's Asian (8.90%) [NCSCaLE 4.55%] and Hispanic of any race (10.60%) [NCSCaLE 2.73%]. Reference US Census data as of July 1, 2022. For the most it appears that the division's staff demographics reflect that of Wake County.
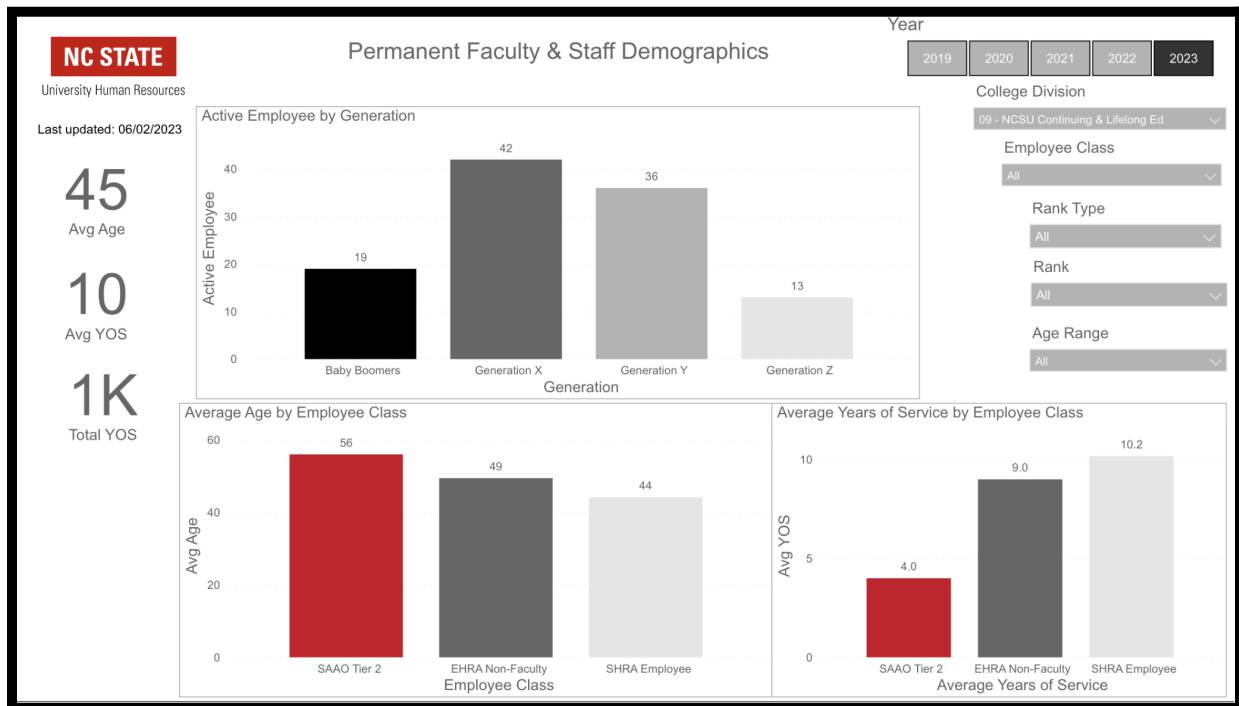
1. Baby Boomers: There are 19 employees from the baby boomer generation. Baby boomers are typically individuals born between 1946 and 1964. They are known for their work ethic, experience, and loyalty to organizations.
2. Generation X: There are 42 employees from generation X. Generation X refers to individuals born between 1965 and 1980. They are often characterized as independent, adaptable, and technologically competent.
3. Generation Y (Millennials): There are 36 employees from generation Y or millennials. Generation Y includes individuals born between 1981 and 1996. Millennials are known for their digital proficiency, desire for work-life balance, and collaborative nature.
4. Generation Z: There are 13 employees from generation Z. Generation Z comprises individuals born between 1997 and 2012. They are often described as tech-savvy, entrepreneurial, and socially conscious.

It's important to note that the age ranges and characteristics mentioned above are generalizations and may not apply to every individual within each generation. Demographic trends and characteristics can vary across different regions and organizations.

This demographic information can be helpful for organizations in understanding the age distribution within their workforce and tailoring strategies, communication styles, and benefits to meet the needs and preferences of different generations. This information has been shared with our HR Team to include in their annual plans.
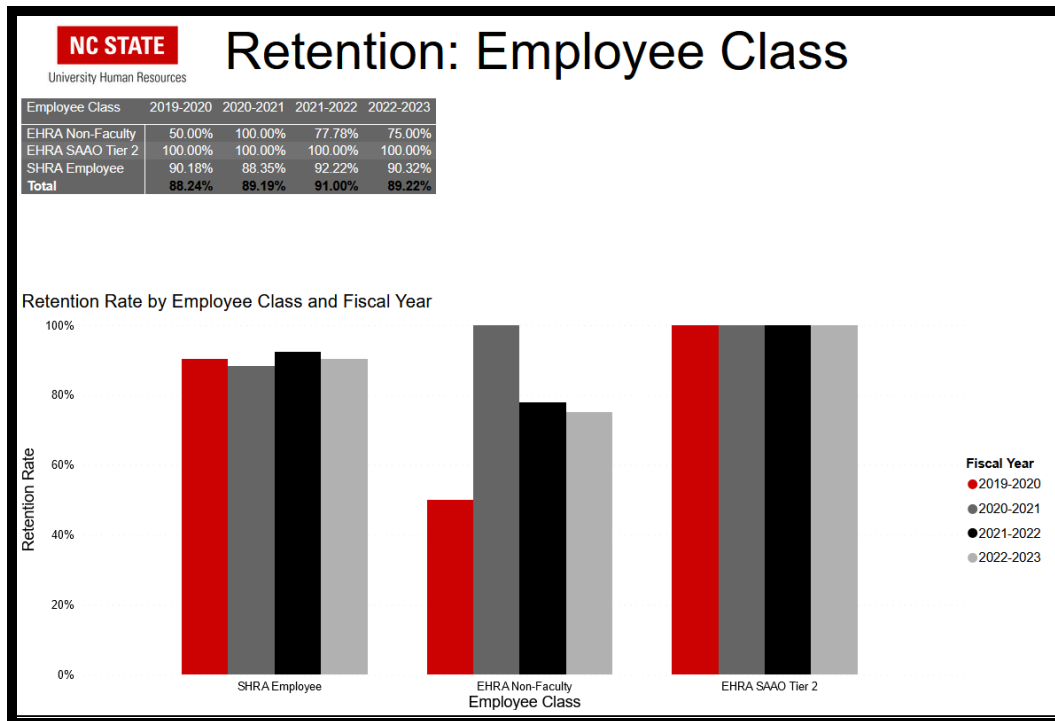
● **Turnover and Retention Rates:**
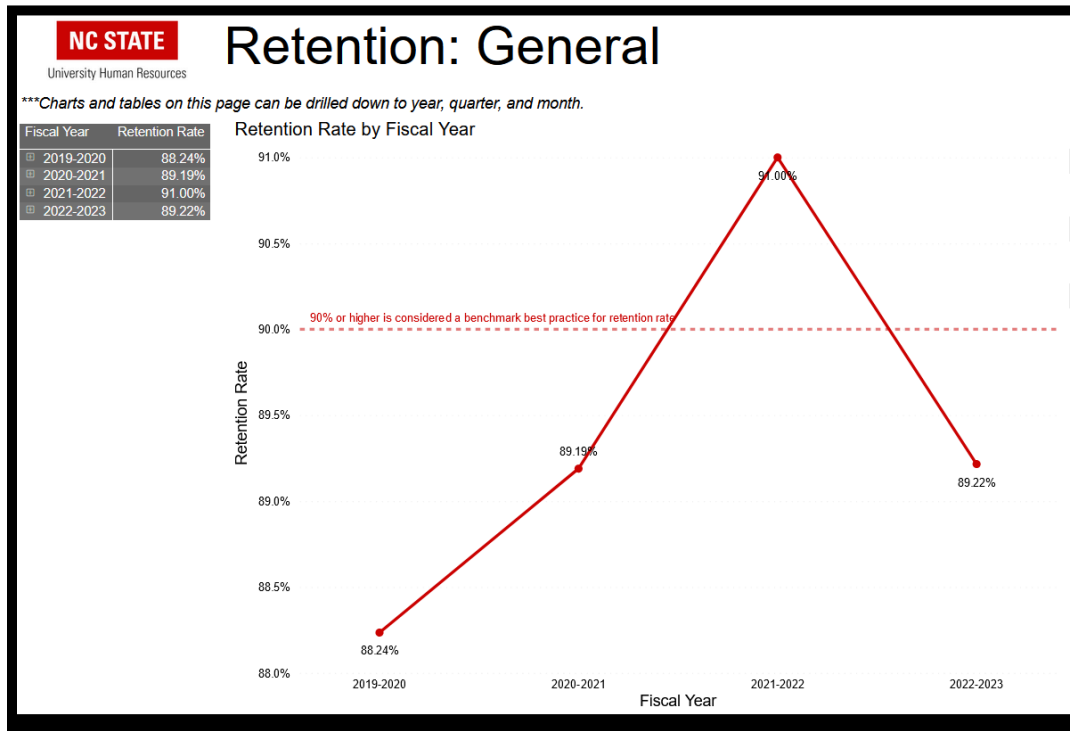
The above graph clearly shows the progress we have made towards retention with 90% or higher being the University's benchmark. We've dropped slightly (down to 89.22%) due to several retirements (Tricia Inlow-Hatcher, Andy Billingsley, Kelly Hinkle, Kyle Wallace and Elizabeth Hubbe).

Retention Rate:

Generation

Generation	2019-2020	2020-2021	2021-2022	2022-2023
Baby Boomers	84.21%	87.10%	92.31%	77.27%
Generation X	92.16%	90.20%	91.11%	93.02%
Generation Y	86.21%	92.86%	88.89%	96.55%
Generation Z	100.00%	0.00%	100.00%	75.00%
Total	88.24%	89.19%	91.00%	89.22%

Age

Age Range	2019-2020	2020-2021	2021-2022	2022-2023
20 - 29	80.00%	87.50%	100.00%	84.62%
30 - 39	90.00%	90.48%	85.71%	95.24%
40 - 49	92.68%	91.89%	89.29%	95.83%
50 - 59	92.86%	88.89%	96.00%	92.59%
60 and Over	75.00%	83.33%	89.47%	70.59%
Total	88.24%	89.19%	91.00%	89.22%

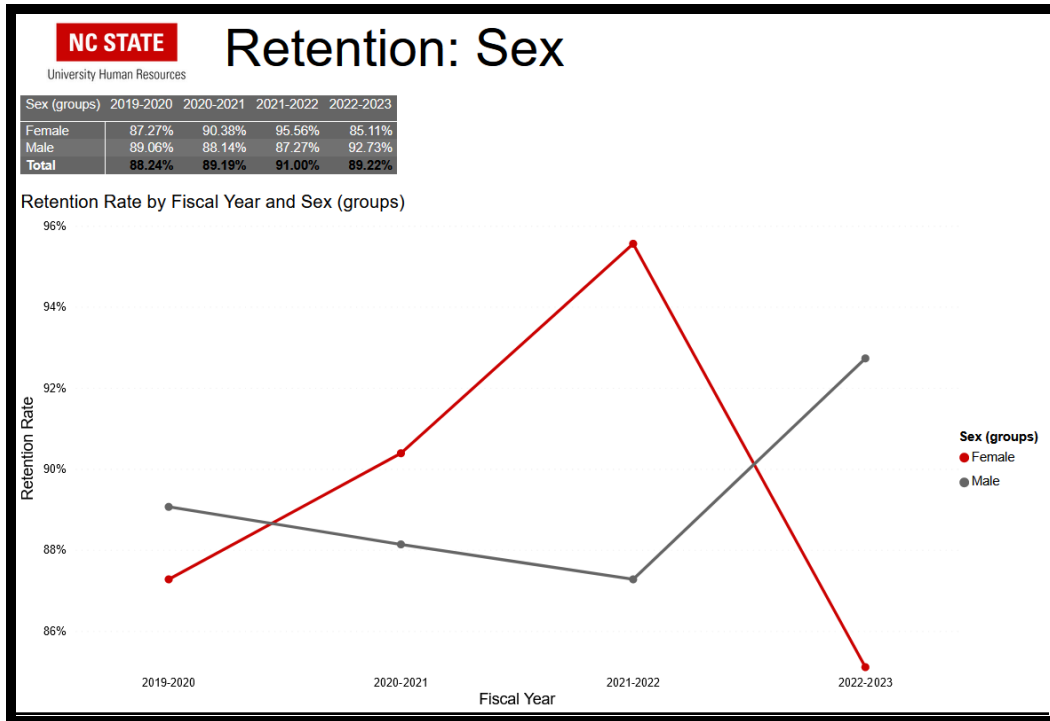Based on the provided generation retention rate data:

1. Baby Boomers: A lower retention rate for baby boomers may be influenced by factors such as retirement (noted in the previous chart) or transitioning to other opportunities.
2. Generation X: Generation X shows a relatively higher retention rate, suggesting that they have demonstrated loyalty and commitment to the organization.
3. Generation Y (Millennials): Generation Y shows a high retention rate, indicating that they tend to stay with the organization for a longer duration.
4. Generation Z: Generation Z shows a lower retention rate compared to generation X and Y, suggesting that they may have a higher propensity to switch jobs or explore new opportunities. Additionally, they are most likely to be assigned to entry level positions so switching jobs or exploring new opportunities is not uncommon.

It's important to consider various factors that could influence retention rates, such as career development opportunities, work-life balance, company culture, compensation, and generational preferences. The division is investing in a wellness room, breakroom and the various employee recognition and celebration programs which will have a positive impact on retention for all generations. Plus the university and division have implemented flexible work arrangements which also enhances retention.

NC STATE University Human Resources

Retention: Employee Class

Employee Class	2019-2020	2020-2021	2021-2022	2022-2023
EHRA Non-Faculty	50.00%	100.00%	77.78%	75.00%
EHRA SAAO Tier 2	100.00%	100.00%	100.00%	100.00%
SHRA Employee	90.18%	88.35%	92.22%	90.32%
Total	**88.24%**	**89.19%**	**91.00%**	**89.22%**

Retention Rate by Employee Class and Fiscal Year

EHRA Non Faculty's retention rate is less but we have very few EHRA Non Faculty employees in our division. The majority of our separations have been SHRA employees.

- Separations
  - EHRA - 1 (James Miller)
  - SHRA - 4 (Felicia Atkinson, Clancy Cummings, Demarshay DeVane, Andrew Rattanavong)
- Retirements
  - EHRA - 1
  - SHRA - 4
- Transfer
  - EHRA - 1

Retention: Sex

Sex (groups)	2019-2020	2020-2021	2021-2022	2022-2023
Female	87.27%	90.38%	95.56%	85.11%
Male	89.06%	88.14%	87.27%	92.73%
Total	88.24%	89.19%	91.00%	89.22%

The majority of our separations have been female employees (4 of the 5 retirees and 2 of the 5 separations)
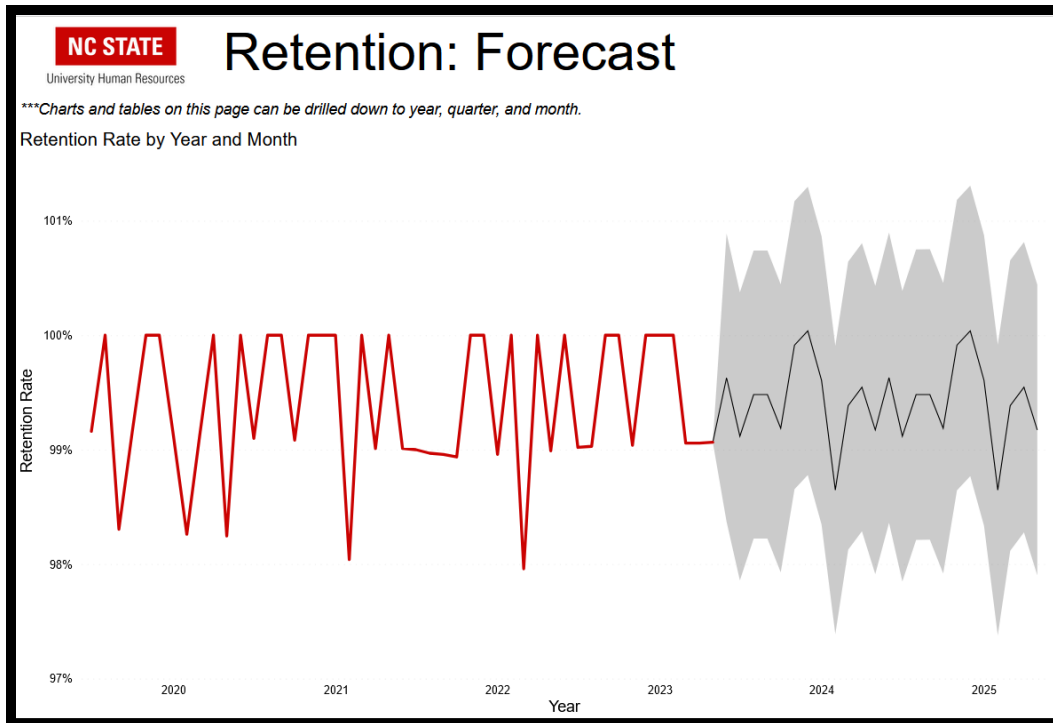
The retention forecast is providing a smoothing average and the worst and best case values. We are hopeful that with our new and refreshed programming, expansion in continuing education and conferences markets, we will be able to provide a more stable environment for our employees which should lead to enhanced retention. Additionally with the aforementioned wellness and recognition programs offered we will be able to provide a more balanced workplace environment, again contributing to enhanced retention of all of our employees regardless of employee class and demographics.

- NCSCaLE Wellness:
  - ***NCSCaLE certified GOLD for the 2023 Well Wolfpack Workplace*** certification period. The University Wellness team hosted the first annual wellness banquet on April 17, 2023, where we were awarded with the certificate.
  - Wellness Champions are encouraged within NCSCaLE. Wellness Champions encourage their colleagues to participate in initiatives and provide support. We can't do this alone!
  - The wellness board on the 2nd floor of MCTC is a way for employees to view happenings for the month and stay connected outside of email and other technology. The wellness board will feature organizational wellness activities, campus initiatives, and resources that encompass the elements of wellness - Career, Social, Financial, Physical and Community.
  - In addition to our wellness initiatives, we make it a priority to share university wellness workshops, OSHR lunch and learns, and other resources.
  - The HR team meets twice monthly to brainstorm, plan and curate content around health and culture to share with staff. We thoughtfully curate the topics based on current events and feedback from staff. Throughout the month, we will hold lunch and learns or workshops, both in person and

remote, to highlight the current month's theme, or to provide additional support where we believe staff may need it.

- ○ The HR team values employee feedback. We need this feedback to provide valuable content and offerings for our stakeholders. An all staff survey will be sent next fiscal year to be sure we are still providing the resources staff what to see, and using the communication channels that suit the needs of the individual. We will continue to do this annually and share the feedback and actionable steps that the HR team is pursuing in light of the feedback.
- ○ DELTA and NCSCaLE partnered in certain offerings for staff, such as hosting a Smart Snacking and Moving lunch and learn in April 2023, or bringing in our onboarding partners to help us host a Cinco de Mayo Kahoot game, as well as NC State Trivia, on May 5, 2023. We also showcased three different members from the Osher Lifelong Learning Institute (OLLI) in a video prepared for Older Americans Month.
  - ■ To encourage employee wellbeing, NCSCaLE operates within the scope of the University's flexible work policy. NCSCaLE strives to allow flexibility wherever possible. Flexible work schedules look different for each department, unit and team. Empowering managers to determine the best use of this policy allows for cohesion and protects business continuity. We realize that employees are more than their work, and providing a holistic approach to how we work, will increase productivity and lower retention.
- DEIB Initiatives and Lead by Example
  - ○ Practice inclusion and belonging by supporting staff through changes, i.e. reorganization and divisional changes, collaboration with NCSCaLE. Progress:
    - ■ Even though formal DEI training is no longer required for staff, we encourage conversations and training around this topic, especially if there are staff who do not have a position where DEI is directly part of their duties. NCSCaLE still continues to partner with OIED and UHR regarding current and future training and initiatives that may appeal to our employees and represent our culture.
    - ■ Staff who serve on a search committee will be requested to take search committee training each year. Frequent participants of search committees are highly encouraged to take an in person component of the training, in order to remain current on new practices.
    - ■ As part of Diversity Month held in April, we recognized Judy Heumann. We shared her brief story, as well as a video to ease the stigma of those with disabilities. DELTA held a Lunch and Learn with Dr. David Elrod, OIED Associate Vice Provost, geared towards understanding those with disabilities.
    - ■ In the month of March, we shared the story behind Women's History Month and provided ways we can celebrate.
    - ■ In May, we celebrated Older Americans Month by opening up conversations about the wisdom that our elders afforded us. We also shared a video with members from OLLI, where we asked each of them three questions about life.
- June is Caribbean-American heritage month, so we provide staff with ideas on

how we can experience this culture, with food, music, movies and experiences.

- As part of the feedback from the NCSCaLE all staff retreat held February 14 2023, the HR Team solicited volunteers to create an activities committee, dedicated to enhancing inclusion and belonging with the division. As part of this initiative, we encourage new members to participate in wellness champion training, producing activities that are in line with the <u>university wellness strategic plan</u>.
  - Develop plan for account administration, budget, and other business services for senior leadership review by December 2022
    - Provide recommendations for senior leadership review
    - Organize and reduce hard copy filing per University Disposition Schedule. Create a "paperless" filing process. This includes accounts receivable and collections files currently housed in the business office suite along with daily paperwork, catering fees, deposits, IDTs, etc.
- Going through all on hand files and shred based on the University Disposition Schedule
- Planning a process of going "paperless" for Business Office Financial records by December 31, 2022
- **Progress:**
  - Documents were shredded on-site via a third-party vendor, approved by University according to UDS and filing cabinets were surplused.
  - A "paper conscious" process has been implemented for journal entries completed, understanding that all documents can be scanned and uploaded to the PeopleSoft Financial System.
  - We completed 99% of our paperless effort as we are next going to look into the on-site Archive room, identifying any documents belonging to the business office. We hope to accomplish this task by December 15 , 2023.
  - We are well on our way with modernizing processes for both divisions, refreshing procedures and digitizing personnel records (OnBase). This is a joint project for the HR Team.

- Update NCSCaLE AR Process/Customer Service. To provide excellent support to the NCSCaLE units with Accounts Receivables. Strengthen relationship between the Business office and NCSCaLE units.
  - Conduct customer service surveys for the NCSCaLE units to find out what their needs are, what is working, what is not working, and future needs.
  - Assess if Notary Public Services are needed.
  - Provide a report to the Vice Provost of survey results and action plans based on survey feedback
  - **Progress:**
    - OLLI and OPD Sponsorship documentation process implemented December 2022. Outlined procedures with University Advancement on program sponsorships.
    - Customer Service Survey. Due to change in procedures and vacant accounting positions, a survey at this time would not provide helpful feedback. We will launch the survey in August 2023
    - The drop-box in the Business Office door has been successful in providing a secure way to receive incoming mail from the Print Services Office, credit card payment information during off-hours and when staff is not available and for the dropping-off of mail
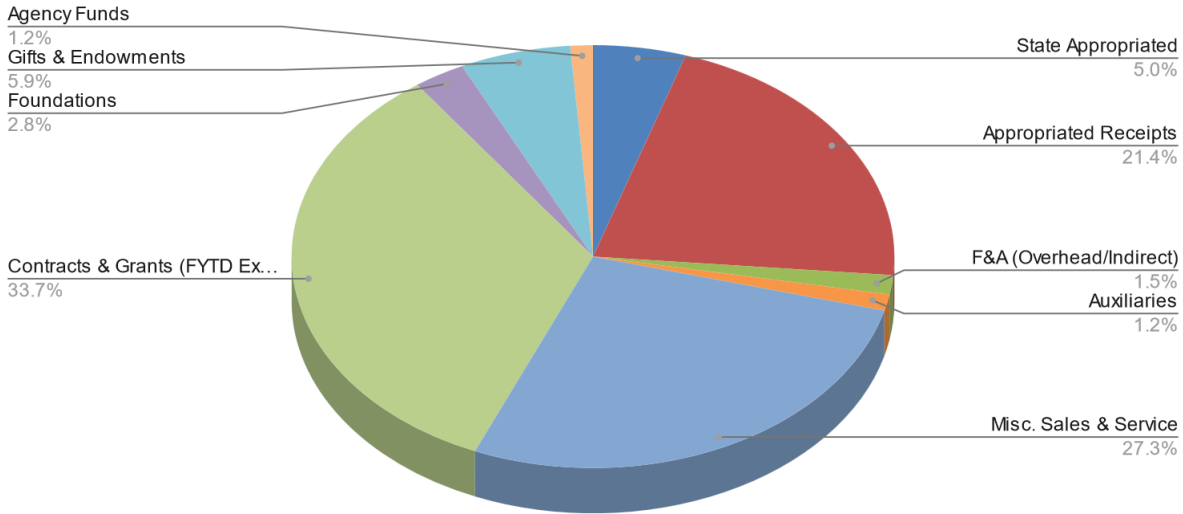
received inadvertently by other units.
- Created the Check Processing Flow Hub in accordance with guidance from University Internal Audit, ensuring compliance and separation of duties.
- Accounts Receivable: Significantly reduced the AR for McKimmon center departments though cash management policies and procedures. Reference our FY 2023 Third Quarter AR Report, our total outstanding AR **decreased 54%** since the second quarter and as of 3rd quarter, **71% of all AR is categorized as current**. Most of the division's accounts receivable does not exceed 60 days but we do have a case that has been referred to the Attorney General's office.
  - DELTA, NC ENT, WIN, REPORTER, and NCSCaLE
- Realign resources to assist Units with transformational goals to meet new challenges, post-pandemic. **Progress:**
  - NCSCaLE Reserves Requests. Successfully funded or received funding for $97,550 in reserves requests. Funding supported:
    - Panel Chairs
    - Stanchions Cart
    - Walkie Talkies
    - Fountain Pump
    - OPD Reception Area Painting
    - OLLI emergency supplies and portable AED, professional photography for use in marketing materials, portable cooler and folding table for Study Trips, mailing list for membership recruitment, and staff professional development
    - Telecommunications Network equipment purchases for stock replacements
    - Marketing Shared Services IT requirements
    - Marketing Shared Services Suite furniture (funded by University Budget Office)
  - Successfully completed the division's PCI Compliance process for CY23.
  - Refreshed our Cash Management Procedures.
  - Completed the All Funds Budgeting process for FY24 and was successful with all three requests!
- Print & Mail Services. Print & Mail Services experienced underrealized revenue receipts for this fiscal year. We had been keeping a close eye on this activity for many months, commencing in January 2023, following the negative trend. Additionally, expenses were exponentially increasing. The root cause was losing their largest customer, Center for Urban Affairs (who purchased their own printers). In consultation with the University Budget Office, we put in place a plan where we charge for internal operations to NCSCaLE departments for internal printing and mail services. We would continue to bill for external client services and clients of NCSCaLE departments. We implemented phase 1 of the plan April 2023 and have completed a final draft of the process and billing requirements that will be reviewed by NCSCaLE departments July 2023. We have completed our internal cost analysis and will be able to fund Print & Mail Services through 50% internal services charges and 50% client based revenues.
- Assist the Office of Interdisciplinary Programs and the Office of Instructional Programs Vice Provosts & Business Office Teams with business services and processes, increasing efficiency and enhancing compliance and internal controls. Assist with maximizing resources. **Progress:**

- Assisted in the preparation of the <u>FY 2023-2024 All Funds Budget Presentation and Request</u>
  - Successfully requested and received:
    - $805,000 for MCTC Restroom Renovation
    - $761,730 for LED Parking Lot Lights
    - $75,000 (salary) for a new Project Manager position
- Completed the <u>FY 2023-2024 5-Year Budget Process</u> in time and submitted requests to the University Budget Office March 31, 2023. Budgets have been accepted. Provided the first division <u>budget presentation</u> of the FY24 budget all staff in May 2023
- Completed revision of the <u>NCSCaLE Cash Management Policy</u>, refreshing and consolidating deposit, cancellation and refund policies for the various departments in Continuing and Professional Education.
- Completed and provided recommendations for the new MarComm DELTA/NCSCaLE Shared Services proposal.
  - <u>Analysis</u> with <u>Proposal Review & Cost Analysis</u>
  - <u>Signed MOA DELTA_NCSCaLE MarComm</u>
- We executed the first ever division recall process, recalling unobligated state appropriations to support reserves requests ($19,894).
- We will close the 2022-2023 fiscal year in good financial standing with nearly achieving our requested deferred revenue to support activities this next fiscal year where we received revenues this fiscal year. Fund balances look very good across programs and departments with the exception of OLLI where we are still building their balance. With OLLI's new programming, we look forward to higher levels of participation and increased revenues.
- <u>Monthly financial statements</u>. Provide monthly statements to division senior leadership, providing detailed information, at the divisional and department level, of financial progress, milestones, and detailed analysis. Through this process and sharing, all decision makers gain an understanding of how the division is performing and how their day to day work makes an impact which boosts confidence and provides for effective decision making. An additional benefit is that everyone gets the same access to data, opportunities for collaboration and additional insights can grow.
- As we were able to hire staff for our five accounting positions (one remains vacant at this time) the team requested more flexible working arrangements, meaning more time working remotely. We submitted a <u>NCSCaLE Business Office Hours of Operation Survey</u> to our division departments to help us create an onsite work schedule that meets the needs of the division while allowing the business office team members more flexible work arrangements. The results of the survey noted that the business office should remain open and staff during the entire work week and that the operating hours be 8:00 am to 5:00 pm.

NCSCaLE FY2022-2023
As of June 30, 2023

Agency Funds
1.2%
Gifts & Endowments
5.9%
Foundations
2.8%
Contracts & Grants (FYTD Ex…
33.7%

State Appropriated
5.0%
Appropriated Receipts
21.4%
F&A (Overhead/Indirect)
1.5%
Auxiliaries
1.2%
Misc. Sales & Service
27.3%

- From the results and our business office collaboration, we redefined our work schedules on site while maintaining 5 days a week onsite staffing with Friday's by appointment only:
- Purchased a drop box for deposits for after hours and/or when team members are unavailable.
- **Revised our Check-Receipt Process** to be in compliance with General Statute. Our business office is a forward facing enterprise where we require at least three days onsite work in order to ensure compliance with General Statute 147-77 which requires that all revenues and receipts collected by a state agency be deposited no later than the next business day following the date of collection. Our current schedule complies with the statutory requirements with deposits on Mondays, Wednesdays and Thursdays.
- Each team member may have up to two days remote with three days onsite.
- With the installation of the drop box, we are able to close the office at 4:00 pm daily. We have found that there is very little foot traffic in the business office after 4:00 pm and we needed to address security on the second floor.
- Position postings include the expectation of three days on site work.
- We have not received any complaints or issues with our new schedule.
- Friday staffing has been difficult and we were unsuccessful in hiring a temporary employee to staff the office for that one day. With recruitment, retention and Friday onsite staffing major issues for us, we requested and received approval to convert Friday staffing to by appointment only.
- Implemented new subaccounting for OLLI to support their new year programming. This process should allow OLLI detailed information on their

refreshed programming to ascertain if marketing efforts have an impact on their offerings.

- Implemented new Payment Inquiries & Opening of Mail procedure to assist NCSCaLE departments with payment information and drop off procedures.
- Proposed new Space Committee for division in June 2023
  - NCSCaLE's Space Committee facilitates strategic planning and communications about space needs and space-related issues across the division. This committee is not a decision-making body; rather, members leverage their perspective to provide insight into issues involving space. The NCSCaLE space committee considers space needs, provides feedback on planning for space, and presents ideas and recommendations to the NCSCaLE Senior Management Team for final consideration and Vice Provost approval.
  - Senior Management Team input deadline is July 12, 2023
- Develop new NCSCaLE Sales Forecast, Event/Program Budgeting (300~) and feed to overall budgets through Smartsheet application
  - Cost/budget analyses and outcomes measures
  - ROI to achieve their transformation/revise goals and objectives
  - Consultation and development July-August 2022
  - Project Status:
  - The implemented solution for OPD enables the team to have standardized methods for entering, review and approving events, continuing education programs and conferences. The process for aggregating financial data across programs has been automated, both reducing the amount of time spent on manual data entry and improving the reporting process. Additionally, the financial data from PeopleSoft has been integrated into the solution which enables comparison between budgeted and actual values within Smartsheets.
  - Phase 1 developed
    - Data Entry - 4th quarter FY23
    - Data Analysis/Cleanup - 1st quarter FY24
    - Assessment 2nd quarter FY24
  - Phase 2 specifications and Phase 1 enhancements requirements 12/31/2023
    - Expand - onboard OLLI and other continuing professional development programs
    - Phase 2 development 3rd quarter FY24
- **REPORTER Business Analysis: Corporate Training and Development**. In collaboration with AVP Business Operations and customers, gather requirements and recommend a design for corporate training functionality that allows for bulk purchases and purchase order payments within REPORTER.
  - Work with the REPORTER support manager and team to determine the best development approach, functionality, and timelines.
  - Develop use case scenarios, testing cases, coordinate testing, and implementation of new functionality.
  - Develop support documentation
  - Train users on new functionality
  - Add Accounts Receivable Reporting (current, 30, 60, 90, and 120 days)
  - **Project Status:**

- Annette Jeffes, our new Director of Customized Training & Development was recently hired. We have had several conversations with her and asked when we can begin work on this project and we agreed on August 2023.
- The REPORTER Business Office team (includes members of the DELTA/NCSCaLE business operations team) will begin constituting the committee in July/August with a first meeting in September.

OFA Goals for FY 2023-2024 include:

- **Goal #1, Business Continuity Leadership**, supports NC State Goal 1, 3, 5, & 6; DELTA Goal 2, 3 & 4; NCSCaLE Goal 1, 2 & 5
  - Maintain adequate staffing to ensure excellent support for our faculty and students to provide recommendations to fund Instructional and Interdisciplinary Units' strategic plan (DELTA, NC State Continuing & Lifelong Education, and REPORTER) new positions during the annual strategic plan refresh and the 2023-2024 budget planning process. This includes financial and business-associated positions at DELTA, NCSCaLE, and REPORTER.
  - Cross Training Plan
    - Develop a team cross training plan
    - Phase 1: Voluntary, ease team members into learning about each division
    - Phase 2: Review below shared functions, process and responsibilities and determine cross division
      - Backup team member(s)
      - Incorporate professional development goals; requests for growth to structure
      - Develop cross division subteams
  - Business Services Total Services (new)
    - Review shared functions, processes and responsibilities between DELTA and NCSCaLE (FY24 list; expand based on research)
      - Insurance
      - Inventories - Asset Panda
        - Docusign Integration
        - Components for DELTA
      - Purchasing - IT/Software Contracts
      - SAR
      - Travel Setup
    - Research CALS Business Office Shared Services model
    - Investigate processes that may be used/beneficial to incorporate in DELTA/NCSCaLE model
- Human Resources Total Services implementation (shared services)
  - Support Diversity & Inclusion initiatives
  - Support Wellness Program & Recognition initiatives
  - Review, submit and ensure resources plan for targeted NCSCaLE Salary Analysis by March 2024
  - Streamline Onboarding/Offboarding across divisions; providing concierge service for NCSCaLE
  - Begin project to update position descriptions within NCSCaLE, first actions would

be based on the market/equity analysis
- ○ Survey sign-on and retention bonus for current positions in both divisions
- ● Directly supervise two division business offices and mentor and train business office team; building a nimble, flexible and healthy team
    - ○ Onboard and train remaining vacant position (Finance & Budget Analyst)
    - ○ Continue working on building a Healthy Team, incorporating all business office staff to form a more cohesive and inclusive team
- ● DELTA/NCSCaLE Business Operations Customer Service Survey, fall 2023
- ● HR Actions Workflow
    - ○ Create a process and explore the use of the Smartsheets application for both divisions to request position actions, recruitment, consultative services and onboarding/offboarding
        - ■ Transparency for both divisions
        - ■ FIFO queue, with the option to expedite certain actions
        - ■ Historical tracking
        - ■ Allow an option for scheduling consultations to ensure workload balance
        - ■ Create a general HR inbox in order to provide efficient services across divisions
- ● OnBase Project. Create a project plan outline to add files to the OnBase system
    - ○ Shred files per retention guidelines
    - ○ Scan and upload separated files from all sources - X drive, Google Drive, or other repositories, this include all paper files
    - ○ Scan and upload active files from all sources - X drive, Google Drive, or other repositories, this include all paper files
    - ○ Complete by March 31, 2024.
- ● Assist HR Team Lead with research and reviewing Employee Journey Maps or Career Planning visuals for each classification [if time allows]
    - ○ Visually, the Employee Journey Map represents the stages of an employee's experience (like onboarding). Each stage of the Employee Journey includes Moments, or the touch-points employees encounter during those Journeys (like the "90 days check-in" or the "connecting a new hire with their buddy").
    - ○ Initially, Create a journey for certain positions, which will need assistance from hiring supervisors, team leads, and Directors
    - ○ Work with the NC State Career counseling unit to develop a pilot
- ■ If resources are variable and we complete this first phase, possible implementation FY25 for a small group of new hires
- ○ NCSCaLE IT (Telecommunications Network)
    - ■ After reviewing our NCSCaLE G, H, and I drives and backup processes with Rob Chapman, we agreed that we really need an inventory of the files on the G, H, and I drives and have the respective departments review the inventories to determine what files can be deleted and what files should be kept, according to the University/System Office Disposition Schedule. This will be a 3 to 4 month process/project
        - ● From the completion of the inventory/assessment, we should have a lot of freed up space to be able to manage any limitation allotment that is coming out soon on Google Drives and Google Share Drives

- Since CPE owns most of the files, we request Savannah Vince provide project coordination services.
- We also need to scan the drives for red and purple data as the files are very old.
- We most likely will not want to start this project until September or October.

- **Goal #2, Strategic Financial Planning, Analysis & Challenges**, supports NC State Goal 1, 3, 5 & 6; DELTA Goal 2, 3 & 4; NCSCaLE Goal 1, 2, & 3

  Continue to oversee and manage a budget composed of state funds, auxiliary sales & services, endowments, foundations, gifts, and student fee receipts for DELTA, NCSCaLE, and REPORTER. Assist units with financial and efficiency challenges:
  - Develop a Business Services Shared Services strategies
    - Total Human Resources Services - foundation approved February 2022; implementation June 1, 2022
    - Continued to refresh business operations structure and enhance operations for account administration, budget, and other business services to ensure internal control and enhanced customer service
      - Provide recommendations for senior leadership review
      - DELTA, REPORTER, and NCSCaLE
    - Cash Analysis/Cash Flow Report Refresh
      - Provide better analysis of the Cash Flow and Analysis of NCSCaLE'S Projects to include additional departments. This is a measure of risk with the current report outlining the departmental funds that are most risky. This goal will include all other cash funds that receive external revenues to ensure the report is all inclusive, regardless of risk level.
      - New report available January 2024
    - Assist Vice Provost in developing plans for (to include work already complete above)
  - Space Planning & Management
    - Assist ODE with Testing Services Center space needs
      - Alternatives for Space/Lease request submitted March 9, 2022
      - University Space Committee reviewing
      - As of July 1, 2023, we still do not have a resolution
  - Assist DELTA with beginning phase of new lease/location; current lease expires with 33 month extension through June 24, 2027; however, plans need to be begin two (2) years prior and submission of space request 1.5 years prior to final option termination; research alternatives, provide recommendations for new design opportunities for onsite design/hotelling
  - Assist DELTA Space Committee with recommendations based on new flexible work arrangements
  - Proposed new NCSCaLE Space Committee for division in June 2023

- - NCSCaLE's Space Committee facilitates strategic planning and communications about space needs and space-related issues across the division. This committee is not a decision-making body; rather, members leverage their perspective to provide insight into issues involving space. The NCSCaLE space committee considers space needs, provides feedback on planning for space, and presents ideas and recommendations to the NCSCaLE Senior Management Team for final consideration and Vice Provost approval.
    - Senior Management Team input deadline is July 12, 2023
    - Implement fall 2023
- Print & Mail Services Business Plan. Completed plan and financial analysis by February 2024 as part of FY25 Budget Cycle due to the Budget Office March 2024. The goal is to find a financial model that retains Print & Mail Services while also ensuring sustainability.
- Realign resources to assist Units with transformational goals to meet new challenges
- Work towards making the use of REPORTER an institutional policy for those wanting to use WolfWare Outreach; actively market new functionality to campus to increase usage of each REPORTER application by *10%*; Wolfware Outreach application projecting zero growth; rate increase 7/1/2025 (completed spring 2023)
- Assist Vice Provosts & Business Office Teams with business services and processes, increasing efficiency and enhancing compliance and internal controls. Assist with maximizing resources.
- Develop new NCSCaLE Sales Forecast, Event/Program Budgeting (350~) and feed to overall budgets through Smartsheet application
    - Phase 1 developed
        - Data Entry - 4th quarter FY23
        - Data Analysis/Cleanup - 1st quarter FY24
        - Assessment 2nd quarter FY24
    - Phase 2 specifications and Phase 1 enhancements requirements 12/31/2023
        - Expand - onboard OLLI and other continuing professional development programs
        - Phase 2 development 3rd quarter FY24
    - Contribute and analyze with DELTA colleagues proposals and agreements between DELTA and other Provost units for shared services models and/or partnerships for Marketing and Communication and Program Planning and Development

- **Goal #3, REPORTER Business Services Leadership**, supports NC State Goal 1, 3, 5 & 6; DELTA Goal 2; NCSCaLE Goal 1
Partnering with the University Controller's Office and the REPORTER development team
    - Fully implement new versions of the financial training agenda and documentation
        - Collaborate with REPORTER team to improve REPORTER Financials onboarding
            - Work with Research and Analysis to develop stakeholder survey
                - What is working/Not Working

- - - ○ What they like/dislike
          ○ What do they need/wish list
        ● Consultation with Latoya, Lugenie, Holly, possibly Tamara - IES - to gain their perspective on the financials
      ■ Implement new financials onboarding training in/through REPORTER
        ● Possibly 2 courses
          ○ Mandatory Financial Liaisons
          ○ Financial Admins
    ○ Develop business units/college/division dashboards
    ○ Design of Corporate Contractual Training
      ■ Lead work group of NC State business unit stakeholders in gathering requirements and recommend a design for corporate training functionality that allows for bulk purchases and purchase order payments within REPORTER.
      ■ Develop use case scenarios
    ○ Create Accounts Receivable Reporting (current, 30, 60, 90, and 120 days)
    ○ Billing setup for Wolfware Outreach suite of services in REPORTER
  - As data steward for REPORTER business operations and a member of the REPORTER Steering Committee, continue to provide input on the application and appropriate business operations

==Staff: Major new appointments, kudos, professional activities and recognition==

- Adalia A. Sova, Assistant Vice Provost Business Operations, DELTA/NCSCaLE :
    ○ Certified Department Purchasing Representative
    ○ Forecasting, Budgeting, and Managing Money in an Environment of Uncertainty and Risk (UPCEA)
    ○ REPORTER Steering Committee Standing Member
    ○ Strategic IT Committee, EAC representative (October 2021 - September 2022)
    ○ University Human Resources Succession Planning Work Group
    ○ University Equipment Checkout Work Group
    ○ University Smartsheet Review Work Group
    ○ University Finance & Administration Business Leads
    ○ University Human Resources Leads
- Holly Foz, Accounts Receivable/Cash Management Accountant
    ○ Leadership Education and Development Foundations Certification-88% Completed
    ○ Leadership Education and Development Advance Certification-35% Completed
- Ada Benitez, Accountant - appointed November 14, 2022
- Catherine Davvis, Accountant - appointed June 19, 2023
- Angela Hallman, DELTA/NCSCaLE HR Team Lead, Provost Awards for Excellence 2023 Human Relations, Winner

Challenges: Recommendations and Concerns for the Future:

- FY 2022-2023 Division-wide:
  - Being fully staffed is key to our productivity as a division
  - The revenue from the Digital Skills boot camps affords us the opportunity to seed fund a restructuring of our marketing services in conjunction with DELTA, and to possibly add staff positions
    - We are conservatively planning our spending because we don't yet know if the revenues for these boot camps will continue to pace this way year over year
    - Our investments from this fund will be seed funds that lead to self-sustaining revenue generation within a two-to-three year window of time
  - Budgeted a 2% across the board salary increase; will need to adjust FY24 budgets based on authorized new Biennial State Budget and approved raises
  - Benefits costs increases year over year (Health Insurance & Retirement)
- FY 2022-2023 (F&B):
  - Conferences hotel and reservation deposits. We do not have the fund structure to support this in CPE. We will need to support this practice as hotel and catering companies business models have changed as impacted by the pandemic. Further discussions with the Vice Provost and Director, CPE to create a source of funds within the division is needed - a revolving loan fund if you will; without interest.
  - Filling our final position, Finance & Budget Analyst in the fall 2024. After reviewing the duties and responsibilities, the position classification of Accountant III does not accurately reflect the full scope of the position. While 45% percent of the duties are accounting, the remainder of the duties include analyzing budgets and financial data, developing estimates, establishing cost allocation distributions, and dashboarding and reporting fiscal position at the program level, department level and rolled up to the division level for leadership consideration and decision making. This position will aid greatly with our 1) Smartsheets OPD Sales Forecast project and phase 2 implementation, 2) OLLI subaccounting analysis and expansion of our Smartsheets project to include OLLI's activities, 3) Program Closeouts, and 4) auditing business office transactions.