

**INSTITUTIONAL ADVANCEMENT  
DRAFT ASSESSMENT PLAN**

The division of institutional advancement provides leadership in building awareness and support for SUNY Cortland and its mission. The Division does this by establishing and nurturing mutually beneficial relationships between and among campus community members and external constituencies.

In order to achieve this mission, the office of the Vice President for Institutional Advancement provides leadership, direction, resources, and support for the four functional areas that make up the division.

The four major areas in the division are: Alumni Affairs, Development/Fundraising, Publications and Electronic Media and Public Relations. The Vice President also serves as the Executive Director of the Cortland College Foundation, Inc. and has leadership responsibilities for that organization as well.

Goal	Sub-Goal Objective	Alignment with College-Wide Division, or Other Planning Goals	Action Required or Activities & Strategies	Indicator of Success or Assessment Measures & Criteria	Target Completion Date	Resources Needed	Person Responsible For Oversight	Outcomes	Recommendations
1. To provide leadership and support for the four functional areas and the Foundation staff.		* Goals 1-5	<p>1a. Meet with area directors on a bi-weekly basis to become informed regarding issues, concerns, and challenges facing each area.</p> <p>1b. Meet weekly with VPIA Cabinet in order to share issues of concern to all functional areas and to allow area directors to share information and receive support from colleagues.</p> <p>1c. Meet with division staff at least three times each semester to give all members the opportunity to share information and ideas.</p> <p>1d. Circulate minutes of all Cabinet meetings to the division and the President's Cabinet.</p> <p>1e. Attend SUNY CUAD, CASE and other professional association meetings and seminars. Share information received with staff as appropriate.</p> <p>1f. Maintain an open door policy for all staff within the division.</p>	<p>1a. Survey all directors to determine effectiveness of bi-weekly meetings.</p> <p>1b. Survey all IA staff who attends bi-weekly meetings to determine effectiveness of weekly staff meetings.</p> <p>1c., 1d., 1f. Survey IA divisional staff to determine the degree to which they are informed and believe that they have ample opportunities to share ideas, concerns, and information.</p>	For all surveys, August 2008	Minimal	VPIA		

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2. To establish effective working relationships with the President and the other members of the President's Council.		*Goals 1-5	<p>2a. Be well prepared to attend all Cabinet meetings, representing the divisions' concerns and issues effectively and appropriately.</p> <p>2b. Meet with the President weekly and as otherwise needed in order to understand the priorities of the President's Office and the College.</p> <p>2c. Meet with individual Vice Presidents as needed in order to understand how the division can support the priority needs of individual divisions of the College.</p> <p>2d. Attend President's Council meetings and share pertinent information with members.</p> <p>2e. Meet with President Council members as needed to maintain good communication and understanding of issues related to all functional areas represented on the Council.</p>	<p>2a.-2e. Survey members of the President's Cabinet to determine VPIA's effectiveness as member of the President's Cabinet, level of preparedness, degree of understanding of College's priorities, etc.</p> <p>2a.-2e. Annual evaluation by the President, including secondary sources will also provide assessment of VPIA effectiveness.</p>	<p>Survey of President's Cabinet, July 2008</p> <p>Evaluation, December 2007</p>	Minimal	<p>First survey, VPIA</p> <p>VPIA evaluation, College President</p>		

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3. To effectively represent the College in the greater Cortland business community.	<p>3a. Become an active member of the Chamber of Commerce Board of Directors.</p> <p>3b. Continue to be an active member of the Cortland Rotary Club.</p> <p>3c. Communicate regularly with the business community about the College and its impact on the local economy.</p>	*Goals 1 & 5	<p>3a. Regularly attend Chamber Board meetings. Regularly attend Chamber events. Regularly bring materials which promote the College to Chamber meetings. Meet with Chamber members individually to promote the good work of the College to encourage partnerships and support.</p> <p>3b. Regularly attend Rotary Board meetings. Agree to serve as officer of the Rotary Board. Look for opportunities to feature College faculty, staff and programs at Rotary meetings. Meet with Rotary members to discuss strategies for partnerships and support.</p> <p>3c. Work with the economics department to complete an economic impact reports every three years. Communicate with local businesses at least once each year to inform them of College's central role in the Cortland economy. Meet with local area business leaders to cultivate relationship with the College. Invite local area business leaders to special events at the College.</p>	<p>3a. and 3b. Survey chamber staff and Rotary leadership to determine the degree to which these activities and strategies are being successful.</p> <p>3c. Study is completed and circulated broadly every three years. Local businesses are surveyed to make sure that they received and read the report.</p>	<p>Summer 2009</p> <p>Summer 2009</p>	<p>Minimal</p> <p>\$2000</p>	<p>VPIA</p> <p>VPIA</p>		

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<p>4. To establish excellent working relationships with local, state and federal government officials.</p>	<p>4a. Meet regularly with the Mayor, as well as other local political leaders to discuss areas of mutual concern.</p> <p>4b. Meet with Senator Seward and Assemblywoman Lifton at least twice each year. Effectively communicate in person and in writing with them to keep them informed about the College.</p> <p>4c. Communicate with federal officials as appropriate to garner their support for the College.</p>	<p>*Goals 1-5</p>	<p>4a. Invite the Mayor to campus for a lunch meeting at least once each year. Go to City Hall to meet with the Mayor at least once each year. Invite Mayor to special events in order to cultivate his interest in the College and his understanding of the excellence that pervades the campus. Meet with other elected officials as well as appointed officials of the city and county as necessary.</p> <p>4b. Attend Cortland Coalition meetings on campus. Provide the Senator and Assemblywoman with current “good news” about the campus. Ensure that an effective group of campus representatives attend SUNY lobbying efforts in Albany. Attend local events that feature the Senator and Assemblywoman as often as possible.</p> <p>4c. Write, e-mail, call or visit with federal officials as necessary to inform them of the exciting programs on the campus and inform them, as appropriate, of the impact of pending legislation on the campus.</p>		<p>Summer 2009</p>	<p>Minimal</p>	<p>VPIA</p>		

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<p>5. To recruit and develop effective Alumni and Foundation Boards of Directors.</p>	<p>5a. Discuss prospective Board members with area directors, the President, members of the College community, and members of the community at large.</p> <p>5b. Develop a five-year recruitment plan for both the Alumni and Foundation Boards.</p> <p>5c. Create an annual in-service training program for both Boards.</p> <p>5d. Provide appropriate written information to both Boards in order to keep them informed about the College.</p>	<p>*Goal 1-5</p>	<p>5a. Include this goal as part of Executive Director of Alumni Affairs performance program. Include this on the agenda of the President's Cabinet once each year. Discuss with Chair of Nominating Committee for both the Foundation Board and the Alumni Board. Discuss the importance of identifying new members with both the Alumni Board and Foundation Board. Cultivate interest in the Alumni Board and the Foundation Board, as appropriate with alumni and friends of the College.</p> <p>5b. Study the Board appointments with attention to the appointment expiration dates, Board make up, Board members' strengths, etc. Develop profile of prospective Board members based on analysis. Develop pool of prospective Board members. Approach prospects in timely fashion, relative to appointment dates.</p> <p>5c. During the summer of each year, develop an in-service training program which deals with Board, Alumni Association, Foundation, and College information and issues. Assign time at each Board meeting to Board education.</p> <p>5d. Send both Boards copies of the Bulletin, as published. Ask the Director of Public Relations to send selected press releases to Board members which will inform them of current, exciting events and activities at the College.</p>		<p>Summer 2009</p>	<p>Minimal</p>	<p>VPIA</p>		

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6. To provide leadership for the development of an integrated marketing program.	<p>6a. Study the Stamats report and take a leadership role in bringing the plan to fruition.</p> <p>6b. Work with the Director of Public Relations and the Director of Publications and Electronic Media to develop a strategy to develop an integrated marketing program for SUNY Cortland.</p> <p>6c. Garner financial support of the Cabinet to invest in a marketing program for the College.</p>	*Goals 1-5	<p>6a. Meet with campus branding committee members to discuss strategies for implementation. Arrange a final meeting between Stamats staff and President's Cabinet. Discuss both short and long term strategies for full implementation of critical Marketing Action Plans (provided in reports). Select most powerful and cost effective plans for implementation. Implement actions plans as expeditiously as possible.</p> <p>6b. Include a discussion of integrated marketing at each individual meeting with the Directors of Public Relations and Publications and Electronic Media. Develop a 6-12 month roll out strategy with the professionals on campus who will be responsible for assisting with the roll out of the plan.</p> <p>6c. Discuss the importance of the project at Cabinet and with individual members of the Cabinet in order to ensure a full discussion of all of the issues associated with integrated marketing.</p>	At a minimum, the first three Marketing Action Plans in the Stamats report will be completed.	Summer 2008	At least \$300,000	VPIA		

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7. Provide administrative support and direction for the Cortland College Foundation Board of Directors.		*Goal 1	<p>7a. Plan four quarterly Board meetings per year ensuring that meeting venues are arranged, refreshments and lunch are provided, appropriate presenter(s) are scheduled, agenda and Board meeting packets are prepared in advance and mailed to members, and minutes at Board meetings are accurately and completely maintained and furnished to Board members in a timely manner.</p> <p>7b. Arrange meetings and prepare materials for all Foundation committees (finance, development and nominating and by-laws).</p> <p>7c. Provide information and assistance to Foundation directors as requested.</p>	Survey of Foundation Board members will indicate a high level of satisfaction with regard to the appropriate of meeting venues, timeliness and completeness of materials provided, accuracy of meeting minutes provided.	Summer 2008	Minimal	Secretary 2 in VP/IA Office		

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8. Oversee and maintain IA state budget accounts.	<p>8a. Routinely examine SUNY Employee SMRT site and view accounts for expenditures and balances and communicate with VP or area directors if budget levels suggest deficit condition in order to make appropriate corrections or changes.</p> <p>8b. Review monthly procurement card holder log sheets.</p> <p>8c. Provide oversight to make sure all policies and procedures are followed.</p>	*Goal 1	<p>8a. Make corrections if errors are detected. Alert unit heads of impending budget shortfalls. Move resources among expenditure categories as needed.</p> <p>8b. Inform business office of any errors. Discuss any expenditure that is unclear.</p> <p>8c. Review all purchase or voucher submissions or compliance.</p>	Budgets will always end the year in the black. Audits will never find inappropriate expenditures or failure to comply with state policies for the division. Business Office will find fewer than five transactions per year that are questionable.	Ongoing assessment.		Secretary 2 in VPIA Office		

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9. Coordinate and attend friend-raising/cultivation and naming events for donors, alumni and friends of the College.		*Goals 1-5	<p>9a. Identify and provide input on constituent groups for invitations.</p> <p>9b. Produce invitations and mail to guests in a timely manner.</p> <p>9c. Reserve venue, order refreshments/meals and provide set up details to necessary staff.</p> <p>9d. Provide assistance to guests as needed.</p> <p>9e. Work to provide a pleasant, positive experience which represents the College in a positive manner.</p>	Invitees will be surveyed to determine the degree to which the special events was viewed as a positive experience, putting SUNY Cortland in a positive light with donors, alumni, friends of the College, etc.	2010	Minimal	Secretary 2 in the VPIA Office		

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10. Develop IA special events schedule which supports the divisions' mission.		*Goals 1-5	<p>10a. Request all IA special event dates/details from IA staff members twice a year and compile schedule.</p> <p>10b. Meet and go over schedule with representatives from IA and the President's office in order to coordinate and determine President's involvement.</p> <p>10c. Work cooperatively with the President's office on upcoming events.</p> <p>10d. List all events on the IA Outlook calendar.</p>	Survey of people involved in the planning process will indicate that all felt that the process was well organized and sensitive to the schedule of the President's Office as well as other staff members. People will also judge the schedule of events to be supportive of the division's mission and strategic goals.	Summer 2009		Secretary 2 in the VPIA Office		

**\*SUNY Cortland Institutional Goals  
2005-2010**

- 1. Provide the supportive environment in which our students, faculty and staff can realize their potential and develop the skills, knowledge and flexibility needed in a changing world.**
- 2. Achieve national prominence in several programs of research and graduate study.**
- 3. Foster an international perspective in our teaching, research and serve programs.**
- 4. Become a more inclusive and diverse campus.**
- 5. Become the leading partnership college within SUNY by increasing the number and the quality of our student and faculty civic engagement initiatives within the community and the region.**

Prepared: 1/30/2007  
Raymond D. Franco, Interim VPIA  
Melony Warwick, Secretary 2