

PENN STATE COLLEGE OF AGRICULTURAL SCIENCES

College Relations and Communications Office



Connect, Collaborate, Communicate
Strategic Plan 2009–2013

PENNSTATE



College Relations and Communications Office

Strategic Plan 2009 – 2013

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Introduction

The College of Agricultural Sciences' College Relations and Communications Office is a component of the dean's office that manages the college's relationships and communications with external clientele groups. The office also provides administrative support for college and departmental outreach initiatives and develops mutually beneficial relationships with stakeholders that lead to support for the college.

"The mission of Penn State's College of Agricultural Sciences is to discover, integrate, and disseminate knowledge to enhance the food and agricultural system, natural resource and environmental stewardship, and economic and social well-being, thereby improving the lives of people in Pennsylvania, the nation, and the world."

The office focuses on four primary external audiences – future students, alumni, industry, and public officials - and provides administrative support for the College Alumni Society, Armsby Honor Society, Penn State Ag Council, and Ag Action Network. The college Office of Conferences and Short Courses works with college units and faculty to facilitate and administer high-quality outreach programs and was integrated into the College Relations Office in 2005. The Ag Communications and Marketing Unit, whose focus is to deliver strategic information to college stakeholders, was added to the College Relations Office in 2007. These offices have been integrated in order to benefit from the common missions of enhancing relationships with college stakeholders. (See Appendix A for College Relations and Communications operational chart)

College Directive

The current (2008–2013) College of Agricultural Sciences strategic plan continues to emphasize the importance to the college of relationships and partnerships with stakeholder groups as well as the need for public education around agriculture literacy. It provides the foundation for the strategic plan for the College Relations and Communications Office. The college strategic plan directly charges the College Relations and Communications Office to:

- Intensify college marketing efforts to increase awareness of program relevance.
- Increase the number and quality of conferences and short courses offered.
- Increase the quality and effectiveness of college publications.
- Establish and build on existing partnerships with government agencies.
- Expand opportunities for current and new stakeholders to provide strategic advice.
- Improve the dissemination of research results.
- Enhance stakeholder and public education.
- Enhance recognition, reporting, and distribution of our programming's impact.

The college strategic plan also places strong emphasis on funding challenges and what it will take to keep the college sustainable into the future. The *Report of the Working Group on Sustaining and Advancing College Excellence*, March 2008, details issues and actions deemed necessary to implement a sustainable model for the college. That report also emphasizes the importance of college relationships with various stakeholder groups and the need for continued investment in aggressive marketing and communications, and specifically states:

- The effort that has been devoted to increasing student recruitment (e.g., by increasing the attractiveness of our majors, improving curriculum, and strengthening recruitment activities) needs to be continued and expanded to reach non-traditional populations.
- Develop a communications strategy to communicate the value of our teaching, research and extension programs to legislators, key stakeholders, public officials, and the public at large. This strategy should be Web-based at its core with printed materials derived from the Web resources.
- Print-on-demand capabilities should be established and the expensive storage of college publications eliminated.
- All advances in research, teaching and extension should generate several communications products including Web modifications, news releases, popular articles, radio spots and television programming. Web and publications editors as well as the college communications and marketing staff should aggressively pursue communications products.
- Beat reporters should be established so that these communicators can become knowledgeable about technical issues. The communication of research results and publicizing the impact of research should be accorded greater priority in faculty evaluation and rewards.

Strategic Issues and Direction

No area of communication has changed more rapidly than that of digital technology in social interaction and media. A new vocabulary – Twitter, FaceBook, Google, Delicious, StumbleUpon, Linked-In, MySpace, YouTube, Blogs, RSS - defines not just how we get information, but how we manage and respond to it. These technologies have transformed the one-way information flow from sources, such as our college, into a multidirectional “Web” of viral information distribution and editorial responses – shifting from a monologue to a dialogue. Opportunities now exist to leverage information and reach out further and faster to new and existing audiences with messages and information. Wise utilization of these constantly evolving **technologies** and networks that allow instantaneous connection with people around the world is an ongoing challenge in terms of staff, skill and resource allocation.

Along with a dramatically changing technological environment, the college is facing a changing economic and political environment, where resources are scarce, public funding is increasingly competitive, and where the bar has been raised for programs to demonstrate their relevance, impact, and justification for funding. It is more imperative than ever that we ensure our unit is run efficiently and that we are creative in our methods to **implement cost-savings strategies**. We need to evaluate everything we do and how we do it to ensure we are doing the right things, and doing things right.

The College Relations and Communications Office has finite resources to accomplish these aggressive communication and marketing goals for our clients and the college, as well as manage stakeholder relations and education. The college is a large, complex institution with extensive communication needs that our unit cannot comprehensively address. As such, we (collectively) must **focus** our resources on areas of excellence and uniqueness that will strategically position us in the market place. Our unit must strategically **prioritize our audiences and our products** in order to maximize the return on investment for the college and our clients and accomplish college level goals.

Although our strategic focus is on college level goals, we understand this is accomplished through client-level projects. We must ensure the highest standards of **customer service**, ensure a quality product, and build solid relationships built on mutual respect and a keen awareness of our client's needs.

In order for the College Relations and Communications Office to accomplish these goals in this changing environment it is increasing clear the job of relationship building and communications must engage **all** college employees. We are partners in the process and need to improve **internal communications** and foster broad **college understanding** of our purpose, priorities, goals, and strategies to garner internal support and collaboration in this effort.

To do so, the office will focus on five key strategic areas:

1. **Enhance Office Use of Technology**

In an effort to increase reach, innovation, efficiency, and relevancy we must stay current, evaluate, adopt, promote, and support appropriate emerging and evolving technologies. We must:

- Continue to implement project management technologies such as SharePoint.
- Enhance utilization of technology to measure and provide data for decision-making.
- Enhance the use of social networking and interactive media opportunities to remain relevant to technically savvy audiences.
- Enable emerging communication channels.
- Address obstacles to implementation of emerging technologies such as training needs, fear of technology, costs, overhead, skills, etc.

2. **Increase Efficiency and Implement Cost Saving Strategies**

The college is facing challenging economic times, and it is imperative for all units to be outstanding stewards of the resources they receive and manage them for the highest return on investment (ROI) for the college. We must:

- Communicate budget challenges internally, the need for all to initiate cost saving strategies, and the need to do more with less (work smarter.)
- Recycle products for maximum use and ROI.

- Use data and feedback to constantly evaluate ROI and adjust services, product, and delivery methods.
- Evaluate the implementation of unit financial policies to ensure wise use of college resources.
- Evaluate opportunities for cost recovery such as grant funding and fees for services.

3. Enhance ROI by Prioritization of Target Audiences and Products

Recognizing that the demands/expectations from our unit consistently exceed resources/ability to deliver, we must:

- Develop and communicate criteria for investment in products and services.
- Focus resources based on strategic priorities of the college and highest return on investment.
- Identify and prioritize diverse target audiences using college strategic priorities and desired outcomes.
- Maximize utilization and distribution of all communication products.
- Evaluate effectiveness of products and services and adjust accordingly.
- Evaluate opportunities to more closely align communication budgets to strategic priorities.

4. Improve Internal (Unit and College) Communications

We recognize that there is mutual benefit in clearly communicating our office's value, services, and methods to the college and faculty to both garner an understanding of, and support for, our services and products and to benefit from the input and partnership with faculty and staff in development of services and key messages and impacts. We must:

Unit Communications

- Ensure consistency in communication of office's mission, priorities, and services.
- Define rationale, criteria, and policies for strategic prioritization of products and services.
- Create a clearly defined "package" of services, products, and expectations to offer to clients.
- Build College Relations and Communications team attitude of understanding and cooperation throughout unit.

College Communications

- Clearly communicate to the college and faculty office goals, policies, criteria, services, products, expectations, and rationale.
- Focus college/faculty on strategic priorities for highest ROI to the college.
- Identify key points of contact in each college priority area and develop processes for input into content and defining emerging issues.
- Build partnership between Ag Communications and Outreach to better define roles, priorities, and ensuring college look, feel and branding for Extension products.

5. Enhance Customer Service

The College Relations and Communications Office is both a professional and service unit for the college. As such, it is important we earn the respect and confidence of our customers by providing effective, quality products and outstanding and respectful service. We must:

- Foster a positive, “can do” attitude among office staff.
- Ensure customers are treated with respect, recognition, and appreciation.
- Ensure constant and consistent quality improvement.
- Ensure staff understand and can consistently and clearly communicate office policies, criteria, products, and strategies.
- Better define and communicate for clients points of contacts for specific products.
- Simplify and streamline online product/service request processes and make transparent status and project management (one-stop shopping) to better respect client’s time.

Mission

Simplified Mission: **Connect, Collaborate, Communicate**

The mission of the College Relations Office is to communicate and promote the mission, programs, and impacts of the Penn State College of Agricultural Sciences and to develop and foster mutually beneficial relationships by providing a recognized linkage between the college and stakeholders.

Core Values

We are commitment to:

- The college and its mission.
- The needs of college stakeholder groups.
- Excellence and professionalism in all interactions and activities of the office.
- The highest standards of quality and customer service.
- Quality outreach programs and opportunities that enhance the visibility and reputation of the college, the departments, and the faculty.
- Employees’ personal and professional growth and a work environment that is friendly, respectful, and enjoyable.

Vision

The College Relations and Communications Office will be:

- A relevant, effective, innovative, and professional office that has earned the respect and trust of its clients.
- Focused on the strategic priorities of the college and will be integrated within the unit and the college.
- An external voice of the college and an internal connection point for college stakeholders - creating informed, supportive, and engaged stakeholders.
- Progressive, customer focused, and committed to continuous quality improvement and professional development.
- A model organization for our peer groups.

College Relations and Communications Office Area Summaries:

College Relations Area

The college relations area serves a public relations role with a mission to build and maintain relationships with three main external audiences--- alumni, industry, and legislators--- that lead to support for the college that is expressed in numerous ways. It is understood that sustaining the college will be, in part, dependent upon sustaining relationships, and, as articulated at a recent college retreat, effective “relationships take place over time, not at a point in time.” Sustaining relationships requires having a well-defined system of organizing, monitoring, measuring, and maintaining these relationships with clearly defined objectives, responsibilities, and accountability along with measurable benchmarks to gauge success.

College alumni are served through the College of Agricultural Sciences Alumni Society, which has approximately 8,000 members. The association has a full-time executive director that works with the association’s board of directors to create a comprehensive work plan to achieve the association’s mission. Currently the association has 10 affiliate groups within the 12 academic units in the college and sponsors numerous events and awards throughout the year.

Legislative advocacy is directed at promoting the college and its mission with government officials and agencies and gaining expressed support of that mission through adequate funding. This effort utilizes all external audiences to reinforce the college’s message to the legislatures.

The college relations area is also responsible for college-level industry/stakeholder relations. These relationships are built and maintained on a number of fronts with an emphasis on enhancing communications between the college and stakeholders by providing stakeholder opportunities to:

- Learn more about College of Agricultural Sciences programs, activities, and opportunities.
- Network with college leadership, faculty, and other industry leaders.
- Provide quality feedback on college programs and research.

- Relay suggestions for innovative ways in which the college can carry out its mission.
- Convey industry needs and concerns.
- Advocate and build external support for college programs, research and funding.
- Interact with college students through internships, co-ops, College Career Days, recruitment services, mentoring programs, etc.

(See Appendix B for a full listing of College Relations responsibilities)

Office of Conferences and Short Courses

The Office of Conferences and Short Courses (OCSC) is a fee for service unit that assists college units and faculty in facilitating and administering high quality outreach programs for college stakeholders. The office provides professional administrative, logistical, instructional, and marketing support to units and faculty sponsoring college outreach programs; provides client and speaker management services; helps identify and develop new, strategic outreach opportunities in the college; and uses outreach programs to increase the visibility of and support for the college.

Web Services Area

The Web Services area provides consultation and Web-based tools to the college, including Website content organization and management in the college content management system (CMS); architecture and navigation development; technical design; compliance with Penn State Web policies, accessibility, and other standards - with an emphasis on on-line branding and marketing goals; search engine optimization; implementation of emerging technologies; policies and best practices; and benchmarking using Web analytics tools. The area's main Web platform is the Plone CMS, which is a dynamic open-source application that has a large support base throughout Penn State's campus. Plone's feature set is very rich and is easily extensible for future enhancements to meet the growing needs of Web technologies.

This area provides the tools, training, and support to allow non-technical faculty and staff to maintain their own Web sites. The CMS empowers college units to "own" their respective Web sites, which allows the Web team to focus on providing enhancements and new functionality. The Web Services area also provides videography services for recording of presentations and educational pieces, which are converted into Flash format for easy Web deployment. The area also represents the interests of the college and serves as a liaison on various communication and college/University committees.

The Publications and Exhibits Area

The publications and exhibits area integrates professional-level writing, editing, photography, and design in support of college student recruitment and retention, marketing, research, extension, and education.

College priorities focus on student recruitment and on strengthening the image of the college through high-quality publications, exhibits, and events. This area has built on the University's "It's Your Time"

marketing campaign to create an improved package of print and exhibit products. This effort is reflected in the hundreds of products, including brochures, flyers, postcards, banners, advertisements, and events, that all revolve around a common theme to help the college develop an identity that is easily recognizable, while maintaining the Penn State brand.

Penn State Agriculture magazine illustrates the publication area's integration with the college relations, news, photography, marketing, and Web areas within College Relations and Communications Office. The magazine is an important tool with a circulation of over 40,000 copies that provides many of our stakeholders with the latest information and news about research, education, extension, development, and alumni.

The publications area produces hundreds of new and revised extension publications annually. More than one million publications are distributed throughout the Commonwealth each year, and most college publications are available to the public on the college's publications Web site.

The area's continued support of Ag Progress Days and Farm Show events serves to showcase the college to the public and provides for important connections with our stakeholders through exhibits and presentations of current research, extension information, and student recruitment. Concept through production for these events requires contributions from all media within Ag Communications. Introduction of 3-D design and presentation software, integration of marketing concepts, and use of reusable structures are a few examples of advancements in event design and production.

News Area

The news area performs media relations for the college including distribution of press releases, responding to media requests for information, and arranging interviews for college faculty/staff as expert sources as needed. The area produces articles and publications that are distributed via hard copy and online to raise awareness of, and build support for, college programs, with an eye toward influencing potential students, donors, legislators, funding agencies, industry stakeholders and others. Examples of the area's writing and editing work include news releases highlighting the college's research, extension and teaching programs; *Penn State Agriculture* magazine (bi-annual); the college's monthly newsletter; *Science for Your Life*, the college's bi-annual student news and recruiting tabloid; and other special communication projects. The area also writes, edits, and produces the Penn State Ag Sciences Radio Newslines, a weekly radio news feed.

The area also provides extensive communications and publicity support for the college's Ag Progress Days including advertising, news releases, media interviews, on-site public address announcements, and on-site media assistance during the event. In support of Farm Show, the area also coordinates the Farm Show Radio Committee, which produces live and pre-recorded radio feeds covering Farm Show activities utilized by more than 80 radio stations in four states.

Shared Services

College marketing and brand management are value-added services of all areas included in the College Relations and Communications Office. As communication initiatives for target audiences are developed, consistency of quality, message, and brand are addressed – in all mediums and at all levels.

Photography is also a value-added component of projects. Our photographer is assigned by our staff on an as needed basis and will work with clients to develop the most effective and efficient visual solutions.

Limited videography services are available to the college to record events and presentations that can be distributed in DVD or via Web services. These videos are used to promote our research areas, attract new students, and/or for educational purposes.

Progress Made in the 2005 - 2008 Planning Cycle

Significant progress has been made in meeting the goals of the 2005 – 2008 College Relations and Communications Office strategic plan. Highlights of our accomplishments are listed below by areas of responsibility:

Progress – Ag Communications

- Developed and implemented the college Communications and Marketing Study Group Report, which in part has resulted in rising enrollment rates for the past three years, including:
 - Hired a marketing specialist housed in the College Relations Office.
 - Established a Communication and Marketing Advisory Committee.
 - Worked with college and University partners, developed and implemented a recruitment marketing campaign that repositions the college to include a college Viewbook, brochures, future student microsite, future student videos, majors Web pages, majors one-pager print pieces, exhibits, ads, graphics, new college web site, high quality photos, etc.
- Restructured the Ag Communications Unit into the College Relations Office to better align with target audiences.
- Produced *Science for Your Life*, student tabloid.
- Developed new graduate recruitment materials.
- Produced high quality marketing postcards for Conferences and Short Courses.
- Developed *AgriImpact* one-pagers to demonstrate impacts of college programs.
- Developed bioenergy exhibit that has been used in numerous venues, including APD, Farm Show, Pittsburgh Energy Expo, USDA DC exhibit, and elsewhere to increased exposure and recognition of the college bioenergy program.
- Developed ENRI environmental exhibit that has been used at Farm Show, APD, Ag and Environment Conference, College Capitol Day, etc. to increase exposure and recognition of the college's environmental programs.
- Published college news and information site on Penn State Live Web site.

- Began podcasting initiative and recycling radio news feeds into podcasts.
- Revamped the college newsletter.
- Migrated all digital images into new, sustainable and restorable photo archive.
- Created process for in-house, high quality recruitment photography.
- Provided support for college Webinar efforts.

Progress – Web

- Repositioned office as central source for Web expertise in the college.
- Formalized documentation of projects and tasks.
- Entered WebLion/Plone partnership.
- Formalized Plone end-user training.
- Offered video conversion and presentation with Flash.
- Worked with live.psu.edu for news release logistics.
- Implemented Web standards, consistent branding, and emerging technologies on college Web sites.
- Improved Web communications within college and is playing a leadership role at the University level.
- Launched and/or redesigned 27 college Web sites.
- Provided focused videography and photography support.
- Implemented College Relations SharePoint collaboration and project management tools.
- Implemented new technologies including Adobe Flash, RSS Feeds, online project intake forms, Link Checker, Google Analytics, Google Page Rank, AgSphere, Nagios, Plone, Twitter and Event Web Cams.
- Increased search rankings of college Web site.

Progress – Stakeholder Relations

- Expanded partnerships through diversification of Penn State Ag Council membership (Examples: Chesapeake Bay Foundation, Pa Women in Ag, Pa Certified Organic, Bioenergy, Fair Share partnership), new advocacy around Rockview land purchase, and partnership with Penn State Alumni Association in reaching out to all alumni in support of the College on botanical garden receptions.
- Developed and implemented a Penn State Ag Council formal stakeholder input process into the college strategic planning process, involving the University Office of Planning and Assessment.
- Implemented College Capitol Day in Harrisburg where college stakeholders visit all 253 state legislative offices in support of ag research and extension funding.
- Developed improved marketing pieces to communicate college programs and impacts to stakeholders.
- Improved Penn State Ag Council College Research Tour and changed the date to September resulting in record attendance and excellent reviews.
- Increased college Alumni Society scholarships.
- Served as point of contact for Attorney General office on Act 38 cases and process new requests, improving science-based policies.

- Organized legislative tours for Congressman Holden, Senator Casey, Presidential Candidate Obama, USDA, and other legislative offices.
- Organized federal legislative aide's tour in conjunction with APD, which takes place every other year.
- Expanded the Ag Action Network and engaged them in the Rockview land transfer effort.
- Organized a wine industry and mushroom industry summit with college leadership.
- Organized industry and alumni to attend undergraduate student tailgates.
- Assisted in development of two new alumni program groups.
- Developed and implemented an alumni college enrollment initiative for student recruitment and retention.
- Achieved significant increases in student participation in graduation brunches.
- Hosted AgLive auction that brought in \$17,000 towards college scholarships.
- Created new college alumni and industry websites.
- Organized Michigan State football game alumni bus to Michigan

Progress – Continuing Education and Outreach

- Restructured the Office of Conference and Short Courses (OCSC) to increase efficiency and provide higher quality service to a greater number of clients to reflect the high quality of programs delivered by the college.
- Developed and implemented a new, transparent fee structure to increase revenues.
- Implemented an online registration system, CVENT, which has increased the efficiency and raised the professionalism of the office, and created a consistent, branded image for all programs offered by the College Relations and Communications Office.
- Increased revenues to OCSC and to clients both by over 100% from 2007 to 2008.
- Increased number of programs offered by OCSC by 50%.
- Increased number of registrants of programs offered by OCSC by 50% from 2007 to 2008 to over 9000.
- Developed high quality marketing postcards for college conferences to improve quality and consistent branding of the office that is in line with the overall college marketing strategy.
- Used programs offered by the OCSC to build partnerships and relationships between the college, industry, and government agencies, including EPA, DEP, PDA, Sudan, NRCS and to showcase college expertise in strategic priority areas like bioenergy and water quality.
- Purchased Harris Selectory to increase marketing reach.

(See Appendix C for the Office of Conferences and Short Courses 2008 annual report)

College Relations and Communications Office Goals and Strategies for 2009 – 2013

The College Relations and Communications Office focused on three goals in the 2008 – 2013 College of Agricultural Sciences strategic plan that we feel are most relevant to our office. We developed College Relations and Communications Office goals and strategies under each of these three college goals. We then developed area level strategies and action items under each of College Relations and Communications Office goals and strategies.

Following in chart form is the College Relations and Communications Office goals, strategies, and action items listed in relation to the college goals they are addressing. This is a working document and action items are assigned to specific areas within the College Relations and Communications Office. We will be monitoring progress at all times and documenting accomplishments. Assessment metrics are listed at the end of the chart and will be adjusted as needed.

College Goals	CR Goals	CR Strategies	Area Level Strategies	Area Level Action Items	Area
Increase Enrollment and Enhance Student Success	Enhance awareness of college program relevance in an effort to increase recruitment and retention of a high-quality and diverse pool of students	Enhance college marketing efforts targeted at future students to continue to reposition the college and increase awareness of program relevance	Increase the consistency, quality, and distribution of student recruitment products and initiatives	Assess and develop new recruitment marketing campaigns and materials (including videos) and advise college recruiters on most effective products to market majors. Increase number of high quality recruitment images	Pubs Web
				Create social networking groups for students to interact with the college around various initiatives	Web All
				Evaluate doing recruitment advertising on Google, Face Book, and You Tube and other social networking opportunities	Web
				Produce Science for Your Life tabloid and continue to seek/solicit stories of interest to prospective students and their families. Establish a tabloid "blog" site to post stories, photos and potential multimedia and interactive content	News
				Include recruitment material in OCSC registration packets	OCSC
				Work with undergraduate (UE) to use CVENT for student recruitment events and to survey students to collect info about prospective students interests	OCSC
				Administer and promote youth conferences	OCSC
				Envirothon, Ag in the Classroom, Conservation Leadership School, 4-H, FFA and others. Promote youth conferences to school districts and at other youth programs	OCSC

College Goals	CR Goals	CR Strategies	Area Level Strategies	Area Level Action Items	Area
Increase Enrollment and Enhance Student Success	Enhance awareness of college program relevance in an effort to increase recruitment and retention of a high-quality and diverse pool of students	Enhance college marketing efforts targeted at future students to continue to reposition the college and increase awareness of program relevance	Assess and enhance recruitment efforts at Farm Show and APD	Complete strategic assessment on college/units expectations and desired outcomes from college exhibits at Farm Show and APD and develop cost-effective methods to accomplish them	CR All
		Engage stakeholder groups in student support activities	Work with stakeholders to increase the number of career and internship opportunities for students	Partner with UE on career and internship opportunities including Career Day, Dean's Tours, industry involvement, database, and a template to help companies develop internships.	CR
				Work with UE to provide student training on expectations of employers (behavior, resume, dress code, interview skills) perhaps in conjunction with career day. Use industry stakeholders	CR
			Administer and/or promote events where alumni, industry and other stakeholder groups can interact with students	Promote and facilitate stakeholder participation in College Career Day, UE tailgates, Alumni tailgate, and student mentoring programs. Add prospective students and families to reception invitation list for Dean's tours receptions	CR
				Promote/ facilitate stakeholder involvement in college continuing ed programs. Encourage students to participate in the networking events when possible	OCSC

College Goals	CR Goals	CR Strategies	Area Level Strategies	Area Level Action Items	Area
Increase Enrollment and Enhance Student Success	Enhance awareness of college program relevance in an effort to increase recruitment and retention of a high-quality and diverse pool of students	Engage stakeholder groups in student support activities	Engage students in conference and short course activities	Build conference budgets to support student involvement when possible by providing limited access at reduced or no charge	OCSC
		Enhance efforts to recruit a diverse pool of continuing education students	Increase the number, quality, and relevance of conferences and short courses	Increase the professionalism of OCSC services offered to enhance the attendee experience and continue to improve quality and standards for registration materials and program delivery. Collect and provide feedback for evaluation improvement of program delivery	OCSC
			Improve marketing of programs and opportunities	Explore additional marketing list sources for purchase. Use faculty contacts to develop new lists through industry and department lists Use CVENT survey tool to collect demographic info to help target groups for marketing efforts	OCSC
				Market OCSC programs on industry websites and broaden Web advertising. Include program and registration information in academic unit and APG newsletters	OCSC
				Create a comprehensive targeted list for registrants on credit or online courses that are related to the program they are attending	OCSC

College Goals	CR Goals	CR Strategies	Area Level Strategies	Area Level Action Items	Area		
Strengthen Meaningful Communications and Mutual Education with Current and New Stakeholders	Build/strengthen mutually beneficial relationships with key stakeholder groups	Identify and target strategic college stakeholders in order to develop mutually beneficial relationships	Build relationships with non-traditional stakeholder groups and provide opportunities for engagement	Assess current PSAC membership groups to identify gaps and survey unit leaders for names of non-traditional stakeholder groups to target for PSAC membership	CR		
				Target and engage entire alumni population, not just members	CR		
				Provide an assortment of opportunities/events for stakeholder interaction to address non-traditional stakeholders			
				Provide leadership and administrative services and support to the Penn State Ag Council	Develop SharePoint site or Wiki for board members including orientation materials, agendas, committees, documents, work plans, etc. to improve planning and administration of board meetings, committee meetings and events	CR	
					Improve technologies for membership dues notices, managing membership list, and managing finances	CR	
					Enhance PSAC online communications and marketing pieces and interactive communications	CR	
					Enhance contact information and tracking of stakeholder involvement with the college	Evaluate and make recommendation on purchase of CRM system. Develop procedures for the collection and use of information and database management	CR Web OCSC
						Use post event surveys to collect more targeted info from conference and event attendees	OCSC CR

College Goals	CR Goals	CR Strategies	Area Level Strategies	Area Level Action Items	Area	
Strengthen Meaningful Communications and Mutual Education with Current and New Stakeholders	Build/strengthen mutually beneficial relationships with key stakeholder groups	Enhance opportunities for interactions between college leadership and stakeholders	Facilitate and provide opportunities for college stakeholders to access the college and have input into the planning and implementation of college programs	Develop and administer a PSAC college strategic planning committee. Administer stakeholder focus group input sessions and conduct stakeholder surveys to provide input into the college plan	CR	
				Working with the PSAC, assist with creation of advisory groups for units		
				Provide for opportunities for college leadership to update stakeholders on college planning process and implementation	CR	
				Plan events where college leadership and stakeholders can interact	Plan and administer two PSAC programs yearly with a college update, a college unit leader/PSAC luncheon annual	CR
					Working with PSAC and CAAS, plan and administer Dean's Industry Tours in conjunction with Alumni receptions for the new dean	CR
					Plan and administer college leadership/industry meetings with key stakeholder groups including Farm Bureau, PennAg, PA Forest Products Assoc. and others as needed	CR
					Encourage Deans' participation in college conference events, welcomes, receptions, dinners, etc and encourage college faculty and staff participation on conference planning committees	OCSC

College Goals	CR Goals	CR Strategies	Area Level Strategies	Area Level Action Items	Area
Strengthen Meaningful Communications and Mutual Education with Current and New Stakeholders	Build/strengthen mutually beneficial relationships with key stakeholder groups	Enhance opportunities for interactions between college leadership and stakeholders	Establish and build on existing partnerships with government agencies	Plan college leadership meetings with key state agencies including DEP, DCNR, and PDA at least annually. Develop process within college and administer Act 38 cases with Attorney General's office. Invite govt agency folks to college events	CR
				Evaluate college programs for relevancy to government priorities. Encourage collaboration with legislative offices and government agencies, in part through high level, strategic college conferences	CR OCSC
		Serve as liaison and advocate between the college and stakeholders	Represent the college at stakeholders' meetings and interactions	Attend industry meetings and conferences. Include info on the college and OCSC in welcome at college conferences	CR OCSC
		Engage stakeholder groups in development efforts for the college	Work with stakeholder groups to develop and implement development opportunities	Incorporate alumni and development into the college magazine and newsletter. Increase alumni society endowments Use magazine to solicit alumni membership and to promote high level OCSC conferences	CR OCSC
				Include contact info on Web for companies interested in research investments or giving	CR
				Hold monthly meetings with development to include Football, Parking permits, Alumni receptions, involving donors in capitol day and the ag action network and to assist with connections/visibility with stakeholders	CR

College Goals	CR Goals	CR Strategies	Area Level Strategies	Area Level Action Items	Area
Strengthen Meaningful Communications and Mutual Education with Current and New Stakeholders	Build/strengthen mutually beneficial relationships with key stakeholder groups	Strengthen Meaningful Communications and Mutual Education with Current and New Stakeholders	Build/strengthen mutually beneficial relationships with key stakeholder groups	Maintain Ag Action Network database and increase membership and engagement of the Network. Work with extension/research centers to build database. Consider adding students	CR
			Enhance, organize, and administer advocacy groups and efforts	Consider hosting Capitol Day for students with Ag advocates and council, Student organizations, Farm Bureau, and Faculty	CR
				Develop budget communication pieces to communicate college needs, relevancy and impacts to include college overview pieces, one-pagers and legislative newsletter	CR Pubs
				Host college legislative seminars on relevant topics in the Capitol	CR
		Recognize and thank college partners	Develop and administer methods to recognize friends of the college	Strategically evaluate and administer criteria and invitations to college football events and Ag Arena Parking Permits	CR
				Present PSAC and alumni awards and increase status, criteria, quality, and diversity of nominations through improved processes and communications with the AU, faculty, extension and industry	CR
				Submit nomination for "Friend of Penn State" legislative award	CR
	Inform stakeholders, including the general public, to enhance ownership, satisfaction and support of college programs	Enhance quality, relevancy, and distribution and measure effectiveness of communication initiatives for all target audiences	Continue to evaluate and improve quality and creativity of college marketing pieces	Enhance use and quality of online communication methods such as webinars, blogs, podcasts, etc. Build Web-based photo stories for Penn State Live and college sites	Web All

College Goals	CR Goals	CR Strategies	Area Level Strategies	Area Level Action Items	Area
Strengthen Meaningful Communications and Mutual Education with Current and New Stakeholders	Inform stakeholders, including the general public, to enhance ownership, satisfaction and support of college programs	Enhance quality, relevancy, and distribution and measure effectiveness of communication initiatives for all target audiences	Continue to evaluate and improve quality and creativity of college marketing pieces	Set up annual review meetings with University Marketing and Advertising and University Publications to review all college marketing pieces and campaigns	Pubs All
			Improve the college's dissemination of research results (Reporting)	Explore Web-based methods of distributing abstracts and research presentations. Streamline method to document permission to publish abstracts and presentations from researchers/presenters	OCSC Web
			Enhance public recognition and reporting of college programming's impact (Marketing)	Track industry satisfaction through company repeat participation in programs. Use post event surveys and evaluations to document impacts	OCSC
				Plan, administer, and grow the PSAC college research tour annually. Solicit research topics to include from unit leaders	CR
				Seek information and ideas from centers and institutes, unit leaders, and faculty, as well as from extension program leaders, work groups and program teams. Meet with new faculty on each beat as they are hired	News CR
			Evaluate and diversify distribution of communication and marketing pieces for all target audiences	Enhance search engine optimization on college Web site. Tag Web articles for relevant content	Web News

College Goals	CR Goals	CR Strategies	Area Level Strategies	Area Level Action Items	Area
Strengthen Meaningful Communications and Mutual Education with Current and New Stakeholders	Inform stakeholders, including the general public, to enhance ownership, satisfaction and support of college programs	Enhance quality, relevancy, and distribution and measure effectiveness of communication initiatives for all target audiences	Evaluate and diversify distribution of communication and marketing pieces for all target audiences	Explore the potential for social networking sites (Facebook, Linked In, etc.) to support media relations and enhance direct communications with prospective students, stakeholders and others	Web All
				Build or maintain personal relationships with key media outlets in Pennsylvania. Continue to fine tune and add to, media e-mail lists. Survey media recipients to update and ensure accuracy of lists	News
				Better utilize college departments and Extension to distribute info on college programs	Pubs All
				Implement redesigned news Web site, adding "College in the News" page, photo galleries, etc. Continue to work with Public Information to refine the partnership/interface with Penn State Live	News Web
				Seek ways to improve efficiency in magazine list management and distribution. Explore redesign of magazine Web site as a "blog" site, where additional photos, reader comments and other value-added material can be offered.	News Web
				Use survey and Web analytics to measure impact of our radio efforts. Establish a standing radio news student intern position to assist with production of weekly material	News

College Goals	CR Goals	CR Strategies	Area Level Strategies	Area Level Action Items	Area	
Strengthen Meaningful Communications and Mutual Education with Current and New Stakeholders	Inform stakeholders, including the general public, to enhance ownership, satisfaction and support of college programs	Enhance quality, relevancy, and distribution and measure effectiveness of communication initiatives for all target audiences	Evaluate and diversify distribution of communication and marketing pieces for all target audiences	Complete transition of exhibits loan pool for easy customer use and improved accountability of materials.	Pubs	
			Strategically evaluate all College publications and relevancy	Explore the desirability and value of continuing college newsletter. Consider the elimination of the paper version as a cost-cutting measure	News	
			Implement methods to track and measure effectiveness of marketing initiatives	Monitor and improve the placement of the college's content in search engines	Web	
				Include info in registration and post event survey on how conference registrants heard about the program and where they seek continuing ed opportunities. Customize email forwarding text to for target audience	OCSC	
				Track effectiveness of various purchased marketing lists and email forwarding	OCSC	
			Expand the college's contribution to agricultural literacy initiatives	Provide multiple perspectives on issues associated with the food system to enable consumers to make informed decisions	Identify timely topics/content of interest to the general public for communication pieces and broadly distribute	OCSC
					Utilize Blogs and other social networks to create dialogue around hot topics in Ag (BloggerHeads)	News All

College Goals	CR Goals	CR Strategies	Area Level Strategies	Area Level Action Items	Area
Strengthen Meaningful Communications and Mutual Education with Current and New Stakeholders	Inform stakeholders, including the general public, to enhance ownership, satisfaction and support of college programs	Expand the college's contribution to agricultural literacy initiatives	Administer Farm Show and APD college themes and exhibits	Complete strategic assessment on college/units expectations and desired outcomes from college exhibits at Farm Show and APD and develop cost-effective methods to accomplish them	Pubs All
			Increase awareness about educational programs that contribute to ag literacy	Add links to general ag info to registration sites and distribute industry pubs at registration. Include virtual tours to showcase food production and processes	OCSC
Lead and Manage the College as a System	Enhance reallocation of resources toward strategic priorities	Evaluate and prioritize office products and services to focus resources on college priorities and for highest ROI	Focus products and quality delivery within a set of clearly defined and broadly communicated limits and strategic priorities	Working with CMAC and other advisory groups, define a vision and plan for college communications to include defining priority audiences, products, and desired outcomes from marketing initiatives	All
				Create communication "packages," suite of services, and criteria for products to offer clients	Pubs All
			Work with Extension to strategically evaluate and prioritize publications	Work within the new Extension reframing process to collaborate with working groups to define strategies and priorities for extension communication pieces	Pubs All
			Identify and prioritize content, target audiences, and communication methods based on strategic priorities and desired outcomes	Create Ag Comm leadership team to evaluate and prioritize day to day communication needs and requests and develop innovative communication initiatives with input from advisory groups	All
				Continue to evaluate OCSC portfolio for strategic relevance and opportunities	OCSC

College Goals	CR Goals	CR Strategies	Area Level Strategies	Area Level Action Items	Area
Lead and Manage the College as a System	Enhance streamlining of administrative processes to achieve time and cost savings	Enhance efficiency, productivity, and service	Evaluate and enhance production processes	Explore move from hard copy publications to online publications. Explore possibilities with NPC. Evaluate print-on-demand options	Web All
				Train staff on design software to reduce work load on Publications	Pubs OCSC
				Work with college units to assess annual communication needs and develop comprehensive production schedules to coordinate printing of recruitment materials to take advantage of volume cost savings	Pubs All
				Schedule and cost share multi-day photo shoots for clients	Pubs OCSC
				Evaluate and make recommendations on outsourcing options. Increase use of stock photos as appropriate	Pubs All
				Develop comprehensive timelines and training documents for all programs. Maintain planning contacts database and written agreements for fees and services. Provide cross training for staff	OCSC
				Work with PDC to help customers develop clear distribution plans and produce appropriate quantities of publications	Pubs
				Work with PDC to improve strategies to provide timely publication reprints	
				Implement cost-recovery structures as appropriate.	CR OCSC

College Goals	CR Goals	CR Strategies	Area Level Strategies	Area Level Action Items	Area
Lead and Manage the College as a System	Enhance streamlining of administrative processes to achieve time and cost savings	Enhance efficiency, productivity, and service	Maximize appropriate technology usage to increase efficiency	Continue to develop SharePoint project management strategies. Standardize software versions across unit. Explore best practices training for current technologies	Web
				Improve data management of contact lists in CVENT. Develop budget query tool for OCSC	OCSC
				Implement Photo and Video Web repository application. Improve photo and pubs archives for efficient access and complete back up of all materials. Evaluate Penn State still life application	Web Pubs
				Evaluate and implement emerging technologies including technologies for translation of content between media.	Web
				Implement automated FTP server for moving documents between internal /external parties. Evaluate Google Docs	Web
				Evaluate auto notification and expiration of Web content. Implement RSS feeds	Web News
				Host brainstorming sessions around specific technologies to develop meaningful strategies to utilize them to accomplish college goals	All
				Explore electronic abstract collection and web posting options	Web OCSC
				Review financial policies in office for cost saving opportunities	Encourage staff to do a personal assessment of stewardship of college resources (spending, facilities, equipment, etc.)

College Goals	CR Goals	CR Strategies	Area Level Strategies	Area Level Action Items	Area
Lead and Manage the College as a System	Enhance streamlining of administrative processes to achieve time and cost savings	Enhance efficiency, productivity, and service	Maximize appropriate technology usage to increase efficiency	Evaluate all event's, services, and products budget costs and recovery options (donations APD).	All
				Examine opportunities to partner to leverage resources and reduce duplication of spending, supplies, and shipping costs. New copier	All
				Meet with Dean around CR office budget to document allocation and reductions	CR
				Create online project request forms and project tracking and utilize web photo galleries linked to SharePoint for client review	All
			Enhance customer service practices	Cooperate and coordinate client needs and resources across CR areas and college units	All
				Provide guidelines that maintain college brand and standards for clients that outsource publications	Pubs
				Shorten the budget close out process on Conferences and create unique urls for appropriate websites and conferences	OCSC
	Increase college-wide support, collaboration, and participation in stakeholder relations and college communications	Engage the entire college in stakeholder relations and communications in order to broaden and enhance impacts	Communicate to the college the need, strategy, opportunities and expectations regarding stakeholder relations and communications to increase collaboration, input, and support	Attend Extension in-service conferences , unit leaders meetings, and faculty meetings and give CR & Comm. updates	All

College Goals	CR Goals	CR Strategies	Area Level Strategies	Area Level Action Items	Area
Lead and Manage the College as a System	Increase college-wide support, collaboration, and participation in stakeholder relations and college communications	Engage the entire college in stakeholder relations and communications in order to broaden and enhance impacts	Communicate to the college the need, strategy, opportunities and expectations regarding stakeholder relations and communications to increase collaboration, input, and support	Create college-wide College Relations and Communications e-newsletter to keep faculty and staff informed. Use the CMAC, unit leaders meetings, and other designated groups as advisory groups for CR/Comm efforts	All
				Work more closely with faculty and extension to communicate legislative processes/ protocols to maximize impacts. Set up county advisory legislative board. Speak at in-service days. Provide college-level training on legislative advocacy and faculty media training	CR
				Collaborate with other college units to develop methods and buy-in to better utilize current data bases throughout the college	All
			Enhance quality standards and consistency across the college through broader participation in college branding efforts	Create and communicate policies, guides, templates, and best practices for communication/branding efforts including expanding the use of CVENT. ID and implement a college-wide calendar system on the Web	All
		Enhance employee engagement within the unit	Ensure professional development opportunities	Engage in team building activities. Provide wellness opportunities	All
				Network with other Penn State peer professionals. Seek professional training where appropriate	All

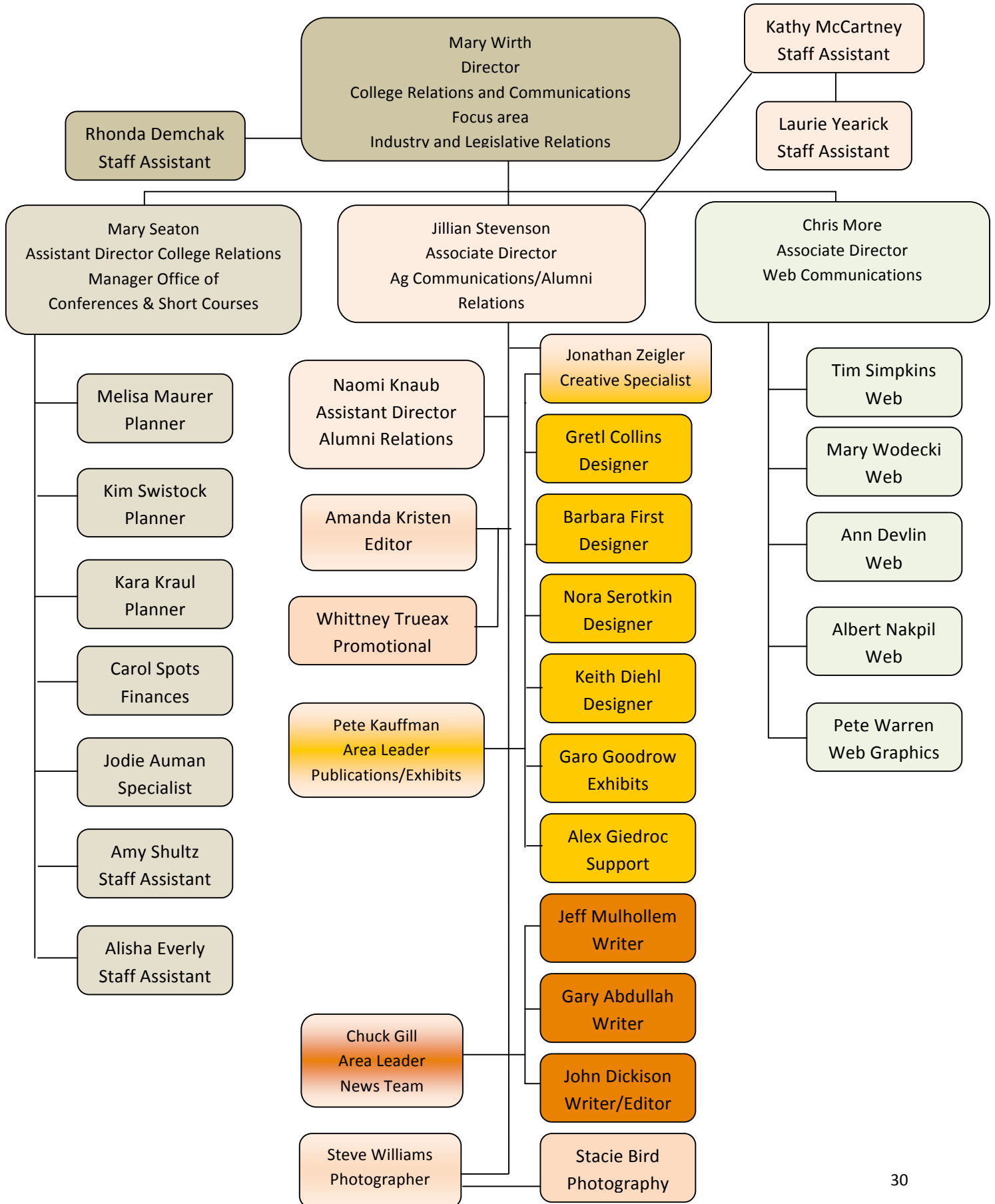
College Goals	CR Goals	CR Strategies	Area Level Strategies	Area Level Action Items	Area
Lead and Manage the College as a System	Increase college-wide support, collaboration, and participation in stakeholder relations and college communications	Enhance employee engagement within the unit	Implement systematic and meaning internal communications	Have each CR area host a “Day in my Shoes” brownbag lunch annually to update other areas. Have each of the three major areas host an office-wide social event annually	All
			Implement systematic and meaning internal communications	Hold CR director meetings with all staff quarterly for updates. Have a full day staff retreat annually	CR
				Request all staff subscribe to college news wire	All
			Reduce the environmental footprint of the unit	Conduct energy audit of the office. Promote Reduce, reuse, and recycle. Maximize electronic communications and distribution over print	All
				Use energy saving checklists at conferences	OCSC

Assessment Recommendations:

- Increases in student enrollment
- Hits on key web pages
- Tracking results of advertisements
- Documented involvement and satisfaction surveys by our clients and stakeholders
- University public research survey on PSU academic excellence – Ag currently #4
- Media coverage
- Annual review/feedback from University Marketing on communication/marketing efforts
- Increased subscription numbers to college news wire
- Reduced costs

Appendix A:

College Relations and Communications Office Organizational Chart



COLLEGE OF AGRICULTURAL SCIENCES
College Relations and Communications Office
Alumni, Industry & Government Relations
Responsibilities 2009

Association Management (Requires administrative management for all events, meetings, etc.)

CAS Alumni Society
Armsby Honor Society
Penn State Ag Council
Ag Action Network
CARET (Meetings in Washington, DC in spring)
Direct Office of Conferences and Short Courses
Direct Communications and Marketing Units

Annual Events Management

Ag Council Legislative Research Tour (September)
Graduation Brunches (publicity, registration, organization—2/yr)
Ag Progress Days Alumni Day Luncheon (publicity, registration, organization)
Ag Progress Days Government/Industry Day Luncheon (publicity, agenda, registration, organization)
Ag Progress Days Legislative Dinner (August)
Ag Progress Days Federal Legislator tours – Full responsibility as of 2007 – Biannually
Ag Progress Days Renewable Energy Tents (PDA Partnership)
Alumni Awards Receptions, Lunches and Dinner (invitations, organization—3/yr)
Ag Alumni Tailgate (publicity, registration, organization)
Traditional Alumni Reunion Weekend College Open House/Tours
Ag Trustee Election
Ag Advocate Alumni Reunion (publicity, registration, organization)
Armsby Honor Society Reception, Dinner, Tours
Dean's Industry Tours and Receptions (5-8 per year)
Ag Action Network Training & Skybox Event (April, Blue & White Game)
College Capitol Day and Reception (March/April)
Penn State Village Alumni Gathering
Student Mentoring Program Kick-off and Closing Events

Administering & Coordinating Meetings

Ag Alumni Board—3/yr
Ag Alumni Annual Meeting
Ag Advocate Alumni Group Board—2/yr
Ag Alumni Society Committee Night—1/yr
Ag Alumni Society Executive Committee Planning Meetings—2/year
Ag Council Board—4/yr
Ag Council Delegates Meeting & programs—2/yr
Ag Council/Unit Leaders Luncheons – 1/yr
Attorney General Act 38 Administration

Various Committee Meetings throughout the year (approx. 25-30/yr between Ag Council & Ag Alumni Society)

College/PA Dept. of Ag Leadership meetings—2 - 3/yr

College/DCNR Leadership meetings— as needed

College/DEP Leadership meetings—as needed

College/PA Farm Bureau Leadership meetings—2/yr

College/PennAg Leadership meeting—1/yr

College/PA Forest Products Assoc. Leadership Meeting—1/yr

CVENT administration in College

Pa Department of Agriculture Harvest Tour participation

Various Legislative meetings/tours throughout year (Pres. Bush visit, Secretary Johanns Forum, USDA Liaisons, Senator Casey, Obama, misc. visits with state and federal legislators.)

Publishing & Distributing Materials

Connections (writing, manage publishing and distribution—2/yr)

Ag Advocate Alumni Group Newsletter (writing, manage publishing and distribution 1/yr)

Armsby Honor Society Newsletter (writing, manage publishing and distribution—1/yr)

Industry Newsletter (writing, on-line distribution—4/yr)

Ag Council Brochure (writing, manage publishing and distribution)

Alumni Society Brochure (writing, manage publishing and distribution)

Master Farmers Newsletter

Ag Council Membership Manual

Ag Council & Alumni Society Board Manuals

Mentoring Program Mentor and Protégé Manuals

Ag Action Network Training Manual

Various press releases on council and alumni activities

PA Impact pieces (content consultation, distribution)

Yellow Book College Budget Piece

State Budget Impact Piece

Federal Budget Impact Piece

State and Federal Budget Updates & Alerts to College, Alumni, and Support Groups

College Relations Office Strategic Plan

Managing Awards *(These include preparing the nomination materials and coordinating the campus visit with the academic units)*

Distinguished Alumni

Alumni Fellow

Alumni Achievement

Honorary Alumni

Philip Philip Mitchell

Outstanding Alumni

Outstanding Recent Alumni

Outstanding Senior and Student Awards

Excellence in Academic Advising Award

Alumni Association Awards for Programming
Student Internship Awards (publicity, coordinating selection, notifying those selected)
Penn State Ag Council Leadership Award
Penn State Ag Council Youth Leadership Award
Penn State Ag Council Leadership in Action Award
Penn State Alumni Assoc. Friend of Penn State Legislator Award (submit nomination)

Dean's Support/Special Projects

Serve on various college, university and national association committees (University Public Relations Council, College Strategic Planning Committee, Communication and Marketing Study Group, Data Assessment Study Group, Penn State Alumni Association Membership Committee, NAADA—National Agricultural Alumni and Development Association—Membership Committee, Various College/University Search Committees)
Special projects such as Land-Grant Campaign, Nutrient Mgmt. Summit, Michigan State Alumni Football events, Arboretum Receptions, Ag Energy Displays, Legislative Hearings (Farm Bill, Biosecurity), Longwood Gardens Alumni Event.
Facilitate and serve on College Communication and Marketing Advisory Committee
Work with Faculty on special projects (Example: ENRI Water Quality Conference)

Miscellaneous

Ag Alumni Pavilion (coordinate display for Ag Progress Days)
Ag Alumni Society Exhibit
Assist with legislative hearings as requested (Farm Bill, Bioenergy, etc.)
College Tours for Special Groups, Organizations and Guests
Penn State Ag Council Banners at APD (collect and display banners in Special Events Building)
College Football and Basketball Tickets Distribution
Football Skybox Event Invitations
Ag Arena Football Parking Permits—policy and distribution
Visitor Parking Passes—distribution
Leadership Development Program Visits in Washington
Legislative Directory Distribution to College and Counties
Maintenance of College Relations Office, Alumni, Ag Council and Business & Industry websites
Maintain various databases and list serves for College, including legislative advocacy and dean's tour database
Coordinate requests with Alumni Association from Academic units for alumni label selects
Student Mentoring Program (matching, programming and ongoing communication)

MFW:JHS/kam 3/3/2009



**Office of Conferences and Short Courses
2007-2008 Year End Report
Submitted to Dean Robert Steele
September 2008**

Office of Conferences and Short Courses 2007-2008 Year End Report

Summary:

The Office of Conferences and Short Courses (OCSC) is a fee for service unit that assists college units and faculty in facilitating and administering high quality outreach programs for college stakeholders. The office provides professional administrative, logistical, instructional, and marketing support to units and faculty sponsoring college outreach programs; provides client and speaker management services; helps identify and develop new, strategic outreach opportunities in the college; and uses outreach programs to increase the visibility of and support for the college.

The OCSC was relocated into the College Relations Office in June of 2004 to enhance and benefit from relationships with external stakeholder groups fostered within the College Relations Office. Prior to its relocation in the College Relations Office, the OCSC was charged to implement a cost-recovery structure to support the OCSC and effectively develop financially solvent outreach programs. Although a specific financial cost-recovery goal or timeline was not defined, the OCSC has made great progress towards that end.

In August of 2006 the office underwent a change in management. Shortly thereafter the office implemented a new fee structure as well as an online registration and marketing system, CVENT, which has resulted in more professional, efficient and effective services and conferences and has increased the number of programs, registrants, and income collected.

Also undertaken was a review of the OCSC budget and financial reporting processes, as it became apparent current reporting methods were not providing transparent information regarding the financial performance of the office over time. The OCSC manages more than 60 independent program (conference) budgets, with approximately \$1.2 million in gross revenue, which, when aggregated with the operational budget for the office, has not provided a clear picture of the office's true financial performance. In short, a lack of ability to differentiate between programmatic income (the net conference income is ultimately paid to the client) and OCSC operational income (service fees charged to clients to cover overhead of the OCSC) has proven to be problematic over time. It was apparent there was a need to revise the financial reporting process in the office.

Towards this end, the director and manager have been meeting for several years with the college budget administrator in an attempt to reconcile past and current programmatic budgets as well as the OCSC administrative budget in the University accounting system, IBIS, to clearly define the current fiscal status of the office. For the first time in the history of the office, the programmatic budgets and OCSC operational budget have been reconciled in IBIS. This was a complicated and time consuming process involving the manual compilation of data, which cannot be automated using the existing reporting tools.

This report summarizes the financial performance of the office through this transition, helps define realistic financial expectations of the office into the future, and identifies issues that need to be addressed.

Of particular importance are two major issues that need immediate attention to ensure the sustainability of the office:

- 1. Mutual agreement on defined, realistic cost-recovery goals and a recovery timeline, including defining an annual level of financial operational support from the college.**
- 2. Addressing historic budget deficits and financial reporting methods that obscured them.**

Respectfully submitted,

Mary Wirth, Director of College Relations

Mary Seaton, Manager, Office of Conferences and Short Courses

Financial Summary:

In August of 2006 the office underwent a change in management, which has resulted in an increase of the number of programs, registrants, and amount of income collected. The office implemented a new service fee structure as well as an online registration and marketing system, CVENT, which has resulted in a more professional, efficient and effective delivery of services and conferences. As a result, the office has improved significantly in all areas. Registration is at an all time high, as are collected OCSC service fees (cost recovery income for OCSC), and program income paid to the clients. The office continues to grow and has managed more programs in this fiscal year than at any other time.

In this year alone, the collected OCSC service fees and program income paid to the clients have more than doubled. After subtracting the total operating expenses for the office in FY 07/08, the programs made \$171,314.44 for the college at large.

Net Program Income

(Registration Fees minus expenses)

Unit Income (Returned to Clients)	\$303,708.05
Income to OCSC (Service Fees Retained)	\$213,277.54
	<hr/>
	\$516,985.59
Less OCSC Operating Expenses	\$345,671.15
	<hr/>
Net Return	\$171,314.44

Fiscal Year	2005/2006	2006/2007	2007/2008	% Increase
Total Income	\$761,899.31	\$ 876,704.32	\$1,234,408.74	41%
OCSC Service Fees (Cost Recovery Income)	\$135,128.06	\$103,170.00	\$213,277.54	107%
Income paid to clients (academic units)	\$126,595.00	\$143,008.72	\$303,708.05	112%
Total Registrants	5,224	6,030	9,136	51%
Number of Programs	32	41	61	50%

The increases can be attributed to a variety of initiatives. At the end of 2006, a new, standardized service fee structure was implemented, which has increased revenue for repeat, annual programs. The purchase of CVENT has increased efficiency and allowed the office to increase the number of programs delivered at different service levels. New marketing strategies have increased attendance, which in turn has increased registration income collected for many programs.

New clients and the resulting new program income collected in FY 07/08 (and projected in FY 08/09) has been a major contributor to the increases mentioned above. Most of this income comes from one time programs, although some of these new programs will repeat annually.

Total New Program Income	
New Program Income for 2007-2008	\$53,260.04
New Program Income for 2008-2009	\$81,075.00

A comparison between fees collected in FY 05/06 and projected fees for FY 08/09 demonstrate the effectiveness of the new fee structure. More information on the programs and the budget are included in the attached appendix. As the office continues to increase efficiency and improve processes, the portfolio of programs serviced will grow. There is a high demand for the services provided by the Office of Conferences and Short Courses, especially the use of CVENT only which is expected to be the largest growth opportunity for the office.

08-09 Repeat Programs	Per Person Fee	Base Fee	Total 08-09 Admin Fee	Total 05-06 Admin Fee
4-H Cap Days 09	3,000.00	1,500.00	4,500.00	1,400.00
4-H State Days 08	8,400.00		8,400.00	8,676.00
Ag in the Classroom 08	1,200.00	1,500.00	2,700.00	3,800.00
Bankers 09	2,000.00	2,100.00	4,100.00	3,420.00
Better Process 09	2,000.00	3,500.00	5,500.00	4,216.00
Biomass 09	1,750.00	3,500.00	5,250.00	NA
Bug Camp 08	225.00	300.00	525.00	732.76
CLS 08	800.00	1,500.00	2,300.00	3,766.00
Cultured Products 09	1,500.00	5,000.00	6,500.00	4,200.00
FFA 08	21,825.00		21,825.00	17,036.00
Forensic Ent 09	750.00	2,000.00	2,750.00	1,970.00
Ice Cream 101 09	1,500.00	5,000.00	6,500.00	5,305.00
Ice Cream Short 09	3,500.00	5,000.00	8,500.00	10,840.00
Mushroom 08	4,760.00	5,000.00	9,760.00	4,810.00
PA Envirothon 08	6,000.00	500.00	6,500.00	NA
Pamfes 09	5,000.00	5,000.00	10,000.00	5,950.00
Pasteurizers 08	2,000.00	5,000.00	7,000.00	3,090.00
Plant Phys 09	3,850.00	5,000.00	8,850.00	9,560.00
Professional Crop Producers 09	10,000.00	5,000.00	15,000.00	NA
Sanitation 08	2,000.00	5,000.00	7,000.00	NA

TOTALS **\$82,060.00** **\$61,400.00** **\$143,460.00** **\$88,771.76**

History:

While the office is improving and revenue is increasing, there are longstanding budgetary concerns that have not been resolved.

The following table shows a history of the office performance in several areas as well as a comparison across the years. It is important to recognize that until 2006, the office had a decreasing number of programs, a decreasing number of registrants, and therefore a decreasing amount of income, while expenses remained more consistent over time.

This trend culminates in a negative beginning balance in FY 06/07 for the office of (\$131,937.00) which reflects the inability of the office to sustain itself without a consistent level of funding from the college. The row labeled department shortfall, demonstrates the gap between what the office collected to offset costs, and what was required to cover the balance of operating costs. When the department shortfall exceeds the beginning balance (net expenses in the permanent budget) provided by the college, the program balance is eroded by that amount each year. In every year, the beginning balance is less than what is required to offset the expenses. This has resulted in a large program balance deficit over time.

Fiscal Year	2001/2002	2002/2003	2003/2004	2004/2005	2005/2006	2006/2007	2007/2008
Collected Income	1,128,870.00	1,145,134.00	1,144,012.00	892,018.00	761,899.31	876,704.32	1,234,408.74
Budgeted Income	(1,128,147.00)	(1,145,464.00)	(1,146,477.00)	(892,019.00)	(868,907.00)	(876,704.00)	(1,242,521.00)
Budgeted Expenses	1,173,294.00	1,139,279.00	1,171,854.00	982,724.00	903,776.00	599,512.00	1,186,216.00
Actual Expenses	<u>(1,177,528.00)</u>	<u>(1,007,123.23)</u>	<u>(1,025,533.15)</u>	<u>(863,592.82)</u>	<u>(928,705.69)</u>	<u>(788,369.50)</u>	<u>(1,053,637.40)</u>
Net Expenses (IBIS)	(3,511.00)	131,825.77	143,855.85	119,130.18	(131,937.38)	(188,857.18)	124,466.34
Beginning Balance (PB)	149,914.00	119,110.00	100,725.00	57,682.44	61,538.00	(131,937.00)	-
Collected Admin Fees	99,801.00	147,859.00	153,702.00	123,193.00	135,128.06	103,170.00	213,277.54
Net Income Units	<u>289,708.00</u>	<u>153,084.00</u>	<u>212,695.00</u>	<u>143,612.00</u>	<u>126,595.00</u>	<u>143,008.72</u>	<u>303,708.05</u>
Net Program Income	389,509.00	300,943.00	366,397.00	266,805.00	261,723.06	246,178.72	516,985.59
Salaries	278,736.89	260,816.00	239,064.07	255,561.10	268,640.03	258,101.74	277,174.58
Office Expenses	16,332.24	15,214.28	9,285.17	12,396.11	14,026.31	51,168.85	68,496.57
Program Losses		<u>18,174.82</u>	<u>18,174.82</u>	<u>1,129.46</u>	-	-	
Operating Expense	295,069.13	294,205.10	266,524.06	269,086.67	282,666.34	309,270.59	345,671.15
Net Program Income	389,509.00	300,943.00	366,397.00	266,805.00	261,723.06	246,178.72	516,985.59
Operating Expenses	<u>295,069.13</u>	<u>294,205.10</u>	<u>266,524.06</u>	<u>269,086.67</u>	<u>282,666.34</u>	<u>309,270.59</u>	<u>345,671.15</u>
Net Income to College	94,439.87	6,737.90	99,872.94	(2,281.67)	(20,943.28)	(63,091.87)	171,314.44
Admin fees	99,801.00	147,859.00	153,702.00	123,193.00	135,128.06	103,170.00	213,277.54
Operating Expenses	<u>295,069.13</u>	<u>294,205.10</u>	<u>266,524.06</u>	<u>255,561.10</u>	<u>268,640.03</u>	<u>309,270.59</u>	<u>345,671.15</u>
Department Shortfall	(195,268.13)	(146,346.10)	(112,822.06)	(132,368.10)	(133,511.97)	(206,100.59)	(132,393.61)

Conclusion:

The office has made significant progress and is moving in the right direction but has budgetary issues that need to be addressed. If the longstanding issues are not resolved, the program deficit could continue to grow and leave the office in an untenable position.

After an extensive review and evaluation of the financial system, four main areas of concern have been identified, which have prevented a clear understanding of the fiscal performance of the OCSC.

- **The required level of funding remains constant, while college funding level for the office varies.**
The level of support is determined by the permanent budget which does not provide a consistent level of funding for the office. In FY 07/08, the office received no funding from the college. This is likely due to the lack of transparency between the operational budget and the program budgets.
- **There has been no separate accounting of department activity and program activity.**

In FY 07/08, total collected administrative fees were \$213,277.54 and total operating expenses for the office were (\$345,671.15), resulting in a net loss of (\$132,393.61). However, due to the large amount of program income collected as registration fees and the success of programs in the office, the overall net expenses for the budget are \$124,466.34.

The office appears to make money because the programs are making money for the clients and some of that money remains in the budget across fiscal years.

- **The previous program balances are not preserved in the budget, but continue to be sent back to the units upon request.**

The estimated program balance in FY 06/07 was \$269,778.32. Of this amount, none was carried forward for return in FY 07/08. In FY 07/08, residual transfers to the units were \$303,708.05. This cycle of collection of money in one fiscal year and the transfer of residual in another, has further contributed to the erosion of program funds over the years. Accumulated program balances currently stand at \$324,931.48 at the close of FY 07/08. To make the budget whole, the program balances must be accounted for and preserved from year to year.

- **The office can only recover a portion of the operating costs.**

The office is reaching the maximum amount of income that can be collected from current programs with the resources available. If the goal is to recover a higher proportion of the costs, the program priorities will have to shift so that more profitable programs are supported by the office. Some programs will have to be discontinued so other programs can be added to increase the ability to recover cost with existing resources. The office needs guidance regarding what the priority of the office should be - maximizing income or providing services for strategic conferences.

Recommendations:

- **Clear cost recovery guidelines need to be established along with defined college funding levels.**

A consistent level of college funding is necessary. Fifty percent of total operating expenses to support the OCSC is requested to allow for annual increases in salary and expenses. For FY 08/09, projected operating expenses are \$358,000. (50% = \$179,000).

- **The OCSC should collect at least 50% of total expenses in administrative fees each year.**

Any excess can be used to pay down the current deficit in program budgets. For FY 08/09, the projection for total collected administrative fees is \$226,535, leaving a balance of \$47,535 to put toward the deficit. (Add the \$150,000 for FY 07/08 and that reduces the deficit by \$197,535). Once the deficit is gone, any balance will go to the college.

- **Fiscal procedures should be established to preserve the program balances and track the reduction of the accumulated deficit.**

If the office receives \$150,000 committed for 07/08 and \$179,000 recommended for 08/09, there will be a significant decrease in the program deficit.

Program Deficit 08-09	(324,931.48)
07-08 College Program Support	150,000.00
08-09 College Program Support	179,000.00
Projected Operating Expenses 08-09	(358,000.00)
Projected Admin Fees 08-09	224,535.00

- **Reports need to be created to accurately reflect the OCSC operational budget and financial performance, differentiating it from the programmatic budgets.**
Assistance from the college financial office will be needed to accomplish this goal.