ONE COLLEGE CONCEPT

Administrative Council
October 17, 1985

ONE COLLEGE CONCEPT

(1.0)   To ensure a basic equality of opportunity to all
          individuals receiving college services, a single
          college philosophy shall govern all aspects of
          institutional operations. This philosophy is that of
          one college guided by a single mission and set of goals
          and objectives. Each operating unit shall conduct its
          affairs and make decisions within this unified
          framework.

(2.0)   All resources of the college shall be put to their
          highest and best use without respect to geographic or
          jurisdictional factors. To this end, decisions shall
          transcend traditional limits and shall be made on the
          basis of what would best achieve the mission and goals
          and objectives of the college, rather than what would
          most benefit a campus or a single department, division,
          organizational unit or program unless the two
          principles are synonymous.

(2.1)   In fact, the operations and the image projected by the
          college shall be that of a single institution with a
          broad delivery system operating through multiple
          administrative units. Publications and other
          informational activities shall make students and
          prospective students aware that all college services
          and programs, wherever located or however administered,
          are available for their utilization.

(3.0)   Operating practices occurring at more than one location
          shall be standardized. Specific delivery techniques
          should be tailored toward specific community needs but
          shall not result in changes to the basic intent of the
          system design.

(4.0)   While there can and probably should be some variation
          among the major organizational units, variation shall
          be based on established criteria. Those activities
          most directly affecting students and the general public
          may encompass the greatest degree of variation in order
          to accommodate a variety of community needs.

          (Board Rule 6Hx7-1.13, pg. 1-34, Adopted: 09-21-83)

(5.0)   Examples of the one college concept include:
          admissions, enrollment, testing, employee
          classification, wages and benefits, budget, planning,

marketing, advertising, publications, Board of
Trustees, state rules and regulations.

CONCERNS

A.   The College has four (4) major campuses, many centers
       and course sites, and a separate central administration
       that have often acted semi-autonomously in recent
       years.

B.   Each campus has a special focus, a unique perspective,
       and an historical tradition that increases its
       autonomous functioning and attitude.

C.   The majority of college employees either have worked at
       their present campus since their employment began at
       FJC or have been at their present positions for more
       than five years.

D.   The coordination and effective control of many
       campus-based programs and staff have been inconsistent
       or lacking.

E.   In spite of the development of comprehensive
       administrative procedures (APMs), the college staff
       interprets and carries out the procedures
       inconsistently.

F.   Although some campuses have developed an identity or
       "family spirit," this spirit has not extended to other
       campuses or to the college. In fact, there is often
       unhealthy intercampus rivalry or antagonism that
       prevents a feeling of belonging to one college and
       accomplishing certain college objectives.

G.   There has been a lack of interaction between fellow
       employees from campus to campus or from central
       administration, e.g., English faculty on one campus do
       not know English faculty on any other campus, or LRC
       workers do not know or communicate with LRC workers on
       other campuses.

H.   There has been a reluctance on the part of college
       staff to apply for or be transferred to positions from
       College Administration to a campus or vice versa, and
       from campus to campus.

I.   The allocation of college resources, particularly
       financial, but also facilities, equipment, and
       personnel, are perceived to be inequitable by various
       college employees.

J.   Many campus personnel perceive that their input into
       college decisions does not count or is not recognized

and therefore, they do not wish to participate in committees or other decision making processes. Additionally, the same people are appointed over and over.

K. A number of other concerns relate to the one college concept that are covered in other issues papers and discussion. These include:

- accountability vs. responsibility of campus vs. College Administration

- conflicting market strategies or no strategies

- unwillingness or inability to be innovative in developing new programs

- inequities in previous downsizing or staffing

- need for development or consistent enrollment management

- present program inefficiency

STRATEGIES

1. Take steps to ensure that all college employees know about, understand, and carry out the Board Rule on the One College Concept.

2. Reorganize and restructure collegewide and campus departments with a view toward establishing collegewide roles, responsibilities and accountability for both instructional and non-instructional departments and divisions, e.g., collegewide academic divisions and departments, collegewide purchasing department, etc.

3. Review alternate budgeting models to meet budgeting needs within the context of FJC's multi-campus situation.

4. Develop a management decision making culture that trains top level supervisors to properly supervise their areas of responsibility, to develop accountability, and to encourage decision making at the lowest practical level.

5. Provide opportunities for the transfer, reassignment, renewal, or rotation of college employees who have become parochial to one college unit, or to those who desire to assume new responsibilities.

6. Change the role and focus of Staff and Program Development to reflect college priorities more closely

and to develop an orderly process for institutionalizing SPD programs that have proven successful.

7. Assist all employees to understand and become involved in developing and carrying out the College Plan. Keep up regular communication about the plan and related activities.

8. Set up opportunities for cross campus functioning, e.g., honors program, student success activities, mentor program, faculty exchanges, career employee sharing, etc.

9. Establish a collegewide student newspaper.

10. Find a way to make credit and non-credit programs work closely together.

11. Develop a new marketing plan for both inside and outside the college that stresses the one college concept.

12. Move meetings around the college so that each group meets on each campus periodically.

13. Cross train increasing numbers of employees so that they can carry out a number of responsibilities or roles at any campus or College Administration.

14. Establish and implement an evaluation system for participation and functioning on college committees and special assignments.

15. Develop a coordinated approach at all levels to see that decisions are carried out in an equitable and timely manner.

A PLAN FOR DOWNSIZING/CREATIVE STAFFING AT

FLORIDA JUNIOR COLLEGE AT JACKSONVILLE

FJC ADMINISTRATIVE COUNCIL

OCTOBER 17, 1985

PLAN FOR DOWNSIZING/CREATIVE STAFFING AT
FLORIDA JUNIOR COLLEGE AT JACKSONVILLE

Background

Based on an anticipated reduction in state revenue due to a
significant decline in student FTE enrollment during the past
four (4) years, the College needs to reduce its operating
budget. Since 78.3 percent of the 1985/86 operating budget
is composed of personnel services monies, it will be necessary
to make up a large amount of the budget shortfall by reducing
the total number of employment positions.

In conjunction with the need to downsize the total number of
positions, the College will be staffing for delivery of
services in creative and non-traditional approaches.
Financial support for staffing will be allocated to areas of
highest priority. Staffing will be based on the most effective
utilization of human resources, including the planning of
staffing needs and the development of personnel to meet those
needs.

Concerns

1. That the College's employees be viewed as its most
    valuable asset; and be managed and assigned in innova-
    tive and fluid ways which result in optimal integration
    of the needs of both the employee and the institution.

2. That the savings resulting from eliminating positions
    and staffing creatively be sufficient to offset a
    significant portion of the projected loss in revenue.

3. That downsizing and staffing alternatives be based on
    the program and service priorities established by the
    College.

4. That there be a direct linkage between strategic planning
    and the direction and scope of these staffing efforts.

5. That the management of these processes promote and
    strengthen the one-college concept and enhance team
    development rather than be fractional and divisive.

6. That the College maintain its commitment to Equal Access/
    Equal Opportunity principles.

7. That employees perceive these processes as open, well-
    conceived, helping the College fulfill its goals and
    mission and not be viewed as arbitrary and capricious.

8. That the College address significant institutional issues,
    such as formal marketing, enrollment management, image,
    student success, strategic planning, etc., which require
    developmental support, consequent to the downsizing.

Strategies

1. Define and communicate to all concerned parties the size
    and nature of the College's fiscal problem. Prior to
    determining the total budget reduction needed for 1986/87,
    identify the new costs resulting from new/expanded grants,
    data base, public relations, and other programs.

2. Determine the amount of the revenue shortfall which needs
    to be addressed and come from the personnel services portion
    of the budget.

3. Prioritize the College's educational programs as well as
    its student and institutional support programs and services.

4. Determine campus/College Administration missions and
    distinctiveness.

5. Define guidelines and objectives of downsizing/creative
    staffing, including alternatives for differentiated staff-
    ing arrangements.

6. Designate responsibility/review groups to analyze current
    levels of staffing and services whose memberships include
    representatives from affected employee groups.

7. Determine, where appropriate, support staff configurations
    that can and should be consistently applied to similar
    functions/offices.

8. Apply staffing changes based on employee skills, abilities,
    evaluated performances and potential for retraining as they
    relate to the needs of the College, in order to maximize
    work force productivity.

9. Develop a process to fulfill short-term staffing needs.

10. Develop a long-range plan which addresses staffing needs
    based on future projections.

11. Inventory talents, skills, and career interests of College
    employees.

12. Analyze and determine how the commitment to Equal Access/
    Equal Opportunity principles can be maintained and
    incorporated into downsizing/creative staffing.

PROGRAM ASSESSMENT AND
DEVELOPMENT SUMMARY

Administrative Council
October 17, 1985

5.0 PROGRAM ASSESSMENT AND DEVELOPMENT

Focus

1.0 The College has during the past two years entered a new era—one
in which enrollments have declined, financial resources are
considerably limited, and program offerings have become static in
many cases.

2.0 The institution can expect little or nothing in the way of new
revenues in the near term and, unless the existing programs are
assessed and modified to meet existing and projected future
needs, only a more depressing scenario can be projected for the
broad array of programs offered.

3.0 At present the College has no comprehensive data-based system of
program monitoring, review and/or evaluation for decision making
regarding program expansion, contraction and deletion. As well,
quantitative and qualitative measures of program performance,
even where available, are not used in an organized process of
decision-making regarding program staffing, equipment purchases,
space allocation, quality and quantity of program graduates.

4.0 The development and implementation of a comprehensive data-based
program assessment system for FJC is a major necessity if the
College is to refocus its resources to meet the most immediate
educational needs of the community.

Concerns

A. Analysis of FJC enrollments by instructional program over the
last five years indicates that the majority of them have fewer
students than they did five years ago. In many cases, enrollment
in a program is down by at least half over this period.

B. Because the College has not freely transferred faculty and
support staff to reflect recent enrollment trends, there is
considerable workload imbalance among faculty members' loads in
the same program or discipline. As well, there are instances
where adjunct faculty have been hired at one site when the
full-time faculty at another site were underloaded and could have
been assigned to teach at the other location.

C. There are numerous instructional programs at the College which
produce only a handful or even no completers in a given year. In
other programs the ratio of those enrolled to those graduated is
as high as twenty to one.

D. The current placement rates for the completers of twenty-two of the College's instructional programs do not meet the State mandated placement standard (70%). Three years of such below-standard performance may result in discontinuation of State funding for these programs.

E. Some of the College's multi-campus programs/enrollments are spread so thinly that there may not be enough critical mass at a given location for the program to function in a viable way. Key decisions need to be made regarding program location.

F. There are major equipment needs emerging in a number of the technical education programs on several campuses. A valid assessment of the viability of these programs is needed prior to large outlays of limited capital outlay resources being made.

G. The term program is used in a variety of ways within the College. It must be specifically defined with regard to its meaning in program assessment. For instance, does the term relate only to instruction or will the support, student development, and business services of the College be considered programs?

H. The College has done little formal marketing of its programs; thus, even if data from the proposed program assessment system were to show that a particular program is in severe decline, we cannot know the cause of the decline for certain until a marketing assessment is done. Lack of a formal marketing approach leaves doubt as to whether a program needs revision, deletion or just has not been well priced, promoted or delivered.

I. In some instances, the advisory committee for a program has not been fully utilized to keep program content, methodology and equipment current. Meaningful consultation with a program's advisory committee is a key element in assessing a program's status.

J. The current administrative reporting structure for multi-campus based programs is dysfunctional in that curriculum content, staffing, course requirements, textbooks, and equipment are inconsistent and uncoordinated among the campuses.

K. There currently exists no formally defined, distinct roles for campuses and centers. Program locations have not been assigned in a systematic fashion in many cases.

L. The curriculum processes of the College are not centered on objective data as the basis of program decision-making. Too many program and course changes are made simply through force of personality--a tenacious individual guides his or her proposal through the process, sometimes in spite of the fact that it may be of dubious value.

M. The excessive emphasis on competitiveness among the campuses has often resulted in one campus opening up a program area and

siphoning off students from another campus, rather than
developing a new program that may be needed.

N. The College has no operating on-line management information
system for managers' use in decision-making. The program data
which are available in printed form are usually structured to
meet State reporting requirements, rather than to serve as
management tools.

O. In some instances, the occupational programs of the College are
so narrowly defined that many of them do not have enough
resources or students to be viable. Program assessment should
point out the need for "umbrella" programs with specific
subtracks for the areas of specialization.

P. The State currently mandates that the College participate in two
"program review" systems. These include the three-level State
Board of Community Colleges program review process and the
two-level Vocational Education program review. There is
considerable overlap in these two systems, and at least a portion
of them will need to be incorporated into the College's Program
Assessment System. Another factor having an impact upon program
assessment is the fact that the College is subject to periodic
review by external accrediting groups including the Southern
Association of Colleges and Schools and various health-related
accrediting groups. Additionally, FJC is peripherally involved
in State University System program reviews.

Q. In 1981, the College acquired and installed a highly
sophisticated computerized Instructional Management Information
System (IMIS). Although this is a very powerful system, and much
time, energy and money was spent to get it operational, it has
been used very little as a management tool and resource in the
last three years.

R. In the College's most recent Community College Accountability
Standards Report and in the 1983 Self-Study Report, the need for
development of a formal process for program assessment is
addressed with plans for using the State processes and the IMIS
being delineated. However, little recent progress has been made
in carrying out those plans.

Strategies

1. Define the goals, objectives, terminology, and conceptual model
for FJC's Program Assessment and Development System, including in
the model the state-level program reviews.

2. Specify the data needed, the sources of these data, data formats
and timelines, computer resources requirements to implement
defined program assessment goals and objectives, as well as
qualitative factors. The System may be developed in two phases,

the first being utilized in the budgeting and staff process to
begin in early 1986. This phase will encompass data currently
available in Level I of the Division of Community Colleges
Program Review System, the FJC Instructional Management
Information System and various other presently available data.
Phase II will be a broader, more comprehensive system.

3. Review the aspects of the Division of Community College Program
    Review Process, the Division of Vocational Education Program
    Review Process, and the previously purchased FJC Instructional
    Management Information System (IMIS) to ascertain which data they
    generate meet the needs of FJC's Program Assessment and
    Development System. Additionally, data relevant to the
    Educational Equity Act and its requirements will need to be
    incorporated.

4. Based upon this review, decide the extent to which the FJC
    Program Assessment and Development System should incorporate
    elements of the State processes and the IMIS.

5. Define the staffing pattern needed for implementation of the
    Program Assessment and Development System and develop job
    descriptions and functional roles for personnel involved,
    including faculty and instructional managers.

6. Clarify the relationship of the outcomes of the FJC Program
    Assessment and Development System with regard to the College
    budgeting process for allocating personnel, equipment, and
    support materials. Particular immediate emphasis should be put
    on development of a system for allocation of instructional
    equipment.

7. Set a process in motion to design, test, and approve for
    implementation the FJC Program Assessment and Development System.

8. Develop a focus within the Program Assessment and Development
    System upon the Associate in Arts degree, including quantitative
    and qualitative measures and standards, including broad program
    issues and outcomes. This evaluation process will focus on pre-
    and postprogram assessment to determine the value added by the
    student's completion of the Associate in Arts degree.

9. Develop and implement a communications plan to inform faculty,
    instructional managers, and staff of the Program Assessment and
    Development System and train and involve appropriate personnel in
    its purposes, development and use.

                                        --L. B. Christofoli
                                        October 9, 1985

ENROLLMENT MANAGEMENT

Administrative Council
October 17, 1985

ISSUE TITLE: ENROLLMENT MANAGEMENT

INTRODUCTION: 1.0 The concept of enrollment management is a
relatively new one. To focus the discussion,
it is first necessary to present a definition.
In a recent publication by The College Board,
Novak and Weiss (1980) provided this definition
of enrollment management:

"Enrollment management involves the planning,
coordination, and integration of traditionally
independent collegiate activities associated
with recruiting, enrolling and retaining stu-
dents." (p. 5)

To understand the breadth of this concept, it
is helpful to consider what "recruiting, en-
rolling, and retaining students" encompasses.

    1.1 Recruiting involves marketing
research and promotional activ-
ities, and includes admission
objectives, identification of
FJC's image, definition of mar-
ket segments, identification of
competitors, and development of
a pricing policy.

    1.2 Enrollment activities include
student aid, admissions, orienta-
tion, entry assessment and place-
ment, initial academic counseling/
advising and an internal enrollment
system for programs and courses.

    1.3 Retention activities may include
student aid, counseling, career
development programs, student in-
volvement activities, institutional
attitude, among others, which
support students to the successful
completion of their goals.

    2.0 Another important source of information
about enrollment management, Strategies
for Effective Enrollment Management by
Kemerer, Baldridge, and Green (1982),
essentially agrees with the enrollment
management definition previously given.
Kemerer, Baldridge, and Green point out
that there are both conceptual and pro-
cedural components to enrollment manage-
ment.

2.1 "As a _concept_, enrollment management implies an assertive approach to insuring the steady supply of qualified students required to maintain institutional vitality." (p. 21)

2.2 "As a _procedure_, enrollment management is a set of activities to help institutions interact more successfully with their potential students." (p. 21)

3.0 While enrollment management is generally associated with the "input" of students, the concept also extends to the "management of the student resource" after enrollment in the institution.

4.0 Enrollment management, then, involves many on-going activities. Because retention is scheduled for discussion as a separate issue, the enrollment management discussion will focus on the recruiting and enrollment aspects of the concept. Some of the concerns have been previously identified (e.g., by the Task Force on Recruitment and Retention), but are presented because of their relevance to this discussion.

CONCERNS: 1.0   FJC has suffered a serious enrollment decline
                over the past three years; the decline has
                been greater than that at similar institutions
                in the State and nation.

          2.0   FJC has not been geared to having to respond
                to enrollment problems.

          3.0   Few people within the institution realized the
                serious nature of FJC's enrollment decline
                until downsizing occurred.

                3.1   There has been a lack of meaningful en-
                      rollment-related information to share
                      with faculty, administrators and staff.

          4.0   Enrollment declines have been viewed as
                campus, program, or someone else's problem
                or administrative responsibility, rather
                than as a College problem.

          5.0   Information support systems for effective
                enrollment management are insufficient.

          6.0   There is a lack of a unified College enroll-
                ment plan. Various offices or divisions have
                developed plans but there is little inter-.
                action between them.

                6.1   Clear and specific enrollment goals,
                      other than campus FTE assignment, have
                      not been set for the College and there
                      has been no coherent process for arriving
                      at goals.

                6.2   Accountability for enrollment has not
                      been established.

                6.3   The importance of the College's various
                      market segments has not been recognized
                      (i.e., special programming, services,
                      publications), nor have recruiting
                      resources been allocated, on a market
                      segment basis.

                6.4   Limited technological support (word
                      processing, computer assistance) has been
                      provided for effective enrollment manage-
                      ment.

                6.5   Insufficient resources (staff,
                      publications, offices) have been
                      provided for recruiting.

7.0 No College marketing plan has been adopted which is appropriately tied to enrollment management.

8.0 The recruiting office, Admissions Services, has had the charge to focus primarily on high school recruiting and has had limited involvement in other types of recruitment.

   8.1 It is unclear to the Admissions Services Office and campus offices exactly who is responsible for what in recruiting whom.

   8.2 Identification of employees collegewide who have responsibility for interacting with the public has not taken place. An employee training program needs to be developed for employees who are so identified.

9.0 The College has not prioritized its various market segments; therefore, it has been difficult to establish enrollment targets.

   9.1 There has not been an effective public relations/communications program to provide information to the College's constituency.

10.0 The enrollment of students, i.e., registration, testing, orientation, initial advising, is not a smooth, effective process.

11.0 A formal admissions process is not in place. Students who are interested in entering FJC have little opportunity for pre-enrollment advising and career exploration.

12.0 There has not been a coordinated program of retention services for students.

13.0 The structure of the organization does not currently accommodate an enrollment management approach.

STRATEGIES: 1.0 Adopt the concept of enrollment management and develop an enrollment management plan which is a clear expression of the College mission. The enrollment management concept should be a regular component of the College's organization and not be a reaction to enrollment declines.

2.0 Clarify the relationship between marketing and enrollment management.

3.0 Clarify the relationship between retention and enrollment management for FJC.

4.0 Develop an enrollment management information system.

5.0 Consider adopting an organizational structure which supports the enrollment management concept as defined.

6.0 Design a process to regularly communicate enrollment goals, concerns and information to the College community.

7.0 Identify and provide appropriate resources to effectively implement the plan, including necessary technological resources and those resources which could be provided by the Foundation.

8.0 Develop a unified recruiting component of the plan which includes:

8.1 Setting recruitment goals.

8.2 Assigning accountability for meeting the recruiting goals.

8.3 Strengthening the recruiting program for the adult learner.

9.0 Develop an enrollment component of the plan which includes:

9.1 Organizing the enrollment process into a systematic, humane one which begins building the foundation for student's success.

9.2 Clarifying and assigning responsibility for meeting student's pre-enrollment concerns.

10.0 Develop a retention component of the plan (to be considered at a future meeting).

11.0 Develop and implement an effective public relations/communications program which supports enrollment management.

6.5 Insufficient resources (staff, publications, offices) have been provided for recruiting.

7.0 No College marketing plan has been adopted which is appropriately tied to enrollment management.

8.0 The recruiting office, Admissions Services, has had the charge to focus primarily on high school recruiting and has had limited involvement in other types of recruitment.

    8.1 It is unclear to the Admissions Services Office and campus offices exactly who is responsible for what in recruiting whom.

    8.2 Identification of employees collegewide who have responsibility for interacting with the public has not taken place. An employee training program needs to be developed for employees who are so identified.

9.0 The College has not prioritized its various market segments; therefore, it has been difficult to establish enrollment targets.

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12.0 There has not been a coordinated program of retention services for students.

13.0 The structure of the organization does not currently accommodate an enrollment management approach.

MODELS: 1.0 Table I (attached) contains a breakdown of the offices typically involved in enrollment management, as reported by Novak and Weiss.

2.0 Kemerer, et al, have identified four organizational strategies for enrollment management which appear to be emerging. Table II (attached) contains a brief outline of the four models.

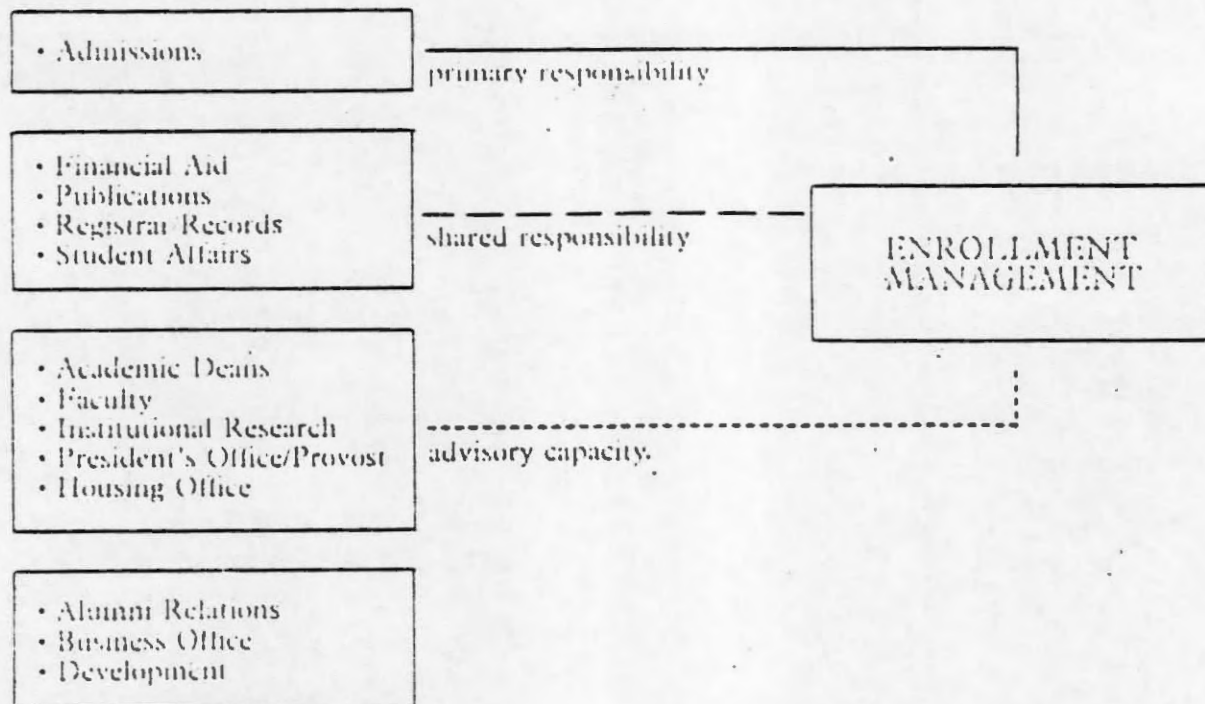# TABLE I: OFFICES INVOLVED IN ENROLLMENT MANAGEMENT

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┌─────────────────────────┐
│ • Admissions            │───────────────────────────────┐
└─────────────────────────┘   primary responsibility      │
                                                           │
┌─────────────────────────┐                               │
│ • Financial Aid         │                               │
│ • Publications          │                          ┌───────────────────┐
│ • Registrar Records     │- - - - - - - - - - - - - │  ENROLLMENT       │
│ • Student Affairs       │   shared responsibility   │  MANAGEMENT       │
└─────────────────────────┘                          └───────────────────┘
                                                           ┆
┌─────────────────────────┐                               ┆
│ • Academic Deans        │                               ┆
│ • Faculty               │                               ┆
│ • Institutional Research│· · · · · · · · · · · · · · · · ┆
│ • President's Office/Provost│  advisory capacity.
│ • Housing Office        │
└─────────────────────────┘

┌─────────────────────────┐
│ • Alumni Relations      │
│ • Business Office       │
│ • Development           │
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TABLE II: COMPARISON OF FOUR MANAGEMENT MODELS

Model	Major Goals and Activities	Personnel	Authority	Structural Changes
Institutional Marketing Committee (Campbell 1980)	Assess and communicate	Committee structure involves mostly administrators but includes some faculty.	Little—committee serves in an advisory capacity.	None—committee has an advisory role, may be an ad hoc institutional response.
Staff Coordinator (Fran 1975)	Coordinate programs that affect enrollment and develop market plan.	Staff person organizationally placed as a special assistant to the provost or president.	Little—position lacks line authority and resources. Influence depends upon persuasion and good will.	Minor—staff appointment that has little impact on organization.
Matrix Model (Kreutner and and Godfrey 1980-81)	Link enrollment activities according to program function without regard for divisional structure.	Senior line administrator who is authorized to evaluate personnel in other divisions.	Assigned by the president but perhaps superseded by divisional powers.	Minor—model attempts to link activities and offices without major structural changes.
Enrollment Management Division (Caren and Kemerer 1980)	Coordinate and control all activities affecting enrollment.	Senior line administrator.	Potentially high.	Significant—program function areas formally assigned to a line administrator.

BIBLIOGRAPHICAL NOTES

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FORMAL MARKETING

Administrative Council
October 17, 1985

8.0 FORMAL MARKETING

Focus

Note: The issues papers on "New Program Development" (September 17, 1985) and "Enrollment Management" (October 1, 1985) dealt with numerous concerns and put forth selected strategies which overlap and complement this area. These papers should be reviewed in concert with this issue discussion of "Formal Marketing."

1.0 "Marketing" is a complex managerial process with sophisticated concepts and principles that has only recently been considered as applicable to non-profit organizations and still more recently to colleges. The process is frequently confused with selling or advertising and typically misunderstood or used poorly. As a managerial process, marketing itself is inherent in the functioning of any organization. What is not inherent, however, is effective marketing which takes special, concerted efforts. The need for effective marketing is answered by formal marketing which provides the proper "mix" and the "strategies" to ensure the successful and productive exchange relationships vital for institutional growth.

2.0 Through a formal marketing approach, an institution is able to: increase the share of the markets currently served; broaden the base of prospects or potential students; incease the depth of penetration with identified markets; increase the cost efficiency of current efforts; and create a favorable image or position for the College and for increased support.

3.0 The benefits of adoption of formal marketing are: more sensitivity and knowledge about community needs; more focused and differentiated programs and services; enhanced institutional positioning and distinctiveness and response to rapidly changing environments; creation of more effective systems of developing, distributing and delivering programs and services, and greater efficiencies; improved student, faculty, administration, staff and community satisfactions; and, practical outcomes with immediate and demonstrable utility.

4.0 By recognizing the elements and variables of the marketing planning process, the College can more effectively plan to become, and stay, a fully responsive organization. At the same time, the College can experience the importance of good marketing strategy development, marketing information, environmental analysis, institutional positioning, marketing feedback and control, and in effect, the systematic approach to marketing planning and management.

5.0 <u>Attachment A</u> is a paper which more fully explains formal marketing as a concept and its context within institutional planning and management for the community college.

Concerns

A. The College does not now have a coordinated, orchestrated approach to formal marketing and institutional positioning and to the formation of strategies focused upon specific segmented markets and their ascertained needs and interests.

B. While there are many examples of spot or informal needs assessments, we do not have a systematic assessment of market segment needs, interests, and preferences or a conceptual model which distinguishes between variations and types of "needs assessments."

C. To be a responsive community-based institution, the College must wholeheartedly accept a consumer-orientation. As a result of knowing and describing what the community needs and wants, we can achieve improved satisfactions and better services. Accordingly, we must resist the temptation to be nonresponsive and complacent.

D. Enrollment declines and problems are seen by many as a result of promotional problems; yet most of the target market analyses indicate that enrollment is greatly affected by the type of programs and services and the delivery offered by the College and by the perceived and real qualities or benefits of those offerings.

E. The College's multiple educational programs and services must inevitably compete for limited recruitment and marketing development resources.

F. Formal marketing must include the positive and productive role-aspect of each staff member at the College and which then enables optimal individual functioning keyed to differentiated roles and motivations.

G. The control of the product--e.g., our programs and services--is not within the domain of the outreach personnel--e.g., Admissions Services--and is dispersed over several layers of responsibility.

H. The market mix variables overlap and interact dramatically--compounding effects make it difficult to isolate the influence of any one decision variable (such as price or promotion) on student demand.

I. Difficulties arise in attempting to monitor the external environment: e.g., fluctuations in the external environment are difficult to anticipate as are the impacts of such changes; competitor counter-marketing strategies are difficult to monitor before actually implemented; and measurement problems are inevitable.

J. There is the possibility that the concept of marketing, and the related aspects of enrollment development and enrollment management, will be oversold or abused--that increased knowledge about the college choice process and market sensitive pricing, as examples, can be manipulated; that quick-fix methods will yield poor student-institution fit and the lack of satisfactions.

K. There is the potential that an over-emphasis on consumerism can damage the College's educational integrity; instead there needs to be a healthy tension between consumerism and responding to market needs, interests, and preferences and the maintenance of original mission and integrity.

L. Marketing failures are usually traced to an absence of plans or to sound marketing plans that were ignored, not to poor plans that misled the users.

M. As educators, we typically become so concerned and preoccupied with the day-to-day operations that we fail to consider what is happening to our markets; and yet planning is the most urgent aspect of marketing.

N. There is a lack of full market segmentation in terms of our programs and services development and delivery, as well as other aspects of the market mix.

O. Non-profit organizations such as colleges have a reputation for being run less efficiently than their profit-making counterparts and hence for not needing to focus on formal marketing; however, the principles are equally applicable to non-profit organizations and to colleges and universities, and the need for formal marketing may be even more evident.

P. The failure to implement systematic control and monitoring systems which address the functions involved in the marketing mix, often interferes with successful formal marketing.

Q. The administrative steps of marketing planning and control cannot be carried out effectively without an adequate and reliable base of marketing information--e.g., the market place, competition, the organization, market strategies, performance outcomes.

R. We cannot be all things to all people; an over-eager, albeit well-intended, entrepreneural effort without planning, analysis, and careful institutional positioning will only weaken the products the College develops.

S. Customer markets, although homogeneous in appearance, are composed of a number of different subsets or segments; each segment's needs, interests, and preferences are assessed as the basis of the formal marketing effort, as is the position of the College in response to that assessment.

T. The introduction of marketing sets in motion a series of
    appraisals or evaluations that will disclose weaknesses in
    performance, distressing needs or modifications of operations,
    and unexpected gaps, conflicts, or obsolescence in basic
    policies--all of which can be disruptive.

U. Marketing is, and should be viewed as, a change agent process--to
    embark upon a formal action of marketing means that the College
    should expect change, realize the need for caution, and
    anticipate with full knowledge the potential effects.

V. To be effective, marketing requires a new orientation for the
    organization, a new attitude toward our various publics and
    toward our mission on orientation toward our market segments not
    toward other more parochial, own campus, own department
    perspectives; while this attitude certainly is consistent with
    the community college mission, the change can be traumatic.

Strategies

1. Adopt the concept of college-wide formal marketing, with the
    President and the President's Management Team providing the
    leadership and support for its full and continuing development,
    implementation, and philosophical advancement.

2. Utilize formal marketing planning as a vehicle by which to
    continue to identify and analyze situational problems which recur
    and are systemic within the organization and which impede the
    College from becoming a truly responsive institution.

3. Name, describe, clarify and segment the markets served by the
    College--demographics, characteristics, composition, needs,
    interests, images, perceptions--in order to arrive at the bases
    to develop market-by-market plans and then generate an enrollment
    development plan(s) and an educational environment management
    plan(s).

4. Identify the present and new markets we wish to impact and can
    serve best and assess our institutional positioning--strengths
    and competitive position--with respect to each market segment,
    and distinguish the markets as primary, secondary, and target.

5. Adopt a formal marketing orientation which includes a coordinated,
    orchestrated approach to marketing and of institutional position-
    ing and the formation of strategies focused upon segmented
    markets.

6. Make the philosophical institutional commitments necessary to
    fully implement formal marketing as a planning and management
    process and complete the necessary structural adjustments:

(1) We are not simply recruiting students for the next term but are planting long range communication seeds;

(2) We conduct institutional analyses to find out why we appeal to some and not others and to create systems and an atmosphere that facilitate opinions, feedback, and responsiveness;

(3) We are committed to organizational development and concerned with change and improvements to the College's holistic organizational structure--achievement of a healthy climate;

(4) We are willing to engage in risk-taking and criticism; and

(5) We accept the fact that the entire practice of formal marketing must be orchestrated--must have coordination and not be at cross-purposes.

7. Maintain and enhance the services which support the marketing activities: mass media, graphics design, illustrations, photographic services, publications, mailing lists, word/text processing, editing, print services, duplication, mass mailings, market research, direct mailings.

8. Develop a specialized audit instrument and utilize the instrument to conduct a marketing audit or assessment from the perspective of the values, purposes and traditions of the College. (See Attachment B.)

9. Establish a full series of cost-benefit analyses, control reports, and coordination systems for our major recruitment and enrollment development efforts--e.g., inquiries generated by source, follow-up actions and yields, no-further-interest and the timing, cost-per-inquiry/applicant/enrollee--to determine strengths and weaknesses and spot opportunities for improvement.

10. Initiate research on market behaviors, including decision processes, decision influentials, preference alternatives, competition, and choice factors, and assess the flow of the various processes--e.g., admissions, registration, orientation.

11. Complete the series of steps for full implementation of formal marketing:

(1) Pre-Planning: Understanding the marketing concept

(2) Top Management Sponsorship: Setting the decision style and expectations

(3) Organizational Structure: Adopting a more effectual performance of the functions

(4) Coordination: Integrating and orchestrating of the market-impinging activities

(5) Education and Training: Providing for technical training sensitivity orientations, and the role of each individual

(6) Institutional Positioning: Assessing strengths and competitive position

(7) Examination of the Exchange Relationships: Providing for analyses, market audits, market research

(8) Strategy Formulation--Focusing on publics whose needs match the College through the development of the market mix

(9) Evaluation--Determining the accountability and outcomes

12. Develop and implement marketing objectives which address the extent of commitment to present and new market segments and the overlap with program development and modification, as products of a Program Assessment and Development System. (See Attachment C.)

13. Adopt the definitions and structure for "formal marketing," "enrollment development," and "educational environment management" within the context of strategic planning as per Attachments D and E.

14. Orient the marketing planning toward no sooner than fall 1986, so that the impact upon actual enrollments would probably not be experienced until winter/fall 1987. (See Formal Marketing Plans/Documents, Attachment F.)

8.0 FORMAL MARKETING

Attachments

Attachment A: Article: "Marketing Planning . . . The Essential Activity for Colleges," (August 1983)

Attachment B: Marketing Audit Review

Attachment C: Marketing Opportunities Grid

Attachment D: Definitions: Formal Marketing, Enrollment Development, and Educational Environment Management

Attachment E: Formal Marketing Model

Attachment F: Formal Marketing Plans/Documents

Attachment G: Sample--Market Segment Planning Element

MARKETING PLANNING ...
THE ESSENTIAL ACTIVITY FOR COLLEGES

E. Timothy Lightfield

Planning Stages

All organizations plan—including colleges. The differences exist in how extensively, thoroughly, and formally this planning is done. A particular kind of planning, or approach to the planning component of planning/management/ evaluation efforts, can have immediate-and long-range—impact on your campus. This kind of marketing planning can be the criticial element in your planning and management systems can make "planning" meaningful to the college because it emphasizes both process and involvement.

"Plans are worthless, but planning is worthwhile." Many people intimately connected with master plan development would agree. But too many others, perhaps most others, on too many campuses would not agree, and might go so far as to say: "Plans are worthless, but planning isn't worth much either!" However, the approach to planning that involves marketing can open the eyes of even the stodgiest accounting clerk and most ivy-covered faculty member. We are convinced that all organizations can gain from the kind of planning—even colleges. As a matter of fact, especially colleges.

Before delving in depth into marketing planning, take an honest look at the focus of planning at your campus and raise some tough-minded questions.
— Does your planning focus inward on resources, faculties, and the curriculum—or outward on the marketplace?
— Is your planning oriented to the present—or to the future?
— Is it long-range, short-range, or both?
— Does it concentrate on current problems and headaches—or on the identification of opportunities?
— Does the planning address company—or consumer—priorities?
— Do the needs of the institution prevail—or the needs of the students?

The planning may also be scrutinized in terms of activity or involvement by the people at the college. To oversimplify, we can note three basic ways of directing the planning effort:
— *Top-Down Planning:* In this extreme approach, plans are developed by top management or by a consulting firm identified by top management or by executive(s) responsible to top management. The plans then are carried out by everyone else. This is typically labeled the "authoritarian" approach and has the advantage of expedicency and reasonably high expectation as to actions or strategies.
— *Bottom-Up Planning:* This is the other extreme. Each operating manager—director, chairperson, coordinator, faculty member— prepares a set of objectives and plans, constituting what he or she feels capable of achieving. Frequently these plans are set within some broad framework, perhaps of global goals or broad parameters, perhaps even "key result" areas. But the onus of the planning is on the middle- and low-level manager. Managers can typically be called upon to commit themselves to those plans which they themselves have designed. Being the peoples

that we are, however, we have the tendency, due to human nature or social pressure, to set "realistic" or "safe" rather than "challenging" goals—goals which top management may well feel are not challenging enough or crucial enough to the college.
— *Participative Planning:* This type of planning starts with a review by top management, perhaps with input from within the organization, of the situation and opportunities facing the organization, and then the formation or development of a broad set of planning parameters and objectives to be filled in at the middle and lower levels in an interactive process. "Participative planning" is often confused with and misunderstood as "bottom-up planning." The participation is actually very much controlled and directed.

If you had to pin down the planning approach at your institution, which one of these three would you admit to as being yours?

Planning Evolution

Most organizations actually go through an evolution in planning activity. It almost seems that this evolution is necessary and that the

institution has to experience the inevitable growing pains of earlier forms before evolving to the higher forms of planning.

The typical organization starts out with no formal planning. There may be occasional management meetings to review accomplishments and to agree on the next steps, but nothing formally thought out or conceived. After a time, most managements recognize that ad hoc or irregular planning leads to problems that they are unprepared to handle. The organization then decides to adopt some sort of procedure or process for annual planning.

Eventually the organization realizes that meaningful annual planning requires a broader framework or context. Thus, long-range planning is adopted. The annual or short-range plan probably covers the budget cycle for the upcoming year, while the long-range plan usualy covers a period of three-to-five years or more.

Still later, the organization recognizes the desirability of product-by-product and market-by-market planning involving the long-run development of people and positions and an effective organizational structure. This type of planning, accomplished by the particular organizational units, becomes integrated into the formal or total organizational planning effort.

Which stage in this evolution has your college reached? And why then do colleges need formal marketing planning? Why do we need to follow this evolutionary path?

Marketing As Critical

Many colleges have been using a disjointed form of marketing and have concentrated on serving institutional rather than student and constituency needs. Sensitive to declining enrollments and dwindling supply, many other institutions have already altered their education "product" to appeal to different segments of the market—older adults, senior citizens, weekend college programs for older housewives, handicapped, etc. The other marketing mix elements—promotion, pricing, and distribution—are also receiving greater attention. Beyond promotional brochures, colleges are using mass media advertising, radio, and TV. Some have experimented with various pricing packages. Moreover, colleges are

broadening their channels of distribution by offering classes at military bases, industrial forum sites, high schools, public libraries, and prisons, and presenting courses on TV.

Marketing itself is inherent in the functioning of any organization. All organizations offer some kind of product to some kind of consumer and use the tools (the market mix) of marketing—product, distribution, pricing, communication—in the attempt to achieve the exchange. What is not inherent, however, is "good" marketing, which takes special efforts. The need for effective marketing is answered by formal or professional marketing, which provides the proper "mix" and the "strategies" to ensure the successful and productive exchange relationships vital for institutional survival and growth.

Marketing Appraisal

In beginning a marketing planning approach, a logical first step is to conduct an appraisal or audit of the College's marketing. Such an examination usually has the characteristics of being comprehensive and systematic, and it involves an independent or at least reasonably objective assessment repeated on a periodic basis. Such an appraisal focuses upon the college's marketing from the perspective of its institutional position, the adopted strategies or approaches to marketing, the structure or organization of the college for formal marketing, and the systems developed and implemented to achieve full marketing.

The appraisal typically is organized through a series of worksheets or explicit guidlines to help the college analyze its marketing strategy and planning approaches as well as the responsiveness of the organization, rather than constituted as random or haphazard attention to assorted concerns. The worksheet or checklist helps the audit team concentrate upon the critical elements of the marketing mix.
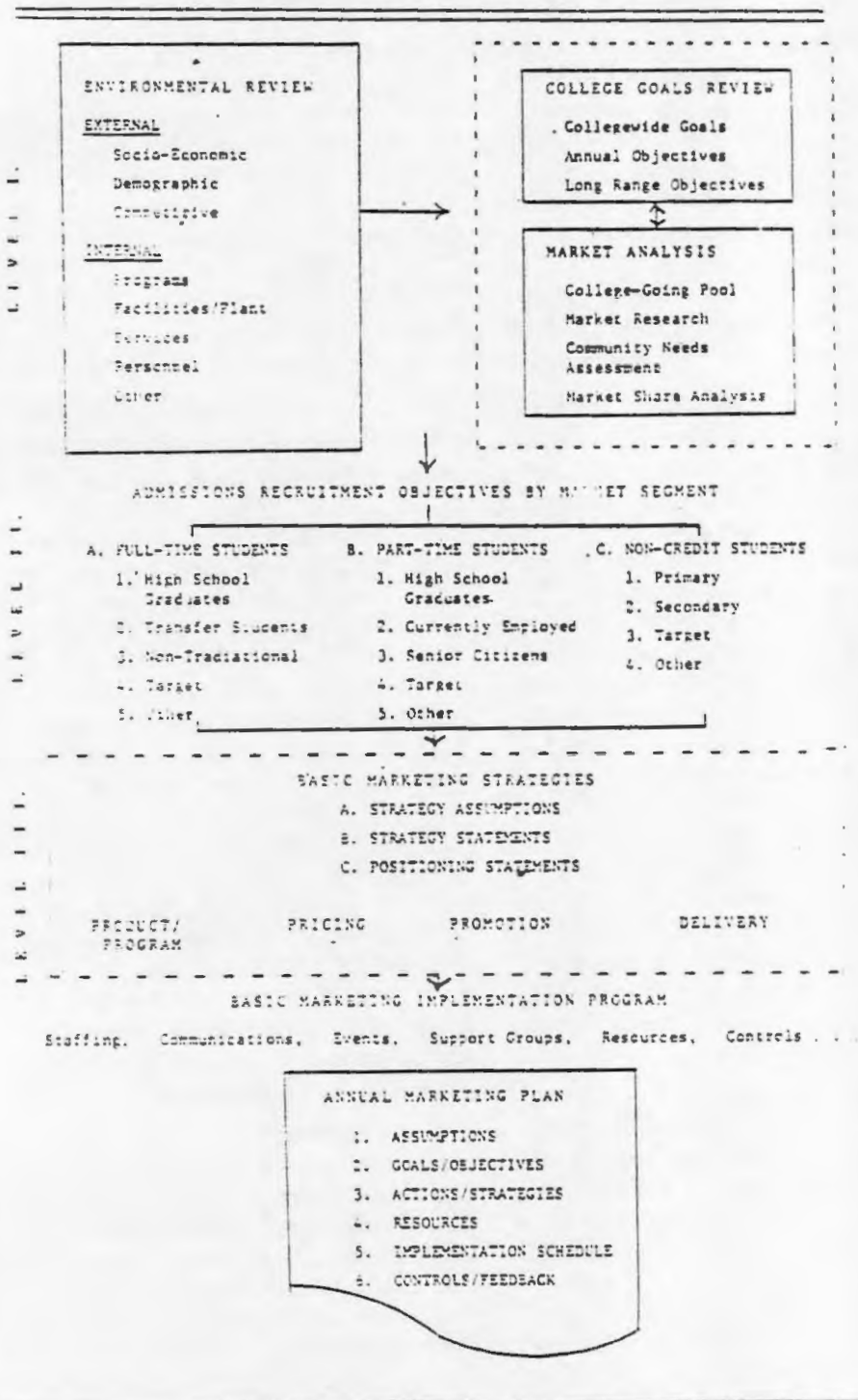
Through the marketing appraisal, the college is able to develop findings about problem areas and opportunities for improvements of the organization's marketing performance. For the college to remain viable, management must provide for this periodic examination of objectives, resources, and opportunities. It must regularly reexamine its basic business, target groups, communications, support services, and other areas, in light of current trends and needs and the effectiveness of the marketing strategies employed.

The Marketing Plan

A marketing plan is a result of the careful examination of the organization's resources, goals, objectives, environment, and the market in which it operates. Like all other company plans, it cannot work in isolation. Each department within the organization has its own plans which at any given time are in different stages of completion. A successful marketing plan must take all these departmental or unit plans into consideration. Thus a marketing plan is a consolidation or orchestration of the many smaller plans, each adjusted to mesh smoothly into a central plan for achieving the college's general policies and objectives so that it can become an organizational plan.

A marketing plan document includes

FIGURE A.
MARKETING PLANNING PARADIGM

ENVIRONMENTAL REVIEW

EXTERNAL
Socio-Economic
Demographic
Competitive

INTERNAL
Programs
Facilities/Plant
Services
Personnel
Other

COLLEGE GOALS REVIEW
. Collegewide Goals
Annual Objectives
Long Range Objectives

MARKET ANALYSIS
College-Going Pool
Market Research
Community Needs Assessment
Market Share Analysis

ADMISSIONS RECRUITMENT OBJECTIVES BY MARKET SEGMENT

A. FULL-TIME STUDENTS
1. High School Graduates
2. Transfer Students
3. Non-Traditional
4. Target
5. Other

B. PART-TIME STUDENTS
1. High School Graduates
2. Currently Employed
3. Senior Citizens
4. Target
5. Other

C. NON-CREDIT STUDENTS
1. Primary
2. Secondary
3. Target
4. Other

BASIC MARKETING STRATEGIES
A. STRATEGY ASSUMPTIONS
B. STRATEGY STATEMENTS
C. POSITIONING STATEMENTS

PRODUCT/PROGRAM   PRICING   PROMOTION   DELIVERY

BASIC MARKETING IMPLEMENTATION PROGRAM

Staffing, Communications, Events, Support Groups, Resources, Controls . . .

ANNUAL MARKETING PLAN
1. ASSUMPTIONS
2. GOALS/OBJECTIVES
3. ACTIONS/STRATEGIES
4. RESOURCES
5. IMPLEMENTATION SCHEDULE
6. CONTROLS/FEEDBACK

4. RESOURCES
To what extent are the resources—budget, space, staff, equipment, time, etc.—devoted to or allotted to accomplish the strategies?

5. IMPLEMENTATION
What are the activities, schedules, organization, structure, staffing, directing, and decision-making procedures—the implementation schedule?

6. CONTROLS
What reports and procedures are to be in place for monitoring, evaluating, and correcting the actions and the implementation?

Marketing Pannning Paradigm

Several models or planning paradigms exist as a conceptual framework for marketing planning. Most models, however, are based upon the profit-organization or upon the non-profit organization in the general case rather than the specific case of a college.

Figure A is a marketing planning paradigm directed at a college and the include the key components involved in a marketing plan. The model identifies the relationships among the strategies analysis at Level I of the external and internal environmental constraints (Environment Review) and of the market position and perceptions (Marketing Analysis) in relationship to the focus upon the college's goals and objectives.

From this strategic interaction and the development of parameters about the general environmental variables, the college begins to identify specific goals or objectives on a market-by-market basis at Level II of the paradigms. Such segment analysis enables the college to think of and position itself in a differentiated market approach. The paradigm shows the illustration of a college in which the market areas of full-time students, part-time students, and non-credit students are broken down by the respective primary, secondary, and target market identities. Another college might have a different set of market areas and certainly of idnetified primary, secondary, and target market segments.

At the next level of the paradigm, and structured from the market-by-market analyses and objectives formulation,

ix components, in one arrangement or nother, and addresses the following uestions:

1. ASSUMPTIONS
What are the assumptions being made about the marketplace or market position of the college that can serve as planning guidelines or parameters?

2. GOALS/OBJECTIVES
What are the end results desired?. What is the scenario for each of the output or key result areas?

3. ACTION STRATEGIES
What are the actions—means, strategies, practices, programs—by which the goals or objectives are being pursued?

the college builds its basic Marketing Strategies. Such strategy companies may be in the form of assumptions and then of strategies for meeting the desired goal consistent with the assumption. Each strategy concentrates upon one or more of the working variables in the market mix—pricing, product/program, promotion, delivery—and which are within the capability of the college to control and manipulate in order to maximize responsiveness. An example of the planning elements within this level of the paradigm is noted in Figure B.

With the agreed-upon Marketing Strategies document, the college can then implement the operational aspects of the plan—the Implementation Program, noted in Figure A. Such variables would concentrate upon tactics and mechanics, scheduling, procedures, and guidelines such as those concerned with staffing, communications, events/activities, and support groups. The strategies become operational at this point.

In addition, the implementation program would identify and highlight the particular feedback information and controls to be put in place to monitor, evaluate, and correct each strategy put into place. Without such controls, of course, the college manager has no manner, other than intuitive, to know and demonstrate the success/failure of the respective strategy.

The end result is the annual marketing plan as a directly useful product of the planning activities. Of course, the paradigm assumes a linear progression of the planning activity, when in reality, the activities are more complex and complicated, the variables overlap and interact, and fluctuations in the external environment create a far more fluid process. For example, the competitor may institute a counter-market strategy or tactic that could not have been anticipated.

By recognizing the elements and variables of the marketing planning process, the college can more effectively plan to become, and stay, a fully responsive organization. At the same time, the college can experience the importance of good marketing strategy development, marketing information, environmental analysis, marketing feedback and control, and in effect, the systematic approach to marketing planning and management.

FIGURE B.
PARADIGM PLANNING ELEMENTS—LEVEL III

MARKET AREA SEGMENTS A.
Primary Market—High School Graduates

OBJECTIVES:

To increase the yield of students from inquiries, to applicants, to actual enrollees for the identified market segment through coordinated efforts and via personalized, persistent follow-up and tracking efforts to achieve a 10% increase in the fall term over the last fall term in the new student enrollments from the market segment.

ASSUMPTION:

That, the respective yields can be increased significantly over present yields with such personalized and persevering efforts and with an information base operated from a controlled system.

STRATEGIES:

Market Mix	Strategy Item
Delivery	1. To build a pre-application admissions processing flow system based upon personalized direct mailing, referrals, and personal contacts.
Delivery	2. To build a post-application admissions processing flow system based upon receipt of the admissions application and persistent follow-up efforts.
Program	3. To design and implement, within the admissions processing system, a campus visitation program at the point within the flow of personal contact, incorporating responsive counseling and advising services.
Delivery	4. To build a control and monitoring system so that all inquiries are fully recorded and the progress along the respective admissions processing flow system is carefully tracked.
Promotion	5. To develop and implement a system for updating and maintaining a timely inventory of publications/communications used for the generation of inquiries and for stages of admissions processing.

FIGURE III
1983 TITLE III APPLICATIONS RECOMMENDED FOR FUNDING

PART A PLANNING GRANTS

New Jersey
Bergen Community College
Morris County College.
Salem Community College

New York
North Country Community College

North Carolina
Beaufort County Community College
Pamlico Technical College

Ohio
Southern State Community College

Pennsylvania
Mansfield State College
Pennsylvania Institute of Tech.

South Carolina
Chesterfield-Marlboro Tech. College

Texas
Southwest Texas Junior College

PART A RENEWABLE GRANTS

Alabama
Troy State University

California
California College/Arts & Crafts
Mount St. Mary's College

MARKETING AUDIT REVIEW

EVALUATION IS AN ESSENTIAL ASPECT OF FORMAL MARKETING--
TO DETERMINE AND APPRAISE WHAT IS BEING DONE, AND RECOMMEND
WHAT SHOULD BE DONE IN THE FUTURE. THE FOLLOWING AREAS KEY
THAT AUDIT:

1. MARKETING ENVIRONMENT REVIEW
   EXISTING MARKETS AND MARKET SEGMENTS
   CUSTOMERS/STUDENTS
   INSTITUTIONAL POSITION
   COMPETITION
   MICROENVIRONMENT

2. MARKETING SYSTEM REVIEW
   MARKETING OBJECTIVES
   MARKETING STRATEGIES
   RESOURCES ALLOCATED
   MARKETING PLANS
   MARKETING CONTROLS
   MARKETING INFORMATION SYSTEM
   ORGANIZATION FOR MARKETING
   UNDERSTANDING OF MARKETING

3. MARKETING ACTIVITY REVIEW
   PRODUCT MIX (PROGRAMS AND SERVICES)
   PRICING MIX (COSTING)
   DISTRIBUTION MIX (DELIVERY)
   PROMOTION MIX (COMMUNICATIONS)

MARKETING AUDIT REVIEW

E. Timothy Lightfield

Evaluation is the key aspect of the marketing effort in order to determine and appraise what is being done and recommending what should be done in the future. The following areas and questions are used to key that audit or review.

I. MARKETING ENVIRONMENT REVIEW

    A.   Existing Markets

        1.   Who are the major markets and publics?

        2.   What are the major segments in each market?

        3.   What are the key characteristics of each market segment?

        4.   What is the size of each market and each segment and what is our current share?

    B.   Customers/Students

        1.   How do students and the public feel toward and see the college—institutional image?

        2.   How do students in each market segment make application/enrollment decisions?

        3.   What is the present and expected future state of needs and expectations for these market segments?

        4.   What is the present state of satisfactions?

    C.   Macroenvironment

        1.   What local developments in demography, economy, technology, government, and culture will affect the situation? How?

        2.   What regional or statewide developments will affect the situation? How?

    D.   Competition

        1.   Who are the competing colleges/agencies—by market and segment?

        1.   What are the competitive trends?

3. What information do we have on our competition and how do we use it?

II. MARKETING SYSTEM REVIEW

A. Goals/Objectives

1. What are the short- and long-range marketing goals and objectives?

2. Are the marketing objectives tied to the collegewide objectives?

3. Are the marketing objectives measurable? time bound? prioritized?

4. What institutional concensus is there for the marketing goals/objectives?

5. Are the marketing objectives challenging and yet reasonable given the competitive position, resources, and opportunities?

B. Program

1. What are the basic strategies for achieving the marketing objectives? Are they likely to succeed?

2. What are the resources allocated to the marketing program?

3. Are the resources efficient to accomplish the tasks?

4. Are the marketing resources allocated optimally to the various markets, territories, products and services of the organization?

4. Are the marketing resources allocated optimally to the major element of the marketing mix--product quality, promotion, distribution?

C. Implementation

1. Does the college have an annual marketing plan?

2. Has the college implemented control procedures to ensure that the annual plan is being achieved?

3. Does the college carry out periodic studies to assess the contributions and effectiveness of various marketing activities?

4. Does the college have an adequate marketing information system to service the needs of other managers for planning and controlling operations?

D. Organization

1. Does the organization have an executive marketing officer/designee to analyze, plan, and implement the marketing work?

2. Are other persons involved? Are they qualified? Is there need for more training, incentives, supervision?

3. Are the marketing responsibilities structured to meet the needs of the different marketing activities and markets?

4. Do faculty, administrators, and staff understand and practice formal marketing concepts?

5. Does the president and other key executive officers fully understand formal marketing and support its full implementation?

III. MARKETING ACTIVITY REVIEW (MARKET MIX)

A. Product--Programs and Services Mix

1. What are the main programs and services of the college?

2. What is the general state of health of each program and service?

3. What is the identified market or market segment for each major program and service?

4. Should any programs or services be discontinued or added?

B. Pricing Mix

1. To what extent are tuition and fees based on cost, demand, competitive criteria, and/or the respective market segments?

2. What would be the likely response of demand to a higher or lower tuition?

3. How do the students interpret the tuition/fees schedule?

4. Does the college use temporary price promotions or tuition incentives? Are they effective?

C. Distribution--Access Mix

1. What are the various ways that students/public have access to the college's programs and services?

2. Are there other methods to distribute/deliver that would result in more service or less cost?

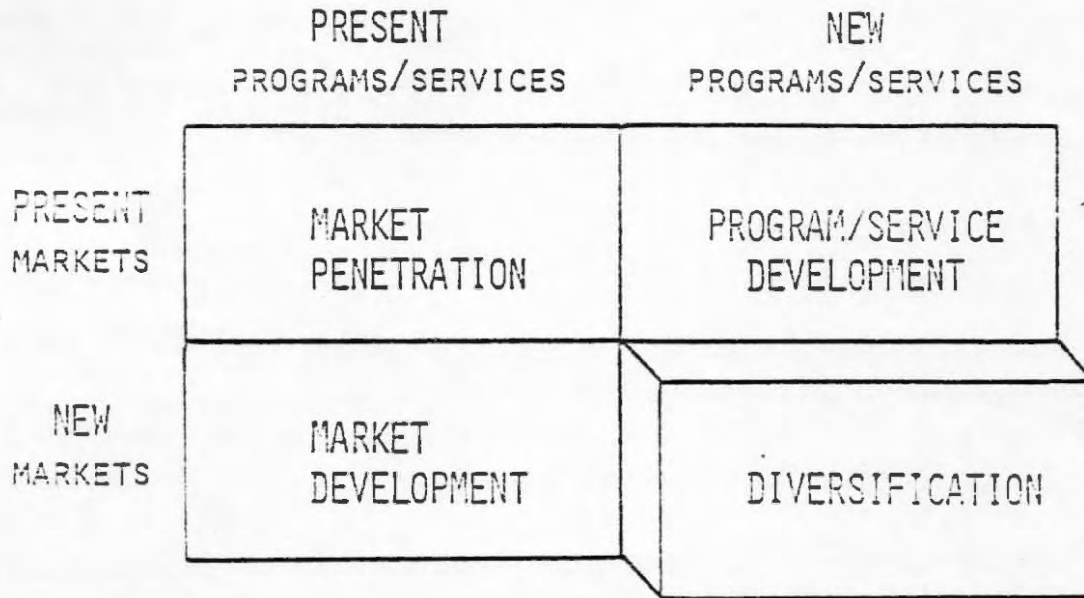3. Does the college render adequate support services along with the product?

D. Personal Contact Mix

1. Can the personal contact force(s) accomplish the objectives--ability, morale, effort, numbers?

2. Is the personal contact force(s) organized along proper principles--i.e., territory, market, product?

3. Are procedures adequate for monitoring and evaluating performance?

4. What contacts do others within the college--faculty, adjuncts, clerical, security, trustees--have with students and the public?

E. Promotion Mix

1. Does the college adequately state its promotional objectives--advertising, direct mail, publications?

2. Are sufficient resources allocated to promotions and to a communications mix?

3. Are the communication themes and copy effective, and do they address a specific audience?

4. What are the basic publications/communications of the college and what is the function of each? What is missing?

5. Does the college have a carefully formulated program of publicity?

6. What is the promotional mix for each program and service? For each market?

MARKETING OPPORTUNITIES GRID

	PRESENT PROGRAMS/SERVICES	NEW PROGRAMS/SERVICES
PRESENT MARKETS	MARKET PENETRATION	PROGRAM/SERVICE DEVELOPMENT
NEW MARKETS	MARKET DEVELOPMENT	DIVERSIFICATION

Definitions

FORMAL MARKETING:

The management process of identifying and analyzing specific needs and interests within the communities served; satisfying those needs and interests by developing responsive programs and services, consistent with the College's mission and philosophy; communicating the availability of these programs and services as responsive and as beneficial to the community; and, providing these programs and services at reasonable costs and at responsive times and places.

ENROLLMENT DEVELOPMENT:

The assertive planning, coordination, and integration of activities associated with recruiting and the initial enrollment of market segments into the College in order to influence selection of a college, impact actual enrollments at the College, and maximize the matching of the student market characteristics and those of the College (student success).
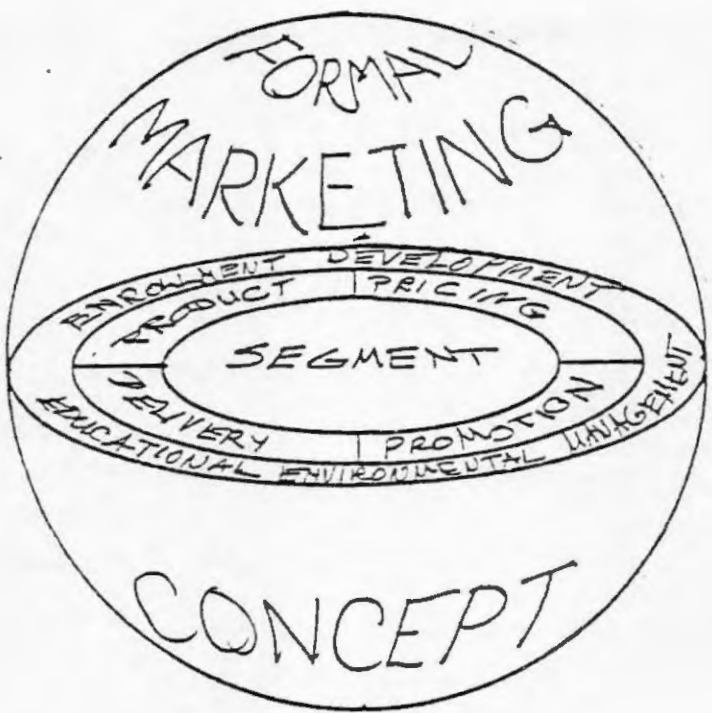
Such activities include: outreach, pre-enrollment counseling, program advising, student aid assistance, orientation, testing, entry placement, registration, and institutional and educational research.

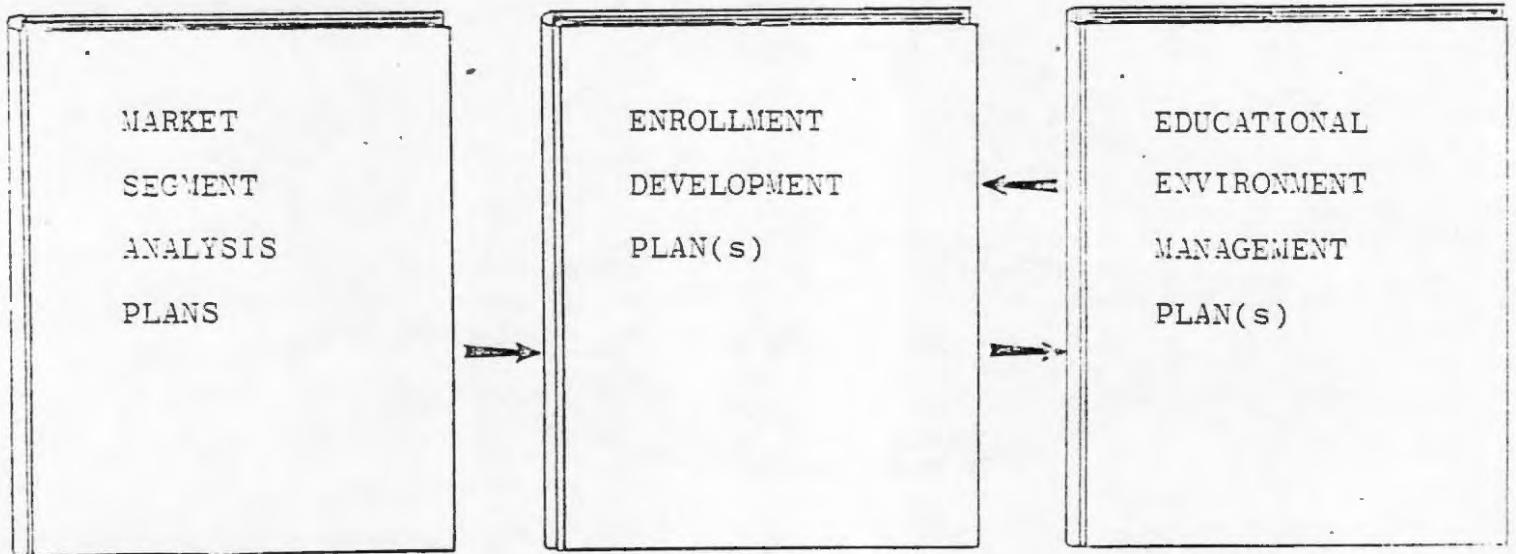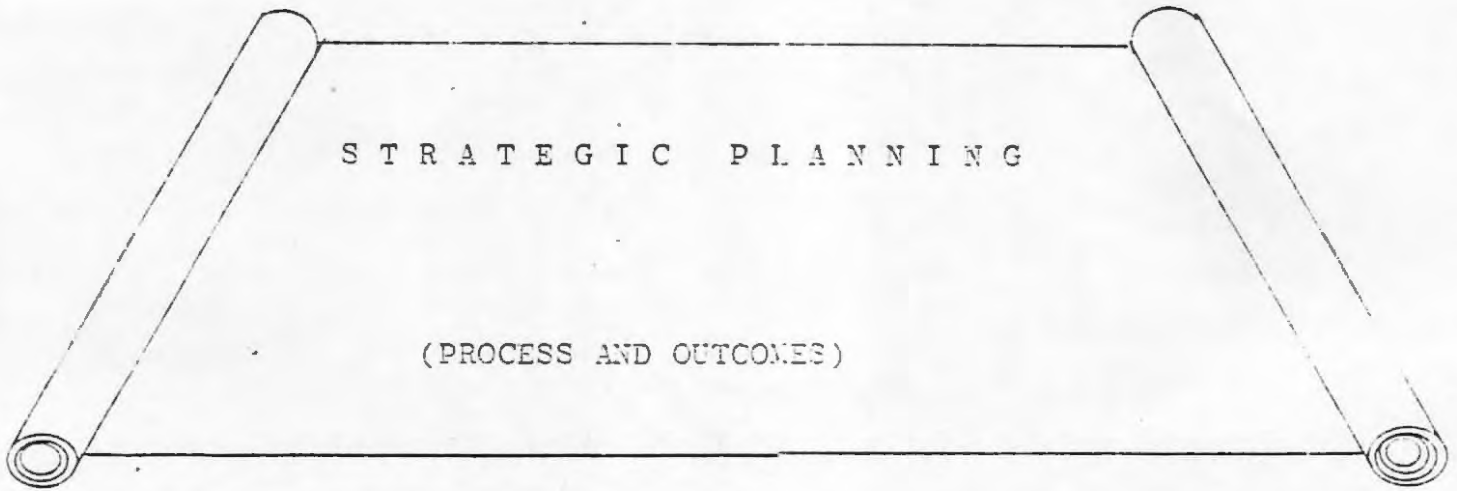### EDUCATIONAL ENVIRONMENT MANAGEMENT:

The assertive planning, coordination, and integration of activities associated with student success and maintaining enrollments of market segments entered in and enrolled with the College including the systematic assessment of all aspects of the college environment, the insistence upon an instructional vitality that is conducive to enrollment productivity, and maximizing the match of the enrolled students with the characteristics of the College (student success).

Such activities include: course and class scheduling, sequencing, faculty resource allocation, counseling, advising, goal identification and attainment, involvement, academic assistance, student activity services, career planning, and institutional and educational research.

FORMAL MARKETING MODEL

FORMAL MARKETING PLAN/DOCUMENTS

S T R A T E G I C   P L A N N I N G

(PROCESS AND OUTCOMES)

MARKET SEGMENT ANALYSIS PLANS	ENROLLMENT DEVELOPMENT PLAN(s)	EDUCATIONAL ENVIRONMENT MANAGEMENT PLAN(s)

PROGRAM ASSESSMENT AND DEVELOPMENT SYSTEM
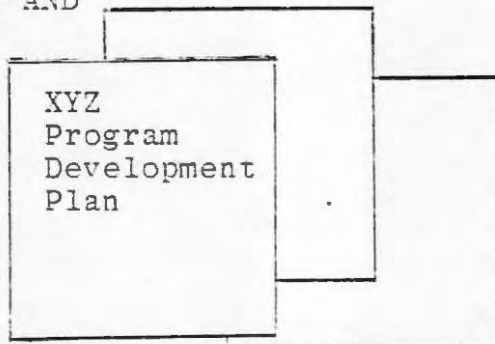
XYZ
Program
Development
Plan

FIGURE B.

PARADIGM PLANNING ELEMENTS--LEVEL III

MARKET AREA SEGMENT A.
Primary Market--High School Graduates

OBJECTIVE:

To increase the yield of students from inquiries, to applicants, to
actual enrollees for the identified market segment through coordinated
efforts and via personalized, persistent follow-up and tracking efforts
to achieve a 10% increase in the fall term over the last fall term
in the new student enrollments from the market segment.

ASSUMPTION:

That, the respective yields can be increased significantly over present
yields with such personalized and persevering efforts and with an
information base operated from a controlled system.

STRATEGIES:

Market Mix		Strategy Item
Delivery	1.	To build a pre-application admissions processing flow system based upon personalized direct mailings, referrals, and personal contacts.
Delivery	2.	To build a post-application admissions processing flow system based upon receipt of the admissions application and persistent follow-up efforts.
Program	3.	To design and implement, within the admissions processing system, a campus visitation program at the point within the flow of personal contact, incorporating responsive counseling and advising services.
Delivery	4.	To build a control and monitoring system so that all inquiries are fully recorded and the progress along the respective admissions processing flow system is carefully tracked.
Promotion	5.	To develop and implement a system for updating and maintaining a timely inventory of publications/communications used for the generation of inquiries and for stages of admissions processing.