

# Blueprint for the Future

2007-2012



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# **Charter Oak State College Blueprint for the Future**

## **Introduction**

Charter Oak State College is approaching its thirty-fifth anniversary. Established in 1973 by the Connecticut General Assembly to “develop and coordinate the implementation of new methods of awarding undergraduate degrees and college credits,” the College continues to remain true to this mission of innovation. It remains a public, freestanding institution with no residency requirement, providing “degrees without boundaries.”

Although the foundational principles of the College – access, student support, and credit assessment – still guide the work of the institution, the College has utilized technology to deliver and improve programs and services. Over the past ten years, the College has moved into the delivery of online education and has witnessed a tremendous growth in this aspect of its work. In 1998-1999, the College offered six different credit online courses, and had an enrollment of 63. In 2006-2007, the College offered multiple sections of 136 different credit online courses with an enrollment of 4,180 students. Due to technology, there also has been a shift in where the student body resides, with 53% of its students living in Connecticut in October of 2006.

A number of other events during the past 10 years have contributed to the vibrancy and health of the institution. The College has a respectable reserve; its Foundation has grown its assets from just over \$15,000 to close to \$1.5 million; it has created programs and secured resources to enable poorer students to earn the Charter Oak degree; it has developed many new concentrations with related courses so a student can earn the complete degree online through Charter Oak; and it has become an important player in many workforce development efforts.

We recognize as we move forward that there are a number of characteristics of the College, our students and our graduates we do not want to change. We also recognize that the College is part of a constantly changing environment and there are many obstacles that must be addressed if the College is to continue to flourish.

In preparation for the development of a new strategic plan, and with the guidance of a strategic planning consultant, we reviewed recommendations from our recent NEASC accreditation visit; examined data regarding student demographics, previous marketing efforts, graduate and alumni survey results; and surveyed faculty, Board members and community stakeholders regarding their opinions of online learning, the quality of our academic programs, our use of technology and how we differentiate Charter Oak from other institutions.

We also engaged a marketing firm to conduct an audit and to assess our marketing operations and approaches, including current strategies to achieve matriculation increases. A major focus of the study was the effectiveness of institutional branding.

What we learned as we analyzed information from these varied sources is that our future efforts must sustain our:

- Flexibility and our accelerated pathway to degree completion;
- Satisfied graduates who spread the word about the College;
- Outstanding faculty who serve the institution on a part-time basis;
- Individualized student advisement model;
- Ability to quickly develop programs and courses to meet new workforce needs; and
- Competitive cost for earning a Charter Oak degree.

However, we also learned from these same sources that:

- We should offer graduate degrees.
- Majors are preferable to concentrations for some of our programs.
- More online courses should be available.
- An accelerated process for moving students from application to matriculation should be implemented.
- A more transparent process should be instituted describing procedures for moving from applicant to matriculated student to graduate.
- “Brand Recognition” needs to be a constant focus.
- Staffing and space issues must be addressed in order to keep up with College growth and assure both high staff morale and high quality customer service.

An analysis of the higher education landscape and the external environment presented the following issues:

- E-learning will continue to expand and innovative institutions of the 21<sup>st</sup> century will have cutting-edge online degree and certificate programs.
- Virtual colleges and the number of traditional colleges and universities offering online degrees also are growing in the marketplace.
- The Web will increasingly be an important place for students to find information about colleges and universities.
- Online learners will expect an array of online services to support their learning and for colleges to have up-to-date technology.
- The decline in the traditional age student in Connecticut and other states will cause more colleges and universities to look at the adult market.
- Time is becoming a precious commodity and “hypertasking” is pervasive.
- A college education is increasingly being pursued in a non-linear fashion.
- A higher proportion of students may need financial aid, job preparation and placement services.
- There will continue to be an emphasis in the U.S. workforce on lifelong learning and retraining to remain innovative and competitive in the global workplace.
- Labor market data presents some contradictions. Although from 2004 to 2014, job openings in the U.S. are projected to grow 13 percent, which comes out to 18.9 million more jobs over ten years, those jobs that require some sort of degree are expected to increase faster than those

that don't, jobs that require only on-the-job training or work experience will make up 55 percent of the total projected openings.

- Evolving demographics in the U.S. and Connecticut will include more minorities and immigrants, calling for interventions to increase high school graduation, college enrollment and college graduation rates, and more ESL instruction.
- Future funding for higher education will be dependant on performance and learning outcomes measurements.
- More women than men utilize online courses and this trend is expected to continue.
- Students and employers will want learning experiences that cross traditional content barriers and the boundaries of credit and non-credit courses.
- There will be a demand for continuous learning for seniors.

We gained a clearer picture of the College's major competitors by asking current students where else they had considered or applied before opting to matriculate at Charter Oak. We also asked applicants who did not matriculate if they had selected another institution and if yes, the name of the institution. Seven top competitors were identified. Five of Charter Oak's competitor institutions were non-traditional and all served the adult market.

An analysis of the seven top Charter Oak competitors pointed to the following:

- All have graduate programs.
- Five of the seven have residency requirements.
- Three have similar transfer policies to Charter Oak for credits from two-year institutions.
- All but one offer majors.
- Charter Oak is competitive in cost for in-state students but not with two of the competitors in the out-of-state market.

All of this information was reviewed by Charter Oak's Strategic Planning Steering Committee and the College's Board. It provided the foundation for the Framework for Planning.

# Charter Oak State College Blueprint for the Future

## Framework for Planning

### *Context for Planning*

As the economy and employment needs in our state and region continue to evolve, the demand for increasingly literate, highly skilled individuals with postsecondary education credentials, both at the undergraduate and graduate level, will increase commensurately. As the Internet becomes an evermore vibrant and vital medium for knowledge sharing, information management and commerce, distance learning through online coursework will become an increasingly important, sophisticated, and competitive realm of higher education.

Against this backdrop of a shifting educational landscape, Charter Oak State College is preparing and positioning itself to play a more critical role than ever in supporting the education and workforce development needs of Connecticut and the nation. It will do so by being flexible, innovative, proactive and opportunistic. At the same time, the College will remain steadfastly committed to maintaining the high quality of educational offerings and personalized customer service that distinguish Charter Oak; and it shall remain faithful to the fundamental goals of providing an accessible, affordable, alternative route to degree completion and helping adult learners succeed as students and in life.

### *Vision*

Five years from now, the College will be widely recognized in Connecticut and beyond as *a distance learning institution offering challenging and top-quality online instruction in a wide range of fields* for adults seeking to expand their minds or advance their careers, and as *a first-choice college for adult learners seeking an individualized, affordable and expeditious path to undergraduate degree completion and graduate degrees.*

Success and institutional strength will be evident in increased public awareness of and appreciation for Charter Oak's unique brand of educational excellence, expanded course offerings and degree programs, more matriculated students, a more diverse student body, more credits delivered and more degrees awarded, a larger role for faculty in the life of the College, cutting-edge technology supporting pedagogical needs and serving students, high overall student satisfaction levels, ongoing engagement with the College by alumni, new and expanding sources of earned and contributed income to support operations at the highest possible level of quality, new and adequate physical space for staff, high staff morale, and impressive success of graduates.

### *Key Challenges*

⇒ Adapt to the increase in distance learning competition from other higher education institutions serving the adult learner market and investing heavily in marketing to attract students;

- ⇒ Establish greater programmatic focus while also strategically expanding offerings – including more online distance learning course options, defined majors in specific fields where there is demand, and a graduate degree program – to meet identified needs;
- ⇒ Scale up and achieve enrollment growth without compromising the personalized attention and service Charter Oak is known for;
- ⇒ Raise the College’s profile and enhance its reputation so that it ceases to be considered a “hidden gem” in the state higher education system;
- ⇒ Secure funding to make it possible to invest in resources deemed critical to achieving our vision, and align resources, organizational structures and processes with strategic priorities;
- ⇒ Maintain the commitment to putting degrees within reach of people who cannot afford more traditional educational options.

### ***Strategic Imperatives and Key Goals for the Future***

It is imperative that we define, create and articulate a competitive advantage that resonates with key stakeholders, particularly prospective students. We must foster an environment and organizational culture that consistently attract and motivate staff as well as faculty members who share a commitment to the College’s unique mission, its students, and each other. In addition, the College must have sufficient resources – human, financial, and physical – to assure it is able to fulfill its mission and its potential effectively, efficiently, and with both quality and integrity.

Charter Oak will respond to these imperatives, address the key challenges it faces, and advance the College’s vision for the future by focusing attention and resources on achieving the following strategic goals:

- Enhance the College’s reputation as a distance learning entrepreneur and educational leader through more aggressive, strategic marketing and by drawing attention to “signature” academic programs and other competitive differentiators such as personalized, “high-tech-and high-touch” customer service.
- Strengthen the College’s academic program through initiatives focused on curriculum development and innovation, market segmentation, faculty engagement in the life of the College, and learning outcomes assessment.
- Increase the number of matriculations and course enrollments by extending the College’s market reach and penetration while maintaining programmatic and service quality
- Fortify a student-centered culture throughout the organization and create a strong sense of community among students, extending beyond graduation.
- Leverage the College’s technology infrastructure and capitalize on new technologies to support goals related to pedagogy and academic program, customer service, quality control, organizational effectiveness, and differentiation within the field of distance education.

- Strengthen the College's financial foundation through new sources of earned income, expanded fundraising, and increased support from the State to support key priorities.



# **Charter Oak State College Blueprint for the Future**

## The Plan

## Goal 1

**Enhance the College's reputation as a distance learning entrepreneur and educational leader through more aggressive, strategic marketing and by drawing attention to "signature" academic programs and other competitive differentiators such as personalized, "high-tech-and-high-touch" customer service.**

- 1.1 Fortify reputation as a provider of unique degree completion opportunities in the adult learner market.**
  - 1.11 Develop a comprehensive marketing plan and annually update the plan.
  - 1.12 Market the College as a degree completion program as well as a provider of online courses.
  - 1.13 Promote features of Charter Oak State College (COSC) that differentiate COSC from its competitors (such as aggregator of credits, six graduation a year, ability to start at anytime, and high-touch customer service).
  - 1.14 Use data-driven decisions to select effective marketing tools including web, radio, TV, print, etc.
  - 1.15 Market COSC information to visiting distance learning (non-matriculated) students.
  - 1.16
- 1.2 Expand and enhance Charter Oak State College's overall academic reputation**
  - 1.21 Highlight selected popular and highly effective programs (signature programs) where Charter Oak stands out among its peers and that signal the College's innovative, responsive approach to distance learning.
  - 1.22 Strategically market "signature" programs as pillars of academic excellence.
- 1.3 Expand public awareness and enhance the College's reputation within the New Britain, Greater Hartford and Connecticut communities.**
  - 1.31 Improve outreach and participation by staff in community events and activities.
  - 1.32 Utilize connections of Board members (BSAA and Foundation), alumni and "friends of the College" to expand community presence.
- 1.4 Enhance relationship marketing.**
  - 1.41 Utilize academic counselors, alumni, students and faculty, in addition to designated admissions and outreach staff, in recruiting and building relationships
  - 1.42 Build relationships with appropriate faculty and personnel in other colleges, particularly community colleges, to increase referrals to the Charter Oak program.
  - 1.43 Build a communication plan that includes more frequent contacts with prospective students.

## Goal 2

**Strengthen the College's academic program through initiatives focused on curriculum development and innovation, market segmentation, faculty engagement in the life of the College, and learning outcomes assessment.**

- 2.1 Modify and expand current offerings to respond to identified market demand and intensifying competitiveness pressures.**
  - 2.11 Develop majors in specified fields of study (e.g., psychology, sociology, child studies, business administration) as an alternate to earning a degree in individualized studies with concentrations in specific disciplines.
  - 2.12 Develop, gain approval for, and offer graduate-level studies and a Master's degree program.
  - 2.13 Develop additional credit and non-credit certificate programs.
  
- 2.2 Expand Charter Oak's role in meeting workforce development goals and leverage the College's ability to be flexible and efficient in developing high-quality programs, grounded in the liberal arts, that meet identified workforce needs.**
  - 2.21 Develop new programs and course offerings with wide appeal and workforce development impact.
  - 2.22 Promote majors in targeted workforce areas such as business administration and health care administration.
  - 2.23 Require program outcomes to include workforce development objectives.
  - 2.24 Utilize workforce development agencies, organizations and practitioners in program and curriculum development.
  - 2.25 Revisit the CCAP process, fee structure, and marketing strategy to enhance awareness and utilization.
  - 2.26 Develop a Connecticut teacher certification program.
  - 2.27 Work with State industry cluster groups to develop courses and /or programs to address the educational needs of the specific cluster workforce.
  
- 2.3 Establish and market a unique brand of Charter Oak State College online courses.**
  - 2.31 Maintain a functional learning management system (LMS) platform and frequently examine other LMS options for the future.
  - 2.32 Examine new technologies to distribute coursework.
  - 2.33 Maintain or improve online course quality and keep course shells up-to-date.
  - 2.34 Conduct frequent outcomes-based course evaluations to validate course quality and assess course functionality.
  - 2.35 Maintain and hire highly-qualified faculty and showcase their qualifications.
  - 2.36 Develop or employ a system to effectively review instructor performance.
  
- 2.4 Engage outstanding faculty and provide them with appropriate professional development and continuing support in order to integrate them into the Charter Oak community.**
  - 2.41 Regularly review faculty recruitment, retention, and evaluation processes.
  - 2.42 Utilize College staff as instructors when appropriate.
  - 2.43 Implement an online Faculty Development Resource Center.
  - 2.44 Enhance the roles and responsibilities of the Dean of Faculty, Associate Dean of Faculty,

and the committee chairs.

2.441 Provide mentoring to faculty.

2.442 Ensure academic integrity of programs.

2.45 Raise endowed funds to be able to attract guest faculty, eminent in their fields, to deliver web cast lectures and to participate in class discussions in related courses.

2.46 Dedicate staff and other resources to engage faculty in the Charter Oak community (via a speaker series, faculty awards program, publication of milestones, etc.).

**2.5 Integrate online library resources into the curriculum and learning requirements.**

2.51 Engage library consultant to assure library resources are connected with course offerings and to develop library curriculum resource packages for the faculty.

2.52 Encourage faculty to help students develop information literacy skills by requiring research-based assignments.

2.53 Provide training to assure faculty and students are proficient in the use of the online library resources.

**2.6 Utilize data-driven decision making to evaluate the course delivery system, and existing and future programs, courses and services.**

2.61 Redesign student evaluation process for teaching faculty including evaluation form and data collection and analysis.

2.62 Review graduation and alumni data collection process, including surveys, to ensure needed data is being collected.

2.63 Utilize marketing data and budget projections to guide program development.

2.64 Develop a data-driven process for determining if program and service goals are being met.

**2.7 Utilize data-driven decision making to measure achievement of student learning outcomes.**

2.71 Periodically review general education, concentration and course outcomes to ensure that they are current and are being met.

2.72 Implement measurement tools to assist in evaluating learning outcomes.

2.73 Develop and implement an alternative to the current Concentration Plan of Study (CPS) and Academic Autobiography processes to ensure student outcomes are being met.

### Goal 3

**Increase the number of matriculations and course enrollments by extending the College's market reach and penetration while still maintaining programmatic and service quality.**

#### **3.1 Streamline the matriculation process and implement strategies to promote earlier decision making of potential matriculating students.**

- 3.11 Create policies and processes that provide an easy transition from prospect to accepted applicant to matriculating student.
- 3.12 Ensure transfer credit evaluations are delivered in a timely, meaningful format
- 3.13 Consider incentives (financial and other) for early matriculation.

#### **3.2 Implement a more formalized communications plan for applicants.**

- 3.21 Engage current students and alumni in new student recruitment.
- 3.22 Seek appropriate opportunities to engage faculty and staff as ambassadors to the College in the recruitment process.

#### **3.3 Enhance marketing strategies to increase matriculations and online course enrollment.**

- 3.31 Emphasize availability of student financial aid as a strategic enrollment tool.
- 3.32 Collaborate with the community colleges to access potential baccalaureate students enrolled in community college online courses.
- 3.33 Increase marketing initiatives targeted at "visiting" (non-matriculated) students.
- 3.34 Market COSC in work settings to "college drop-outs".
- 3.35 Continue to engage in program development activities that attract new and diverse populations to the College.
- 3.36 Broaden the scope of web advertising.
- 3.37 Provide an interactive sample of a distance learning course on the College website for pre-enrollees.
- 3.38 Emphasize that Charter Oak is a "State" institution in our branding efforts.

#### **3.4 Utilize technology to enhance growth while maintaining high-touch customer service.**

- 3.41 Continuously improve search engine optimization.
- 3.42 Integrate technology that promotes and supports interaction to build community among faculty, staff, and students.
- 3.43 Standardize COSC information such as policies, resources, syllabi, faculty biographies, etc. to allow for cross-departmental use (i.e., COSC website, course shells, advertising, marketing, etc.).
- 3.44 Define metrics to measure the effectiveness of actions involving technology and its impact on high-touch services.

#### **3.5 Increase student access and attract new students by considering different methods to help students fund their education.**

- 3.51 Assess feasibility of non-term or non-standard term student financial aid to allow for more flexibility in student schedules and Student Financial Aid (SFA) disbursement.

3.52 Assess potential and cost of providing veteran fee waivers to Connecticut students.

**3.6 Advance initiatives to promote enrollment, retention and graduation of underrepresented minority students.**

3.61 Conduct targeted outreach activities with corporate diversity offices and through appropriate community college channels.

3.62 Ensure that a diverse student body is portrayed in all marketing efforts.

3.63 Continue to secure funding for the Women in Transition and CT WAGE programs.

3.64 Seek out additional sources of funding to help us achieve student diversity goals as identified in the State's *Strategic Plan to Promote the College Access and Success of Underrepresented Minority Students*.

3.65 Monitor progress of achieving goals of the BSAA Affirmative Action Plan.

3.66 Position the College as a viable degree-completion option for immigrants presenting college level credits/degrees from foreign countries.

3.67 Seek funding to develop online ESL course.

## Goal 4

**Fortify a student-centered culture throughout the organization and create a strong sense of community among students, extending beyond graduation.**

- 4.1 Successfully deploy the new student information system and make its ongoing effectiveness as a service and support for students a top priority.**
  - 4.12 Create an online feedback tool to evaluate web based student services/processes.
  - 4.13 Include a training session on JICS (web portal) in the online orientation.
  - 4.14 Dedicate staff to promote awareness and use of JICS and to keep content fresh and purposeful.
  - 4.15 Provide augmented help desk support.
  - 4.16 Require all staff to be familiar with all Jenzabar modules by providing initial and ongoing training.
  
- 4.2 Strengthen the advising and student support processes.**
  - 4.21 Develop system to assure regular contact with every student.
  - 4.22 Design technology to provide more support.
  - 4.23 Investigate addition of career “center.”
  - 4.24 Evaluate academic progress of underrepresented minority students. Develop and supply needed interventions to increase retention and graduation.
  
- 4.3 Build and maintain a faculty and staff that are committed to Charter Oak’s mission and reflect commitment to student support in organizational alignments and staffing levels.**
  - 4.31 Engage staff committees in the policy making process and encourage all committees to consider the impact of recommendations on the student experience.
  - 4.32 Share the successes of our students regularly with our various constituents – staff, alumni, faculty, and students – utilizing internal and external communication pieces.
  - 4.33 Implement a broader recognition system that acknowledges faculty/staff accomplishments throughout the year.
  - 4.34 Develop mission-driven orientation and ongoing professional development opportunities.
  - 4.35 Create a mechanism to evaluate the existing organizational structure and staffing levels of the College on an on-going basis and make recommendations for change as needed.
  - 4.36 Engage Core and/or DL faculty during the summer for special projects or curriculum work.
  
- 4.4 Implement initiatives designed to enhance interaction between staff and students, between students and technology, between faculty and students, among students and their peers, and among alumni, as well as between alumni and students.**
  - 4.41 Improve ways various communities – faculty, students, and alumni – can connect with each other and the institution including holding a major event each year for staff, faculty and possibly students.
  - 4.42 Enhance communication publications targeting current students and alumni (*Update, Connections*) allowing for richer, fuller content.
  - 4.43 Develop an internal communication mechanism for staff and faculty.
  - 4.44 Utilize website and other electronic media in addition to print material to showcase accomplishments of faculty, alumni, and staff.
  - 4.45 Increase faculty and alumni participation from the student point of entry through

graduation by involving them in open-houses, online chats and in the communication plan.

4.46 Create more opportunity for faculty and staff to interact, e.g., invite faculty to staff meetings on a rotating basis and have staff do presentations at faculty meetings.

4.47 Create a dedicated alumni affairs office.

4.48 Deploy an alumni database.

**4.5 Secure a significantly larger building to address current space-related operational inefficiencies and to ensure the ability to meet the expectations and needs of an expanding student body.**

4.51 Secure funding for the design and construction of a new building based on results of completed space study.



## Goal 5

**Leverage the College's technology infrastructure and capitalize on new technologies to support goals related to pedagogy and academic program, customer service, quality control, organizational effectiveness, and differentiation within the field of distance education.**

- 5.1 Make more services available to students online via the web and other technologies.**
  - 5.11 Establish baseline of current services being delivered by online institutions through survey of students, peer institutions and staff, with a goal of understanding the latest trends in technology as they relate to delivery of services and course content to students.
  - 5.12 Develop a methodology for determining the highest priority projects based on need, potential benefit and cost.
  - 5.13 Evaluate technologies that increase productivity and efficiency.
  - 5.14 Implement priority projects and assess their impact.
  
- 5.2 Assure that all staff and faculty are appropriately trained to maximize effective use of technologies for instruction and support in order to improve services and reduce overall costs.**
  - 5.21 Establish baseline of expected technology skills for all staff and have staff self-report whether they have these skills.
  - 5.22 Review job descriptions and add technological competencies where appropriate.
  - 5.23 Encourage managers to work with their staff to include technology training goals when appropriate.
  - 5.24 Include technology training as part of new technology initiatives.
  - 5.25 Develop a library of online training modules for staff and faculty.
  - 5.26 Develop a faculty online instruction certification program.
  - 5.27 Establish users group to assure technologies meet user needs and are being fully deployed.
  
- 5.3 Maximize the use of new technological tools and knowledge about pedagogy to enhance course design and learning outcomes.**
  - 5.31 Keep current regarding the latest information pertaining to instructional technology and pedagogy.
  - 5.32 Provide instructional design services for faculty to improve use of technology and pedagogy.
  - 5.33 Implement tools to facilitate communication and interaction between faculty including an enhanced Faculty Development Resource Center site.
  - 5.34 Monitor student engagement in courses and provide support for both matriculated and visiting students.
  
- 5.4 Continue to invest in technology infrastructure to assure the College maintains a leadership role in the delivery of online learning.**
  - 5.41 Maintain awareness of the newest technologies, software, hardware, and services.
  - 5.42 Develop a technology plan to continue to improve the College's technology infrastructure based on best practices and projections of the future.

- 5.43 Continue to collaborate with the CT Distance Learning Consortium (CTDLC), when appropriate, as a cost-effective means to providing up-to-date technology infrastructure and support.
- 5.44 Seek Board for State Academic Awards and legislative approvals to ensure sufficient capital and operating dollars to support the plan.

**5.5 Utilize technologies to decrease the distance in distance education.**

- 5.51 Implement independent voice over internet protocol (VOIP) telephone system with converged messaging to allow COSC staff to support students from anywhere and to enhance the caller's experience.
- 5.52 Utilize web technologies to offer synchronous interaction through video, audio, screen sharing, chat and document workspaces.
- 5.53 Investigate how social networking model can be integrated into the life of the College.
- 5.54 Migrate all staff users to laptop equipment.
- 5.55 Evaluate appropriate level and timeliness of helpdesk support including need for 24x7 access.
- 5.56 Create a new position "Information Ombudsman" providing a single point of contact for student support including access to information and technology resources.
- 5.57 Explore value and costs of implementing a toll free telephone number to be used as a marketing tool and to make it easier for students living at a distance from the College to interact with their academic counselors.

## Goal 6

### **Strengthen the College's financial foundation through new sources of earned income, expanded fundraising, and increased support from the state to support key priorities.**

- 6.1 Expand mutually beneficial public-private partnerships with organizations whose goals are compatible with Charter Oak State College's.**
  - 6.11 Develop additional corporate partnerships with businesses offering tuition reimbursement based on the Aetna model or on another mutually agreed upon approach.
  - 6.12 Develop specific courses or programs to meet the needs of new partners.
  - 6.13 Expand efforts to review corporate training programs for credit.
  
- 6.2 Grow the endowment and increase the flow of funds from the Charter Oak State College Foundation to the College's operating fund.**
  - 6.21 Work with the Foundation to increase fundraising including corporate and individual gifts and special events.
  - 6.22 Assure closer working relationships between business development, government relations and the COSC Foundation and alumni activities.
  
- 6.3 Integrate alumni into College wide activities.**
  - 6.31 Increase staff support to strengthen the Alumni Association.
  - 6.32 Utilize alumni (in-state and out-of-state) for outreach and fundraising activities.
  
- 6.4 Expand revenue by seeking grant opportunities that address student needs and/or build on COSC's existing areas of programmatic strength and distinction.**
  - 6.41 Provide staff to support and coordinate grant research and preparation.
  - 6.42 Strengthen the grant management process.
  
- 6.5 Reexamine fee structure.**
  - 6.51 Explore fee changes that maximize revenue while considering competitors and maintaining affordability.
  
- 6.6 Maximize organizational and administrative structures to provide for an efficient and cost-effective work environment.**
  - 6.61 Assure that decisions are data-driven and are revenue positive, provide necessary student support or lead to an enhanced image for the College.
  - 6.62 Periodically review relationship with the CTDLC to assure Charter Oak is deriving maximum benefit.

# Charter Oak State College Blueprint for the Future

## Organizing for Success

Early in the planning process, members of the President's Cabinet participated in a survey, conducted by the SOS Consulting Group, to solicit staff input regarding aspirations, challenges, competitors, impediments to progress, goals and priorities for Charter Oak State College's future. In response to the question, "Based on your own perspectives and experience regarding Charter Oak State College, what have been the impediments to achieving identified goals," there were a number of responses that clustered around staffing and space limitations, fragmented or unclear responsibilities, and departmental alignment.

This theme was repeated in the Organizational Structure Report completed by SEM Works in May of 2007 as part of the Charter Oak marketing study. The report offered recommendations regarding organizational restructuring to position Charter Oak so it could achieve a sustainable competitive advantage, with a key goal being enhancing institutional visibility and awareness.

In September, the executive staff met off site to consider organizational questions relating to effectiveness and operational challenges associated with the current structure. In addition to addressing these questions, the senior group considered whether, and to what extent, the College's resources (human and financial) were aligned appropriately to achieve the Strategic Plan's vision and priorities. The executive staff concluded that:

- Review of the Strategic Plan's priorities suggests resources will be required in the following areas:
  - Alumni relations staff
  - Marketing staff and budget
  - Admissions staff (with eventual ripple effect on Registrar and Academic Advising)
  - Distance learning staff
  - Fundraising staff
  - Support staff
- The Strategic Plan's focus on priority goals in the areas of marketing and fund development are not adequately reflected in the College's organizational structure.
  - A single senior staff member is responsible for admissions, marketing, alumni relations, and fundraising. This was deemed an illogical bundling of responsibilities, in part because there is an insufficient ability to focus adequately on all of them and in part because different skills and experience are required to be an effective enrollment/admissions officer than are required to be an effective chief advancement officer.
  - Fundraising seems to be an "add on" responsibility rather than a primary, strategic role for someone at the College.

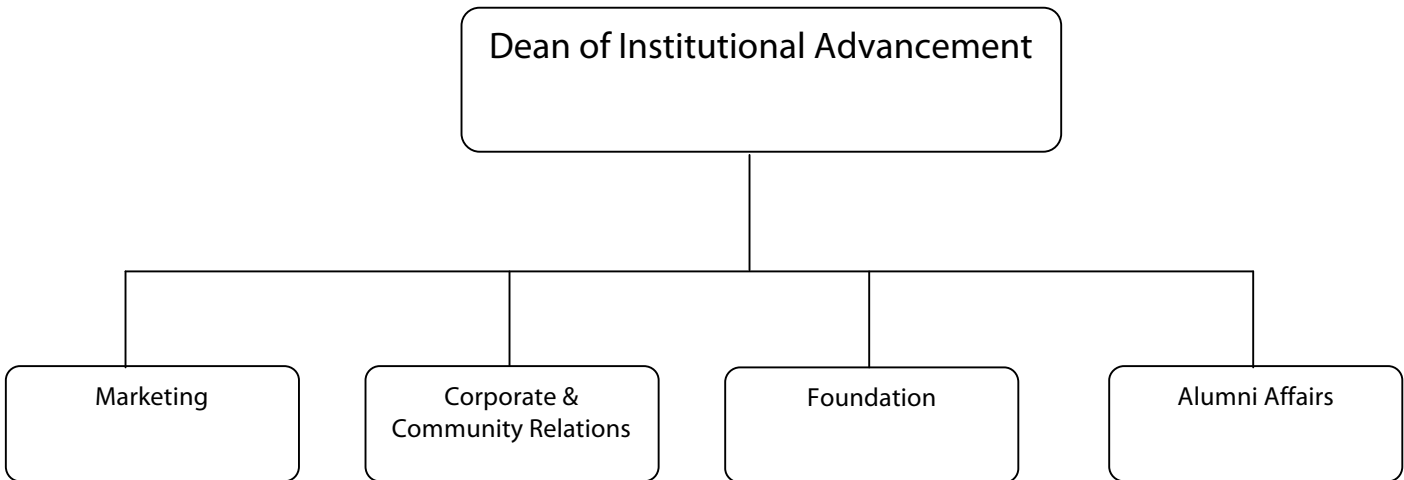
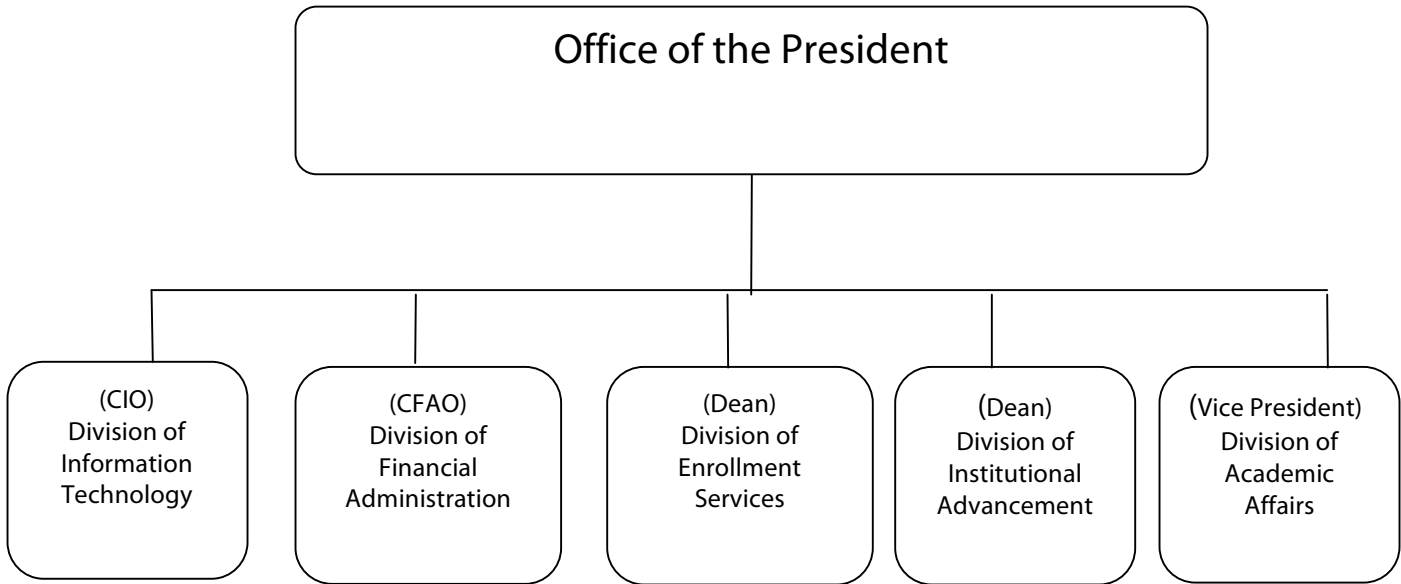
In the FY 2008 budget, a number of staff positions have been added to address some of the issues discussed at this important September meeting. Some positions have been filled and others will be

by the end of the fiscal year: these include a Director of Marketing (FT), an Internet Marketer (FT), a Director of Institutional Effectiveness (FT) and additional administrative support.

These new staff positions should be a first step in helping the staff that is currently “spread too thin” address many of the ambitious goals and strategies included in the Strategic Plan. However, in addition there is a need for some structural change in the organization to assure a sustainable competitive advantage. Although as stated in the SEM Report, “there may exist many possible iterations of the organizational structure within Charter Oak State College,” the President is recommending the following (as reflected in the attached organizational charts) based on the deliberations of the management team regarding structural alignment to achieve strategic priorities:

- Creation of a new division to be called Institutional Advancement to include marketing, fundraising (the Foundation), alumni affairs, and corporate and community outreach. This division will be responsible for an integrated, comprehensive external relations program.
- This new structure should be implemented following the approval of the Strategic Plan with the Director of Marketing and the Director of Corporate and Community Affairs reporting to the President. Once a new President has been appointed and has assumed office, the Dean of Institutional Advancement should be appointed.
- Admissions and financial aid would reside in a single division headed by the Dean of Enrollment Services, reflecting that financial aid needs to be used increasingly as a strategic enrollment tool.
- Other changes should be made in structure and staffing as the plan is implemented and the impact of the Jenzabar “Go Live” is discerned. These changes should consider plan priorities, as well as the potential for creating additional resources.

# Proposed Organization



# Charter Oak State College Blueprint for the Future

## Performance Metrics

Success and institutional strength will be evident through some of the metrics noted below that will be reported each July in the annual plan update:

- increased public awareness of and appreciation for Charter Oak's unique brand of educational excellence
  - colleges in the admissions overlap group (inquiries)
  - geographic representation in inquiry base
  - perceptions as indicated in survey on non-matriculating admits
  - number of total inquiries
  - number of DL enrollments
  - other market-based data re: perceptions and awareness/visibility
  - number of requests for partnerships and number of total corporate partnerships
- expanded course offerings and degree programs
  - number of courses and degree options indicated in catalog
- more matriculated students, more credits delivered and more degrees awarded
  - application → matriculation conversion rate
  - number of matriculations (new, total)
  - number of course enrollments
  - number of credits delivered
  - number of degrees awarded
  - number of students receiving financial aid
- a larger role for faculty in the life of the College
  - participation in workshops, webinars, on-line chats, etc.
  - communications between faculty and students, faculty and staff
  - participation in graduation ceremony
  - participation in student and alumni activities
- cutting-edge technology supporting pedagogical needs and serving students
  - implementation checklist tied to strategic plan initiatives
- high overall student satisfaction levels
  - qualitative data from pre-graduation survey (annual)
  - qualitative data from drop-out survey (periodic)
  - data from National Survey of Student Engagement
  - number of/trends in withdrawals (deactivated students)
  - course evaluations by students

- ongoing engagement with the College by alumni
  - Alumni Fund participation rate
  - number of alumni events hosted and alumni participation levels
  - number of alumni serving as admissions ambassadors
  
- new and expanding sources of earned and contributed income to support operations at the highest possible level of quality
  - total ESA revenues
  - level of state support
  - corporate and foundation (grant) support
  - dollars raised from alumni
  - total support from COSC Foundation
  - revenues derived from partnerships
  - third-party payments
  - number of CCAPs and revenues derived
  
- new and adequate physical space for staff
  - square feet available
  
- high staff morale
  - qualitative data from employee survey conducted periodically after baseline established
  
- impressive success of graduates
  - number of COSC graduates pursuing graduate studies
  - earnings growth (pre-enrollment vs. one year after graduation)
  - professional advancement trends (alumni survey annually)



# Appendices

# Charter Oak State College Blueprint for Tomorrow

## Planning Process

The planning process to develop a Strategic Plan for the College was initiated in January 2007 and concluded with Board approval of the plan in November 2007 the following steps were taken over a 10-month period:

- Board approves planning process to be led by a Steering Committee broadly representative of the College. January 2007
  
- Consultant engaged (SOS Consulting Group). January
  
- Steering Committee meets as a whole and in subcommittees throughout the 11-month planning process to guide the various stages of plan development with attention to research findings and input from various stakeholders. January-November
  
- Input regarding issues, goals and aspirations solicited via survey of the following key constituents: February-March
  1. Board for State Academic Awards
  2. Cabinet and members of the Steering Committee
  3. Faculty serving on the Academic Council
  4. Community stakeholders.
  
- Online surveys of a sampling of people who inquired about the College and never applied and of those who were accepted but never enrolled. The survey was designed to identify who comes to the College and why, as well as Charter's Oak's major competitors. February-March
  
- Review of graduate and alumni surveys to identify institutional strengths and weaknesses. March
  
- Analysis of top seven identified competitors as to what they offer, how their programs are delivered, how students are served, and the cost of education. March
  
- Review of pertinent higher education literature for information on higher education trends and projections regarding the future. Ongoing

- Steering Committee adopts draft vision statement. March
- Staff-wide meeting to discuss vision and preliminary goals. March
- Board approves *Framework for Planning* document (vision, challenges and goals). May
- SEMS Works completes marketing study and submits recommendations. June
- Steering Committee identifies strategies to achieve goals. June-September
- Steering Committee adopts criteria and process for setting priorities. September
- Staff views regarding priorities solicited via online survey. September
- Steering Committee determines implementation priorities. September
- Meetings held to review and react to strategies and initiatives with:
  1. Staff
  2. Community stakeholders
  3. Faculty
 September - October
- Board approves Strategic Plan and reviews year-one implementation plans. November
- Annual updates to be presented to the Board. July of each year

## Steering Committee Members

**Dr. Merle W. Harris**

President, Charter Oak State College

**Dr. Shirley Adams**

Vice President, Academic Affairs

**Ronald Banks**

Associate Director, Corporate Enrollment Services

**Robert Frederick**

Assistant Director, Admissions

**Carmel French**

Financial Aid Counselor

**Jason Jakubowski**

Director, Business Development

**Rowena McGoldrick**

Associate Manager, Personnel & Business Services

**John Padilla**

Member, BSAA

**Lori Pendleton**

Director of Admissions

**Dr. Barry Vroeginday**

Director, Distance Learning Programs

**Clifford Williams**

Chief Financial and Administrative Officer

**Eric Zematis**

Director, Management Information Systems

## Community Stakeholders

**Dr. Elizabeth Beaudin**

Director of Nursing and Workforce  
Initiatives  
CT Hospital Association

**Mr. Tim Branner**

Manager, Workforce Diversity &  
Human Resources  
Otis Elevator Company

**Ms. Elizabeth Brown**

Legislative Lobbyist  
Commission on Children

**Mr. Joseph Carbone**

President & CEO  
The Workplace, Inc.

**Mr. Rob Keating**

Director of Workforce Development and  
Knowledge Economy Policy  
Office of Workforce Competitiveness

**Ms. Marie O'Brien**

President  
CT Development Authority

**Ms. Joyce Petrella**

Hartford Life

**Ms. Judith Resnick**

Deputy Director, Education Fund  
CBIA

**Mr. Anthony Rescigno**

President  
New Haven Chamber

**Lt. Clifford Thermer**

CT State Police Academy

**Mr. Calixto Torres**

Executive Director  
CT Puerto Rican Forum

**Mr. John Whitcomb, SPHR**

President, ImEdge Technology

**Ms. Susan Winkler**

Insurance & Financial Services Cluster  
Metro Hartford Alliance