PURPOSE
Administrative Assessment is an ongoing process that allows a unit to evaluate and – where necessary – improve its programs, services and operations. Assessment is a systematic approach to demonstrate continuous improvement in programs, services and operations. This template is to be used when creating your assessment plan. Assessment plans should be measurable, meaningful and manageable.

UNIT MISSION STATEMENT
The Office of College Advancement, in collaboration with the Potsdam College Foundation and SUNY Potsdam Alumni Association, engages alumni, parents and friends in the mission and future of SUNY Potsdam. Advancement educates about the successes and needs of SUNY Potsdam and offers ways to financially secure the institution’s future. Our office engages alumni, parents, friends as volunteers and helps to plan their philanthropy at Potsdam. Finally, the Advancement offices steward the time and gifts entrusted to us to ensure the academic excellence of the College and the success of our students.

GOAL #1: Pursue growth on various fronts, including; growth in Foundation funds and fundraising, alumni and other constituent volunteers, community and affinity connections, and recruitment/retention for the College.

GOAL #1 - WHAT INSTITUTIONAL PRIORITY AREA(S) DOES THIS GOAL LINK TO?
(Select all that apply)
- Retention and Enrollment
- Financial Stability and Analysis
- Academic Programs and Planning
- Strengthening Community Connections
- Diversity, Equity, Inclusion, & Belonging

Briefly describe the link between goal #1 and the institutional priority area(s) selected.
This goal touches every single Institutional Priority. In order of most direct linkage:
1. Financial... more fundraising and volunteers helps the college financially.
2. Retention... scholarships and other funding directly support students and help them thrive.
3. Academic... foundation funds and volunteers directly support academic strength.
4. Strengthening community... our structures are often the most visible engagement for the college.
5. Diversity... many of our funds and volunteers support DEI&B work on campus.
GOAL #1 – DESIRED OUTCOMES AND OBJECTIVES

1a. Increase cash-in fundraising (cash in-the-door per year) to $3.1M for FY22-23
1b. Increase documented gift agreements fundraising (documented multiyear pledges per year) to $4M
1c. Grow overall endowment to over $45M
1d. Increase endowment support of unrestricted support to college
1e. Evaluate unrestricted “reserve” support for vital interest of the college (financial stability; retention and enrollment)
1f. Partner with alumni and volunteers to increase enrollment and retention

GOAL #1 – ASSESSMENT METHODS, MEASURES, AND TARGETS

1a1. Method = foundation business office accounting to provide FY-end “cash-in” report; Target = $3.1 million+ in “cash-in.”
1b1. Method = advancement services office to provide FY-end “pledges received” report; Target = $4 million+ in pledges for the next 5 years
1c1. Method = FY end audit; Target = overall endowment balance at $45 million+
1d1. Method = foundation business office accounting to provide multi-year analysis of unrestricted support to college from endowment; Target = Increase in total unrestricted support from endowment
1d2. Method = survey college president and president’s council about unrestricted support; Target = Response from survey indicates sufficient support
1e1. Method = minutes from foundation committee and board meetings; Target = robust discussion, ideation, and execution of actions to take steps to utilizing unrestricted “reserve” funds, as evidenced in meeting minutes
1f1. Method = document engagements where alumni/volunteers support enrollment/retention efforts; Target = five (5) or more substantial engagements (such as, phonathons to potential students; letter-writing campaigns to potential students; in-kind donation of marketing work; etc.)
1f2. Method = measure number of potential students reached through alumni/volunteer efforts; Target = 1,000+ potential students reached

GOAL #2: Engage important college constituencies, including alumni, donors, parents, employees, and friends, to increase support for the institution and our current students.
<table>
<thead>
<tr>
<th>GOAL #2 - WHAT INSTITUTIONAL PRIORITY AREA(S) DOES THIS GOAL LINK TO? (Select all that apply)</th>
<th>Briefly describe the link between goal #2 and institutional priority area(s) selected.</th>
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| ☒ Retention and Enrollment                                                                                           | This goal touches every single Institutional Priority. In order of most direct linkage:  
| ☒ Financial Stability and Analysis                                                                                   | 1. Strengthening community... our engagement structures fuel our community support.  
| ☒ Academic Programs and Planning                                                                                     | 2. Retention... our volunteers directly participate (as appropriate) in recruitment and retention efforts.  
| ☒ Strengthening Community Connections                                                                                 | 3. Diversity... we seek diverse volunteers who in-turn help us recruit and retain diverse students and employees.  
| ☒ Diversity, Equity, Inclusion, and Belonging                                                                         | 4. Financial... greater engagement leads to more fundraising, volunteers, and advocacy for public funding.  
|                                                                                                                       | 5. Academic... volunteers advise and support our academic programs. |

GOAL #2 – DESIRED OUTCOMES AND OBJECTIVES

2a. Develop and implement specific structure for alumni and volunteers to engage in meaningful supportive activities  
2b. Maximize programming which allows alumni and community to participate in life of the campus  
2c. Increase collaboration between Advancement and College Communications  
2d. Develop communications plan with clear, targeted messaging for how alumni/volunteers can support the college  
2e. Ensure proper gift acknowledgement through implementation of stewardship matrix plan  
2f. Report and share donor impact reports in timely manner

GOAL #2 – ASSESSMENT METHODS, MEASURES, AND TARGETS  
Reminder: These should be aligned with the objectives being assessed. Also, consider using a combination of direct and indirect measures. Be sure to include specific targets.

2a1. Method = VP audit whether a) plan was set up (Y/N) and b) if implemented (Y/N, via selective audit); Target = Plan both created and implemented  
2b1. Method = Measure alumni participation in events and volunteer opportunities; Target = 10% increased engagement over last FY  
2c1. Method = Regular meetings between relevant stakeholders in Adv. / Comm.; Target = Yes, meetings set up and held  
2d1. Method = Communications plan setup and evaluated by VP; Target = Plan set up and evaluated to be robust by VP  
2e1. Method = Report from Advancement services on gift acknowledgement; Target = Over 90% of gifts acknowledged according to plan  
2f1. Method = Report from Advancement Services on donor impact reports; Target = 100% of reports sent by end of calendar year
**GOAL #3:** Process financial, account, data, and workflows efficiently and effectively.

**GOAL #3 - WHAT INSTITUTIONAL PRIORITY AREA(S) DOES THIS GOAL LINK TO?**  
(Select all that apply)

- [ ] Retention and Enrollment  
- [ ] Financial Stability and Analysis  
- [ ] Academic Programs and Planning  
- [ ] Strengthening Community Connections  
- [ ] Diversity, Equity, Inclusion, & Belonging

Briefly describe the link between goal #3 and institutional priority area(s) selected.

This goal helps the Foundation, College, and students maintain financial stability and helps us analyze our past, current, and future financial trajectories.

**GOAL #3 – DESIRED OUTCOMES AND OBJECTIVES**

3a. Complete Banner Finance implementation  
3b. Cross-train on financial and data duties  
3c. Create and execute a data needs punch list  
3d. Create standards of organization for staff

**GOAL #3 – ASSESSMENT METHODS, MEASURES, AND TARGETS**

3a1. Method = VP determination if implementation was done (Y/N); Target = implementation completed  
3b. Method = Hold trainings on specific data and financial duties; Target = 6+ trainings completed on specific finance/data duties  
3c. Method = Data needs punchlist; Target = List created and 80%+ completed from original list by FY end  
3d. Method = Standards of organization “handbook” created (Y/N); Target = Handbook created