

**SUNY Potsdam  
Administrative Unit  
Assessment Plan**

Administrative Unit: College Advancement

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Assessment Cycle: 22/23 – 27/28

**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.

<p><b>GOAL #2 - WHAT INSTITUTIONAL PRIORITY AREA(S) DOES THIS GOAL LINK TO?</b> (Select all that apply)</p> <p><input checked="" type="checkbox"/> Retention and Enrollment</p> <p><input checked="" type="checkbox"/> Financial Stability and Analysis</p> <p><input checked="" type="checkbox"/> Academic Programs and Planning</p> <p><input checked="" type="checkbox"/> Strengthening Community Connections</p> <p><input checked="" type="checkbox"/> Diversity, Equity, Inclusion, and Belonging</p>	<p><b>Briefly describe the link between goal #2 and institutional priority area(s) selected.</b></p> <p>This goal touches every single Institutional Priority. In order of most direct linkage:</p> <ol style="list-style-type: none"> <li>1. Strengthening community... our engagement structures fuel our community support.</li> <li>2. Retention... our volunteers directly participate (as appropriate) in recruitment and retention efforts.</li> <li>3. Diversity... we seek diverse volunteers who in-turn help us recruit and retain diverse students and employees.</li> <li>4. Financial... greater engagement leads to more fundraising, volunteers, and advocacy for public funding.</li> <li>5. Academic... volunteers advise and support our academic programs.</li> </ol>
<p><b>GOAL #2 – DESIRED OUTCOMES AND OBJECTIVES</b></p> <p>2a. Develop and implement specific structure for alumni and volunteers to engage in meaningful supportive activities</p> <p>2b. Maximize programming which allows alumni and community to participate in life of the campus</p> <p>2c. Increase collaboration between Advancement and College Communications</p> <p>2d. Develop communications plan with clear, targeted messaging for how alumni/volunteers can support the college</p> <p>2e. Ensure proper gift acknowledgement through implementation of stewardship matrix plan</p> <p>2f. Report and share donor impact reports in timely manner</p>	
<p><b>GOAL #2 – ASSESSMENT METHODS, MEASURES, AND TARGETS</b></p> <p>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.</p> <p>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</p> <p>2b1. Method = Measure alumni participation in events and volunteer opportunities; Target = 10% increased engagement over last FY</p> <p>2c1. Method = Regular meetings between relevant stakeholders in Adv. / Comm.; Target = Yes, meetings set up and held</p> <p>2d1. Method = Communications plan setup and evaluated by VP; Target = Plan set up and evaluated to be robust by VP</p> <p>2e1. Method = Report from Advancement services on gift acknowledgement; Target = Over 90% of gifts acknowledged according to plan</p> <p>2f1. Method = Report from Advancement Services on donor impact reports; Target = 100% of reports sent by end of calendar year</p>	

**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

