A planning, management, and evaluation (PME) system is described as it is used by North Central Technical College to identify institutional objectives and assess the degree to which the objectives are being met. After introductory material discussing the need to determine the impact of postsecondary education on the well-being of society as a whole, the report outlines the three steps in the planning phase of the PME system: (1) determining planning assumptions concerning the probable future characteristics of the community, the student body, and the institution; (2) determining institutional and departmental goals, i.e., desired results over three to ten years; and (3) defining measurable outcomes of short-term (one-year) efforts. This section of the report identifies the various categories of assumptions, goals, and objectives and discusses their interrelationship. Next, the report examines the three-year PME cycle, which calls for initial planning during the first year, implementation of the plan during the second year, and evaluation during the third year to determine the extent to which objectives have been met. The report concludes with a discussion of contemporary demands for accountability, which require that the impact of higher education on the society, as well as the individual, be measured. Forms used to measure the achievement of stated objectives are appended. (JP)
SHAPEING SOCIETY THROUGH OUTCOMES:
MEASURING OUTPUT OF THE COLLEGE

by
Warren H. Groff, Ed. D.
Vice President for Academic Affairs
North Central Technical College
Mansfield, Ohio 44901

presented at the Convention of
The American Association of Community and Junior Colleges
April 21, 1981
Institutions of postsecondary education are "of society". That is to say, they are created to fill a role that society has deemed necessary as it relates to its well being. Viewed in this light, postsecondary education takes its place alongside elementary and secondary education, human service, housing, transportation, and government as it attempts to impact on the quality of life. During recent years, however, many Americans have become concerned about the "return" of their investment in the college experience. Demands for accountability from tax payers, primarily through state legislatures, and the rising cost of tuition provide cause to ask, "What are the benefits of college for individuals and the returns to society in general?"

Several researchers have presented data about the benefits of college for individuals and returns to society in general. What is needed are research designs and methodologies that go beyond the benefits to individuals and include measurements of (1) "outputs" of institutions and (2) "impacts" on society, casual relationships of "significant differences" between the investment in postsecondary education and the quality of life. Furthermore, the models must include a clear demonstration of the benefits of collegiate and private and public sector interagency cooperation. To do this, institutions need a way (1) to diagnose the needs of society of which they are a part, (2) to translate selected needs of society into institutional goals and objectives, and (3) to evaluate the extent to which an institution reaches stated goals and objectives. An institutional planning process is described along with a model for evaluating the extent to which the college is making progress on stated goals and objectives.

In 1973, Dr. Edmund J. Gleazer, Jr., President of the American Association of Community and Junior Colleges, made the following statement:

The community college that defines itself as a community-based, performance-based, postsecondary institution will have four basic continuing objectives:

1. Current, accurate, and comprehensive information about the community and how the institution is serving its community.

2. Access to information that enables the college to develop its human resources consistent with national needs and trends.

3. A comprehensive plan expressed in terms that can be understood and supported by the community.

4. The ability to justify its need for resources and to demonstrate that they have been used effectively.


As I began to work on the outline of this paper, it seemed logical to build it around four limited, but achievable objectives:

1. To present a theoretical framework of the relationship of postsecondary education to society and the need to have a method to evaluate how an institution functions.

2. To review the Planning, Management, and Evaluation (PME) system at North Central Technical College.

3. To discuss the method of evaluation used in the NCTC-PME system, selected data sources and selected results.

4. To present perspectives about the educational and scientific importance of the study.

THEORETICAL FRAMEWORK

Institutions of postsecondary education are "of society." That is to say, they are created to fill a role that society has deemed necessary as it relates to its well being. Viewed in this light, postsecondary education takes its place alongside elementary and secondary education, human services, housing,
transportation, and government as it attempts to impact on the quality of life. The outcomes of these interactive relationships, which occur in a dynamic as opposed to a static context, can be described in terms of the output of the independent variable (postsecondary education) and/or the impact on the dependent variable (society/quality of life). A model to evaluate institutional processes is needed as a first step of this design. A multi-year design is needed to begin to mesh output and impact.

THE PLANNING, MANAGEMENT, AND EVALUATION SYSTEM

In Fall 1977, North Central Technical College made a commitment to comprehensive institutional planning. The College examined numerous planning models from private and public regional universities and two-year colleges. The best models for planning specified assumptions on which to base subsequent planning before setting goals and objectives. The College defined the term "assumption" and generated a list of categories for arraying assumptions. The definition of assumption is as follows:

An assumption is a proposition describing future conditions, some of which the institution has little control over. The level of certainty assigned to an assumption determines the level of precision it is allowed in subsequent planning. The greater the uncertainty about the assumption the greater must be the range of flexibility/hedging/options the institution retains against the non-assumed condition. Raising the certainty level of an assumption yields greater planning precision, better long term goals effectiveness and improved cost efficiency and program effectiveness. A planning assumption proposition can be internal to the institution or external to it. One criterion which is used in making a decision about inclusion or exclusion of a specific proposition at the institutional or cost center levels rests on whether or not the assumption has a direct bearing on setting goals and objectives at that level.

The list of categories for stating assumptions is as follows:

1. Assumptions about the societal context within which NCTC exists
2. Assumptions about external agencies

3. Assumptions about institutional leadership/management

4. Assumptions about NCTC programs (existing and potential)

5. Assumptions about potential students and enrollment

6. Assumptions about student services

7. Assumptions about staffing and professional development

8. Assumptions about physical plant

9. Assumptions about equipment

10. Assumptions about fiscal resources

Planning assumptions about the societal context in which an institution exists can focus on such issues of health, energy, transportation, lifelong training, quality of worklife, leisure, credentializing such as licensure and certification and program and institutional accreditation. Planning assumptions about external agencies can focus on the relationship between an institution and state and local governance, higher education as a system, articulation, and communication. Planning assumptions about existing and potential programs include new credit and non-credit programs growing out of needs assessment or market analysis segmentation studies.

Selected examples of assumptions are as follows:

It is assumed that equal educational opportunity as a right of all persons will be a dominant theme of federal and state legislation in the years ahead. This will mandate a focus on "packaging" higher education programs as we shift from the 20th century goal of "education for all" to the 21st century goals of "education for each." It will necessitate careful attention to remedial education, programs to overcome academic deficiencies as well as developmental education, programs to develop the diverse talents of students.

We have moved from an era of thinking about education as something given in the early years of youth and lasting throughout life to thinking about education as occurring throughout a life span. It is assumed this trend will continue
as an increasing number of Americans anticipate job or career changes, states mandate continuing professional education, and lifetime learning is viewed as a basic social right as well as an economic necessity.

It is assumed that the procedure for measuring educational accomplishments will change in dramatic ways. The system of amassing largely time-related academic units to reach the required total for a degree will yield to different output measures related to levels of competency in reference to designated bodies of knowledge and sets of skills.

The process of specifying assumptions is to diagnosis as the derivation of goals is to development. That is to say, the specification of assumptions is a way to focus the goals of the institution on the realities of the external and internal environment. The derivation of organizational and individual goals and objectives is the creative heart of the planning process.

The following definition of goals and objectives was adopted:

Goals and objectives are the foundation of the planning process; and it is vital for them to be clearly defined. Goals are defined as the desired end results over long periods of time (e.g., 3-10 years). Goals and objectives are often used interchangeably, but this is wrong. They differ in terms of their time frame, measurability and sequence. Goals are long run and the end result; objectives are short range and are steps in the direction of attaining a goal. Objectives are the measurable attainments or desired results over a short period of time (e.g., one year). Objectives are generally regarded as progressive steps toward a goal. Thus, a series of objectives should lead to one's goal. Goals must be established before objectives are specified.

North Central Technical College found it useful to develop a list of categories for setting goals and objectives (1) as a means for stimulating goals and objectives across a broad range of areas, (2) to provide a guide for similarity of goals and objectives for all departments within the college, and (3) as a framework for allocating dollars to goals and objectives across the college. The college ultimately settled on seven aggregate categories of goals. The categories of goals and objectives is displayed in FIGURE 1.
FIGURE 1 CATEGORIES FOR SPECIFYING GOALS AND OBJECTIVES

1. MISSION ATTAINMENT
   a. Promote understanding of mission statement within the college
   b. Promote understanding of mission statement outside the college
   c. Facilitate mission attainment (assumptions, goals and objectives, dollars to goals)
   d. Develop means to evaluate mission attainment

2. FUNCTIONAL RELATIONSHIPS
   a. Identify agencies and organizations
      (1) School systems
      (2) Business and industry
      (3) Service organizations
      (4) Professional organizations
      (5) Governmental agencies
      (6) Religious oriented organizations
      (7) Accreditation associations
      (8) Other
   b. Develop policy and procedures
   c. Specify strategy for pursuing positive functional relationships
      (1) School Systems
      (2) Business and industry
      (3) Service organizations
      (4) Professional organizations
      (5) Governmental agencies
      (6) Religious oriented organizations
      (7) Accreditation associations
      (8) Other

3. QUALITATIVE IMPROVEMENTS
   a. Academic Programs
      (1) Curriculum content and content formats
      (2) Alternative teaching strategies and techniques
      (3) Alternative ways for evaluating competencies
      (4) Minimum competency standards
      (5) Interdisciplinary considerations
   b. Student Services
      (1) Define comprehensive services in light of contemporary needs
      (2) Analyze what exists in light of contemporary needs
      (3) Diagnose needs of students
      (4) Link institutional resources to diagnosed student needs
   c. Institutional Management
      (1) Implement Planning, Management, and Evaluation (PME) System
      (2) Team leadership participatory mode of planning/management
      (3) Review policies, functions, organizational structure, and procedures
      (4) Program cost analysis

4. MARKET ANALYSIS
   a. Specify method of market analysis
   b. Develop programs in relationship to identified needs
   c. Specify policy and procedures for marketing (promoting) programs
   d. Analyze traditional college bound students by school district
   e. Identify non-traditional client markets
   f. Develop strategies to penetrate further traditional/non-traditional students
   g. Develop strategies to assist organizations diagnose training needs

5. PROFESSIONAL DEVELOPMENT
   a. Diagnose need
   b. Develop programs
   c. Allocate resources
   d. Affirmative action

6. PUBLIC RELATIONS
   a. List the college's major publics
   b. Examine alternative ways to communicate with publics
   c. Specify policy and procedure for systematic cultivation of various publics

7. FUNDING SOURCES
   a. Specify resource requirements over multi-year time-line
   b. Examine alternative funding sources
   c. Create policy and procedure for pursuing grantsmanship
   d. Incorporate grant management into college operations
Assumptions and goals and objectives were specified at the institutional and departmental levels using the above-described categories. There is a relationship among selected categories of assumptions such as "societal context", "external agencies", and "potential students". There is also a relationship among selected categories of goals such as "functional relationships", "market analysis", and "public relations". Assumptions about "equal educational opportunity" (a societal social expectation) applied to the "right to work" concept (an economic necessity for organizations in the technological society) has implications for a broad range of education, training, and retraining needs of potential students in the "world of work". This type of analysis yielded a number of specific ways to pursue functional relationships with business and industry (Goal 2-C-2):

(a) To host several early bird breakfasts for representatives from business and industry.

(b) To support activities of the Mohican Valley Chapter of the American Society for Training and Development (ASTD).

(c) To expand the number of calls on business and industry.

(d) To continue "on-site" classes in response to identified needs.

(e) To make better use of Program and Placement Advisory Committees.

(f) To develop and maintain "targeted" mailing lists.

To assist in the goal setting process at the departmental level the following categories were specified: (1) curriculum content, (2) teaching strategies and techniques, (3) evaluating student competencies, (4) setting minimum competency standards, (5) interdisciplinary considerations such as data processing and electronics, (6) advising and counseling students, (7) institutional committees, and (8) program advisory committees. There is an interrelationship between and among categories. Setting of minimum competency standards for obtaining academic credit for experiences acquired outside the NCTC context has implications for FUNCTIONAL RELATIONSHIPS (Goal Category 2) with secondary school systems, business and industry, and articulation agreements with postsecondary education.
METHOD OF EVALUATION

In the Planning, Management, and Evaluation (PME) system, that which is planned for during one fiscal year will be managed (implemented and coordinated) during the next fiscal year. Evaluation will occur both during the years the processes of planning and managing take place as well as during the following year. If an institution improves its planning-budgeting process in Year 1, a formative evaluation occurs during that same year followed by a summative evaluation sometime later. During Year 2, an institution can improve its managing-budgeting process. A formative evaluation of the managing-budgeting process will be made during that same year. A summative evaluation can be made sometime later and is the subject of this paper. The PME concept is displayed on FIGURE 2.

The issue central to either a formative or summative evaluation methodology lies in the question, "What evidence is acceptable as completion of goals and objectives?" As the PME methodology moves through various stages of sophistication, it is important to keep the process simple enough to understand. The model for evaluating the extent to which the College reaches stated goals and objectives is displayed in FIGURE 3. The model consists of the gist of the seven aggregate goal statements down the vertical axis and time arrayed along the horizontal axis with broader lines separating biennia. During 1977-78 and 1978-79, the College developed the first two components of the PME system and began to analyze data in a more systematic way. The first summative evaluation was completed at the end of the 1979-80 year.

The format was kept simple for evaluating institutional and departmental goals and objectives during the first year of a summative evaluation. The gist of each goal and objective statement was listed in a vertical column with space to rate the extent to which 1978-80 goals and objectives were achieved through a scale of 0 to 5 with 0 as unknown and 5 as outstanding. Persons having primary responsibility for institutional goals and objectives were asked to rate the extent to which goals and objectives were achieved. Appendix A contains an evaluation format for the institutional goals and objectives.
FIGURE 2: THE PLANNING, MANAGEMENT, EVALUATION CONCEPT

YEAR 1

YEAR 2

YEAR 3

YEAR 4

YEAR 5

PLANNING-BUDGETING  MANAGEMENT OF BUDGET  SUMMATIVE EVALUATION
## Goal Categories

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In spring of 1979, the College began a self-study as a part of the accreditation process for the North Central Association of Colleges and Schools. As a part of that process, the College reviewed and rewrote its mission statement; the Board of Trustees adopted the revised mission statement on May 23, 1979. The June 1980 edition of goals and objectives for 1980-81 contained the following statements under GOAL 1 - Mission Attainment:

GOAL 1

It is the goal of NCTC to assess continually the impact of its mission on the College's publics within the Technical College District.

OBJECTIVES

In concert with the Board of Trustees:

1.1 To promote understanding of the mission statement with the college and incorporate its implications in the planning, Management and Evaluation System.

1.2 To develop a mechanism to share with various publics the mission statement.

1.3 To specify a means to facilitate mission attainment. This would include annual review of mission statement when planning assumptions are reviewed and before dollars are assigned to goals and objectives.

1.4 To develop a means to evaluate mission attainment.

Persons having primary responsibility for particular goals and objectives are asked to evaluate the extent to which they are achieved.

This format is used to evaluate the extent to which goals and objectives are reached at all levels throughout the institution. Appendix B contains an evaluation format for the goals and objectives for the Vice President for Academic Affairs. Divisional Directors and other persons are asked to evaluate the extent to which these goals and objectives are achieved.

The method of evaluation described above is essentially "internal" to the College. This method could be expanded to include broader representation from the College's community or publics including Program Advisory Committees which helped to specify assumptions and state goals and objectives.
IMPORTANCE OF THE STUDY

During recent years Americans have become concerned about the "return" on their investment in the college experience. Demands for accountability from taxpayers, primarily through state legislatures, and the rising cost of tuition provide cause to ask, "Is support of postsecondary education worth the time and money in terms of the individual and value added to society?"

Postsecondary education at one time stood as the giant oak as the primary source of knowledge/information generation and transmission. Postsecondary education had exclusive right on a monopoly. Since an early study published in 1961 by the American Council on Education, business and industry has become involved in education and training in a big way. An article in the October 1978 issue of the American Association of Higher Education Bulletin begins as follows:

An extensive education and training system exists in private industry and government. The National Conference Board, for example, reports that in the single recession year of 1975, nation's 7,500 largest private employers spent over $2 billion on employee education--as much as the recent annual totals of all contributions from all sources to colleges and universities. And while college and university-based education is stabilizing and/or declining, the training and development sector in business, industry, and government is expanding rapidly.

Several years ago Kenneth Boulding gave us a warning by drawing an analogy between higher education and that other industry in decline--the railroads. The problem, he said, was that railroad managers did not view themselves as part of a larger transportation system, but simply as manager of an isolated segment, the railroads.

An article in The New York Times begins as follows:

Last year the American Telephone and Telegraph company spent $700 million on education programs for its employees, or more than three times the $213 million annual budget of the Massachusetts Institute of Technology.

Sixteen courses run by McGraw-Hill for its employees have been approved for college credit by the New York State Department of Education. At Honeywell, Inc., in Minneapolis more than 3,500 employees enrolled this year in 183 courses ranging from solar heating and cooling to women in business.
The introduction to an article in the May 1980 issue of the Training and Development Journal is as follows:

Industry spends on employee education more than six times the amount appropriated by all the states for all of higher education! If money is power, then industry occupies a power position in continuing education.

Industry is not only a major consumer of continuing education provided by others, it is also a major provider of continuing education, with large "in-house" training staffs and facilities. If competition is conflict, then industry is a source of conflict in continuing education, competing directly with other providers and pitting provider against provider as bidders for its continuing education dollars.

Robert Kost points out that industry's principal objective in continuing education is pragmatic: Continuing education should provide skills and knowledge that will improve employees' capabilities and be reflected in the quality of their performance and in their productivity. But industry is not so pragmatically profit-oriented that its concept of continuing education is totally restricted to task-related training; there is considerable support for Quality of Work Life programs, and the liberal arts as well as industrial arts.

Industry, Kost says, wants to cooperate with educational institutions, yet is not receiving the response it expects from academic sources, which is surprising in view of the widely-held assumption that such sources are securing college-credit equivalents, and some programs are even securing degree-granting accreditation.

Several researchers have presented data about the benefits of college for individuals and the returns to society in general. The research evidence indicates clearly that the college experience raises your level of knowledge and cognitive powers; increases personal self-discovery and psychological well-being; enhances traits such as adaptability; and positively affects your earning ability. The research evidence indicates the college experience makes you more careful in child raising, more efficient consumers, better users of leisure time, and healthier. The research also indicates that the college experience contributes to greater interest in politics and community affairs, that it helps to produce more responsible citizens and provides professional leaders who improve social conditions.

Research and evaluation must, however, go beyond the benefits of college for
individuals and include more in the way an institution or system impacts upon the quality of life in a region or state. This point is made in a recent labor-backed study that contends that an epidemic of plant shutdowns is sweeping the nation, with companies moving factories and leaving behind a trail of human and community devastation. The study reports that between 1969 and 1976, plant shutdowns and relocations eliminated 15 million jobs and created 16.4 million new ones, a slight net increase overall. The new jobs on an average, however, were lower-paying and in different regions of the country and did not go to the people who were left unemployed by shutdowns in the first place.

In summary, the future of any institution, particularly postsecondary education, rests on the degree to which it meets the needs of the society of which it is a part. As society changes, so must higher education change. If postsecondary education is to remain viable in the years ahead, it must develop models which demonstrate clearly the returns to society for its investment in the higher education corporate enterprise. The research designs and methodologies must go beyond the benefits to individuals and must include measurements of casual relationships of "significant differences" between resources (treatments) and changes in the quality of life. Furthermore, the models must include a clear demonstration of the benefits of collegiate and private and public sector interagency cooperation. The process of diagnosing societal needs, translating selected societal needs into institutional goals and objectives, and evaluating the extent to which an institution reaches stated goals and objectives is but one small step in that grand design.
FOOTNOTES


Please rate the extent to which the 1980-81 goals and objectives have been met using the following scale:

- **5** - Outstanding, far exceeds reasonable expectations
- **4** - Good, usually exceeds reasonable expectations but is not really outstanding
- **3** - Satisfactory, always meets reasonable expectations and occasionally exceeds them
- **2** - Doubtful, in general meets reasonable expectations but occasionally falls short
- **1** - Unsatisfactory, often falls short of reasonable expectations
- **0** - Unknown or non applicable

### Goals and Objectives

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<td>Share mission statement with various publics</td>
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<td>1.3</td>
<td>Specify means for mission attainment</td>
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Comments:

### FUNCTIONAL RELATIONSHIPS

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<td>Identify agencies and organizations</td>
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<td>Develop policy and procedures</td>
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<td>2.3</td>
<td>Specify strategy for pursuing positive relationships</td>
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Comments:
## QUALITATIVE IMPROVEMENTS

### Academic Programs

- **3.1 Curriculum content and format**
- **3.2 Teaching strategies and techniques**
- **3.3 Evaluating competencies gained within and outside the NCTC context**
- **3.4 Set minimum competency standards**
- **3.5 Interdisciplinary considerations**

### Student Services

- **3.1 Define each service area**
- **3.2 Assess institutional level of each service area**
- **3.3 Diagnose needs of students in relationship to each service area**
- **3.4 Link institutional resources to diagnosed student needs**

### Institutional Management

- **3.1 Design and Implementation of PME**
- **3.2 Promote team leadership**
- **3.3 Review institutional policies**
  - Functions
  - Organizational structure
  - Decision-making processes
  - Procedures

Comments:
4.0 MARKET ANALYSIS

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5.0 PROFESSIONAL GROWTH

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<td>c. Seminars and workshops</td>
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<td>d. Membership in professional organizations</td>
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<td>5.4</td>
<td>Set and monitor progress on affirmation action goals</td>
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Comments:
6.0 PUBLIC RELATIONS

6.1 List College's major publics
6.2 Ways to communicate with College's publics
6.3 Policy and procedures for systematic cultivation

Comments:

7.0 FUNDING SOURCES

7.1 Resource requirements to meet goals and objectives over multi-year time-line
7.2 Examine alternative funding sources
7.3 Pursuing grantsmanship
7.4 Grant management

Comments;
# APPENDIX B
## EVALUATION FORMAT
### Goals and Objectives of Academic Support (3010 and 3520)

Please rate the extent to which the 1980-81 goals and objectives have been met using the following scale:

- 5 - Outstanding, far exceeds reasonable expectations
- 4 - Good, usually exceeds reasonable expectations but is not really outstanding
- 3 - Satisfactory, always meets reasonable expectations and occasionally exceeds them
- 2 - Doubtful, in general meets reasonable expectations but occasionally falls short
- 1 - Unsatisfactory, often falls short of reasonable expectations
- 0 - Unknown or non applicable

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<td><strong>02.00 FUNCTIONAL RELATIONSHIPS</strong></td>
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<td>02.1 Presecondary education</td>
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<td>02.2 Joint programming with other educational institutions</td>
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<td>02.3 Articulation with postsecondary education</td>
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<td>02.4 Graduate courses on campus</td>
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<td>02.5 OOTC Council of Instructional Officers</td>
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<td>02.6 Business and industry</td>
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<td><strong>03.00 QUALITATIVE IMPROVEMENTS</strong></td>
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<td>03.1 Content (single course, sequence of courses, a complete program)</td>
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<td>03.2 Method of delivering content (teaching and learning styles)</td>
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<td>03.3 Evaluating student acquisition of knowledge and skills</td>
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<td>03.4 Setting minimum competency standards, including conversion to the metric system</td>
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<td>03.5 Academic service</td>
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<td>03.6 Program advisory committees</td>
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<td>03.7 Comprehensive institutional planning</td>
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<td>03.8 Team leadership participatory process of management</td>
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<td>03.9 Communication</td>
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04.00 MARKET ANALYSIS

04.1 Review needs analysis studies
04.2 Analyze methods for determining training needs
04.3 Systems approach to program development
04.4 Protocol for developing new programs
04.5 Market services

Comments:

05.00 PROFESSIONAL GROWTH

05.1 Content in a discipline(s) or technology
05.2 Teaching method
05.3 Testing student achievement
05.4 Stages of adult and career development
05.5 Advising and counseling students
05.6 Part-time faculty growth

Comments:

06.00 PUBLIC RELATIONS

06.1 List college's publics
06.2 Examine alternative ways to communicate with various publics
06.3 Specify policy and procedures for positive image building

Comments:

07.00 GRANTSMA rSHIP

07.1 Goals relating to grantsmanship
07.2 Clearinghouse for program information
07.3 Proposal preparation
07.4 Coordinate submission of proposals

Comments: