Continuing Education Unit Exploration
April – July 2004

Over a three month period, the Department of Continuing Education evaluated itself based on the following questions.

- What are we best at in Continuing Education?
- What is the passion in Continuing Education?
- Where do we need to improve?
- What do we need to do?
- What do we need to take away?
- Do we have the right people on the bus?
- Are the individuals in the right seat?
- How do we sustain a profit for Continuing Education courses and achieve sustainability with grant programs?
  - Economic denominator: how can we increase profit through our one-time contact with customers?

These questions were answered by the development of several products:

1. **Mission Statement**: A multi-service unit of Hillsborough Community College that provides comprehensive educational experiences, which advance the Tampa Bay Area’s economic growth and global competitiveness through education, training, and services, that contributes to continuous workforce improvement.

   Our programs are relevant, technologically current, and designed to promote student success in the areas of:

   - Adult General Education
   - Allied Health Continuing Education
   - Career and Workforce Advancement
   - Child Care Management
   - CPR
   - Insurance
   - Life Long Learning and Full Participation in our Society
   - Real Estate
   - Self-Paced and Enrichment Computer Courses
   - Vocational/Technical Education

   **Rationale**: The development of the mission statement defines what Continuing Education is best at and exactly what it is that the unit does.—Questions 1-2

2. **Improvement Paradigm**: Three primary things contribute to the negative perception of Continuing Education as a valuable contributor to Hillsborough Community College:
A. Continuing Education is often viewed as a valuable contributor to the community, but not always as an economically profitable operating unit of the college.

B. The college and other departments therein sometimes misunderstand: 1) the profile of the continuing education student as it is different from the conventional student; 2) the necessity of individuals in certain disciplines to attain continuing education units; and 3) the urgency and expediency required to serve these students.

C. Some staff of Continuing Education allows the negative perception of Continuing Education to permeate their attitudes and work ethic.

Resolution Strategies

- Items A and B, above, both relate to communication disconnects. Therefore, the team suggests that we develop and sustain marketing communication tools that 1) clearly and effectively communicates the outcomes of grant awards, programs, etc. of Continuing Education; and 2) highlights a program of Continuing Education, explaining the target audience, the need, the course curriculum, and the result/value of the program to its participants, the college and the community.

- To increase the visibility of Continuing Education, it is suggested that we include “Continuing Education” in verbal and written correspondence, and especially, flyers, new articles, and other public communication venues.

- Continuing Education had been given the charge of adopting and exercising a departmental slogan to remind us of our present selves and work in the manner that we want the college, other departments, and the community to perceive us. Remember that “perception is reality” and “people treat you how they perceive you”.

  **Slogan:** “Well….how do we look?”

- A logo for Continuing Education was also developed.

  *(Insert Logo)*

**Rationale:** The unit was actively encouraged to think about question three (Where do we need to improve?). The Improvement Paradigm was developed and presented.—

**Question 3**

3. Advisory: A framework to select advisory boards was developed for each unit within Continuing Education to use.

**Philosophy:** An advisory body, whether it be formal “council” or informal “group” can be organized to provide a variety of functions. Most entities that utilize such a body begin by identifying its perceived functions and purpose. Please list the ways you feel that an advisory body might be helpful to your area of CE programming:
Formation of a Continuation Education Advisory Body

The first step toward achieving growth and enhancing credibility for the department is the formation of a Continuing Education Advisory Body. The following steps are presented for consideration in the development of an Advisory Body.

- Determine what is required of the Advisory Body (see above activity).
- Extrapolate from the activity to articulate the desired mission, roles and responsibilities of the Advisory Body.
- Obtain administrative input to determine legalities, protocols, and options concerning departmental advisory bodies.
- Decide whether the body is to be a formal ‘council’ or informal ‘group’, based upon the mission articulated above. Formal and informal bodies each have distinct characteristics relative to their ability to make binding policy.
- Determine what each member is expected to contribute to the body.
- Determine optimal board number and composition, including amount of academic, business, and community representation.
- Devise a plan for recruitment of advisory body members.
  - Identify candidates
  - Inform each candidate about the focus of the group
  - Generate candidate’s interest
  - Present opportunity to become involved
  - Cultivate the desire to invest emotionally
- Once organized, devise a plan to keep the group cohesive, on-task, and efficient.

A detailed description of the entire Advisory Body development process is listed in Appendix A.

Rationale: The development of the Advisory Committee framework created a methodology for Continuing Education to better assess the unit’s creditability and to achieve long-term growth.—Questions 4 & 5

4. The Right People on the Bus: The question was posed regarding the type of talent and skill Continuing Education needed to draw in the form of staff to sustain profitability, creditability, and growth. The following skill/characteristic list was developed:
<table>
<thead>
<tr>
<th>Skills</th>
<th>Knowledge</th>
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<tr>
<td>1) Team Player</td>
<td>Planning</td>
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<td>2) Diversity</td>
<td>Expertise in Area</td>
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<td>3) Salesmanship</td>
<td>Perform/Competence</td>
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<td>4) Negotiator</td>
<td>Computer</td>
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<td>5) Openness</td>
<td>Marketing</td>
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<td>6) Trustworthy</td>
<td>Experience Wide-base</td>
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<td>7) Reliable</td>
<td>Finance Budget</td>
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<td>8) Communicator</td>
<td>Development</td>
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<td>9) Maturity</td>
<td>Well Networked in and about</td>
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<td>10) Creativity</td>
<td>the community</td>
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<td>11) Marketing Communications</td>
<td>Grant Writing</td>
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<td>12) HR Personnel Development</td>
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<td>13) Grant Writing</td>
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<td>14) Organizer</td>
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<td>15) People Oriented</td>
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<td>16) Ability to Delegate</td>
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<td>17) Multi-tasker</td>
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<td>18) Manager</td>
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<td>19) Follow-up</td>
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<td>20) Proactive</td>
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<td>21) Networker</td>
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<td>22) Compassionate</td>
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<td>23) Listener</td>
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<td>24) Decision maker</td>
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<td>25) Administrator</td>
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**Rationale:** This list addressed the existing and needed skill levels and knowledge base for existing and future Continuing Education staff.—Questions 6 & 7

5. **Economic Denominator:** This area still requires further work. Courses are run from a profit margin perspective in Continuing Education. Equating the profit margin to cover all costs (tangible and intangible) has to be derived.

**Rationale:** Question 8 is addressed but incomplete in the response.
APPENDIX – A
Developing An Advisory Body

Situation: you want to secure funding to create a new program, expand one or establish an endowment. You would like to utilize the expertise of higher-caliber.

The decision to form an advisory council begins with an organizational commitment to a strategic, thoughtful and cumulative process that will extend over a long period of time. This is not a quick solution to solve an immediate or impending crisis.

The process begins with a written description of the program you want to address, the parameters within which the council will be focused, the results you are seeking and a plan to guide the development. This clearly defines the strategies, people and resources which will assure success of the effort.

The Big Picture: Your Overall Organization and the Advisory Council

Incorporating the Council Into the Overall Organization

Incorporating an advisory council into the organizational structure depends upon whether the organization has a governing board of directors. An advisory council can be especially effective for organizations that do not have a local governing board.

Most non-profit organizations, however, typically do have a board of directors. From the onset, seek the board’s involvement and formal approval. While the board focuses on the mission as a whole; the advisory council focuses on one, single aspect of the mission. To achieve optimal results from the council, the board of directors clearly defines the advisory council’s role and then empowers the council to move forward according to an established time line. The board needs to be committed to accepting and implementing well-considered recommendations of the advisory council. A board member should be appointed to chair the council and serve as the communication link between the two.

Staff or management support is critical. Council members should not be burdened with details, such as creating agendas or taking minutes. You want them to generate ideas and give advice. This is an application of the adage: ask people for money, they will give you advice, ask people for advice, they will give you money.

Positioning the Advisory Council - Advice vs Advisory
Clearly, the advisory council is not a committee of the board; council members are not involved in management, finances or supervisory activities. Usually, council members do not want to be involved directly in these activities. Members of the advisory council are sought to offer their opinions, their experience, and their counsel. This group is not a task force. They are not charged with responsibilities requiring significant portions of their time. Implementing recommendations is obviously important, but council members will not be involved extensively in that process.

Their role is outline the “what and how.” Tasks that are assigned to council members must be simple and easily executed. For a small time commitment form each member, a council produces immense brainstorming and idea-generating power. Members should be able to easily gather information and research that may be needed or direct staff to sources.

**Identifying Candidates for the Council - Where do you start?**

**Forming a dynamic team**

As you assemble a list of the individuals you want to involve, begin to develop a written profile of each one. Questions to ask: With what other organizations is this candidate currently involved? Is the focus of this advisory council and opportunity to advance his/her interests? Why would this candidate be willing to serve? What financial resources could he/she bring to the project? What is the best approach to recruit this individual? Who should be involved? Use the members of your board and other donors to help you find the answers.

In recruiting a dynamic advisory council, certain elements need to be considered: a link to the board, a champion to provide vision and one or more primary gift prospects. A member from the board of directors should chair the council and help recruit others. The first member to recruit is the champion, followed by the primary gift prospects. Commitments from these individuals will be powerful factors in recruiting other individuals.

Think of the recruitment process as the initial steps in your major gift program:

1. **Identify** candidates and complete individualized profiles

2. **Inform** each candidate about the focus area for the advisory council

3. Think about what will appeal to each individual’s **Interest**

4. Present the opportunity to **Involve** them with your organization

5. Then, through their participation, they will begin to **Internalize** your mission and develop ownership of your common goals
6. As the relationship develops, you will be able to plan the cultivation process that will lead them to **Invest** in your program

7. Seeing the results produced by the advisory council will motivate them to **Immortalize** themselves and perpetuate their values through endowment gifts that will impact the lives of generations to come

This process serves as a blueprint for the cultivation of each candidate. Determine at that stage they may be currently involved with your organization, establish your preliminary objective for each one and begin to develop a plan to move them toward realizing it.

**The Champion**

The champion can be the most important element of a successful advisory council. This person provides vision for other council members by helping them peer into uncharted territory. The champion is the idea person; the one with a dream. The champion leads the council by stimulating but not dominating discussion. The champion sparks the fire which the council then fuels by expounding on the ideas. Artfully, the champion leads the council through this brainstorming process and allows council members to adopt these ideas as their own.

**The Primary Gift Prospects**

Acquiring the resources necessary to make an idea a reality requires more than well-intentioned people. Significant programs require significant financial resources. The primary gift prospects ideally should be already interested in the focus area. Identifying these individuals requires extensive research utilizing the knowledge of your board members, past experience with your organization, and your personal contact with them. These individuals should have the ability to work well with others and have positive, can-do attitudes. The primary gift prospect profiles should be updated frequently, as the information in their profiles will prove invaluable when drafting a persuasive gift proposal for their investment when the program is ready for implementation.

**Other Council Members**

When commitments from these first individuals are secured, you can begin to recruit other members. With these first members on board, your cause will be powerfully reinforced and highly appealing to other candidates. Additional members should also have financial means which they will be likely to invest after they have contributed significant time and created a new vision for the organization. You will want to recruit a total of eight to twelve members which is optimal for group dynamics.

Individuals with education and experience or significant interest in the program area are best qualified. It is an appropriate vehicle for involving candidates who may not wish to serve on the board or desire a limited time commitment. This is also a meaningful way to involve individuals who cannot serve on the board because they have fulfilled their term
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or the board does not have any positions open. Too, it is a sensitive means to keep others involved who may have a long-standing relationship with your organization, but now are not physically able to continue active participation.

**Getting the Advisory Council Started**

**Define the council’s focus**

Identifying, thoroughly defining and articulating the council’s focus area are the initial steps. The advisory council needs to work within a well-focused area as defined by the board. The focus area should be non-controversial, relate directly to the mission and capture the council’s curiosity and sustain its interest. The focus area should be open to a range of solutions and opportunities as exploring those options will yield ownership among council members. Defining the program area, the work process, and potential benefits are necessary in preparing for the first meeting.

The focus area may be the development of a new program, expansion or evaluation of a current program, funding of a program that is not self-supporting or establishment of the endowment. The focus area may overlap several of the possibilities mentioned.

**Development of a new program**

Focus on defining the objectives and elements of the program and the strategies to develop the program.

**Expansion of a current program**

Focus on how to make the program more efficient, how to maximize marketing efforts and enhance fund raising efforts.

**Support of a program that is not self-supporting**

Focus on the relevance and importance of the program to the community, how the program can operate with optimal efficiency, and how to attract additional funding.

**Establishment of an endowment**

Focus on the long term goals of the organization and how to provide financial stability.

*Note: As defined in this context, advisory councils do not lend themselves to a building project or as a task force as those tend to be short-term, intensive efforts.*

After the focus area is defined, specify the advisory council’s role. Establish the council’s mission, but do not constrain it with a pre-determined step-by-step process. Allow the council to determine the process.
As the advisory council evolves, other people in the community may be recommended for membership. Involving people with specific, but limited financial capability may benefit the council on an ad hoc basis.

Recruiting Process

The process of recruiting members is conducted similar to gift solicitation. Meetings with candidates begin with background information on the organization’s mission and programs.

This information should be linked persuasively to the focus area. Plan questions that will engage people in conversation. Discuss the candidate’s interests, how those can be applied to your project and why his/her involvement is particularly important. Written materials should include: organization’s mission, the council’s purpose, advisory council member qualifications and program information.

The First Council Meeting

The meeting begins with an expression of gratitude from the board chair of CEO for the council’s commitment of time and expertise and review of their purpose. Use visual aids and stories to create a strong impression and underscore the need for the advisory council.

Each member should receive a three-ring notebook containing the mission statement of the organization, a roster of advisory council members, members’ job descriptions, specific program information, pertinent policies, tentative future meeting schedules, etc.

The point of this meeting is to provide an excellent grounding in the program area. The staff person responsible for the program needs to attend this meeting to provide an overview and field program-specific questions. The program director (and the champion) will provide the raw material for the council to begin working. The competence of the program director will give the council members confidence in the program and its potential.

The first meeting will set the stage. The meeting should be followed up with minutes. They will serve as a springboard for the following meeting’s discussion. Draft them strategically! Remember that minutes are a staff function, not a council member function.

Orchestrating the Council: A Thoughtful, Authentic Process

Planning meetings with the chair and champion, strategically drafting minutes, thoughtfully planning tasks for council members to execute: this entire process must be conducted in professional, inclusive, sincere manner. Council members expect and will respect the effort it this process is authentic. They may be leaders within their individual
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spheres of expertise and experience, but they will appreciate leadership in this effort. The council members will want to become engaged in the process and fulfill their commitment.

Building the Council’s Momentum

Guiding From This Point Forward
Thus far, we have discussed the use of an advisory council, clarified its role, and discussed the recruitment of council members and getting it started. This process began by looking at the needs of the organization, then identifying opportunities to involve people in a way that is meaningful and possible for them.

Guiding the council is a cyclical process: observing people and their discussion, formulating the next steps, etc. This cycle will continue through the life of the council and the process will become more complex as the council moves forward.

Diligent documentation, which began at the genesis of the council, should continue. The plan (the strategies and the desired results) requires regular updating. Discussion, observations, new knowledge, comments: each offers valuable pieces of information that guide decision making in this strategic, thoughtful, cumulative effort. Careful analysis of this information after each meeting will shape the next steps of your plan. Documentation, from beginning to end, yields strategic management and control. It’s useful for defining direction, critical to maintaining momentum, essential to achieving success, and vital to building trust.

Next Steps: Envisioning the Future through Brainstorming

The champion is most valuable in this process. He/She provides understanding, poses questions to be answered and opens the universe of possibilities. The champion stimulates discussion, but does not dominate it.

Time spent in advance of the council meeting for planning by the chair, development director and the champion is critical to planning this stimulation. The purpose is to frame the focus of the champion’s vision. Planning predetermines may hesitate to voice their personal opinions. The selection grid makes it easier for them to evaluate solutions and opportunities to arrive at a consensus on priorities for action. The sample selection grid lists five priorities (the number of priorities may vary). Each member numerically rates each of the solutions according to impact on the organization’s mission, implementation costs, time required for implementation, or other criteria specific to your program. Then, it is a simple matter of totaling points which reveal the order of priorities. Priorities are finalized by discussing them in context with the desired results established at the beginning of the process and with the mission. The advisory council is now ready to submit a formal recommendation to the board for approval and action.