EDINBORO UNIVERSITY OF PENNSYLVANIA

CONDUCTING NON-CREDIT CONTINUING EDUCATION-Policy No. C028

Supersedes Policy No. C028, Dated 11/28/89

Recommended for Approval By John F. Fleischauer, Provost and Vice President For Academic Affairs

Approved By Foster F. Diebold, President on December 1, 1994

Review Date: As Required

INTENT

To establish the procedures and guidelines for conducting Continuing Education activities through Edinboro University of Pennsylvania.

POLICY

1. Opportunities for continuing education through non-credit learning activities are part of the mission of Edinboro University of Pennsylvania. Authority to determine which activities are appropriate for University endorsement resides in the Office of the President.
2. All continuing education activities conducted in the name of Edinboro University of Pennsylvania must be conducted through the Office of the Institute for Research and Community Services.
3. The Continuing Education Office of the Institute for Research and Community Services shall have responsibility for establishing and maintaining effective fiscal control of Continuing Education operations within general University policies.
4. The Continuing Education Office of the Institute for Research and Community Services shall have responsibility for developing, delivery, and marketing strategies and coordinating all aspects of University Continuing Education activities. Continuing Education activities shall be conducted within the guidelines found in Article XXVII of the APSCUF-SSHE Collective Bargaining Agreement.

PROCEDURES

All continuing education activities shall comply with the specific procedures contained in the Procedural Guidelines for Conducting Continuing Education Activities document published by the Institute for Research and Community Services. These procedural guidelines are designed to clarify and facilitate the development, preparation, and delivery of University Continuing Education activities for the University's private and public sector clientele, and assist with the professional and fiscal management of the projects.

Attachment

PROCEDURAL GUIDELINES

FOR

CONDUCTING CONTINUING EDUCATION ACTIVITIES

Published by:

The Institute for Research and Community Services

Edinboro University of Pennsylvania

Edinboro, PA 16444

Date: 08/01/88

The attached Procedural Guidelines for Conducting Continuing Education Activities are the official University guidelines for use with University Policy # Conducting Continuing Education Activities.

Approved By Foster F. Diebold, President

Effective Date: December 1, 1994

PROCEDURAL GUIDELINES FOR CONDUCTING CONTINUING EDUCATION ACTIVITIES

BACKGROUND -

Among the principal objectives of Edinboro University of Pennsylvania is that of public service. In order to maximize the opportunities for public service, Edinboro University encourages and supports continuing education projects, and actively seeks developmental and teaching expertise for such projects. It is the general policy of Edinboro University to endorse continuing education activities which serve the best teaching, research and public service interests of the University and its service area.

The President is authorized on behalf of the Council of Trustees to accept continuing education proposals from internal and external sources. The Institute for Research and Community Services shall have oversight responsibility and authority in initiating, coordinating, reviewing and critiquing continuing education proposals prior to their offering by the University, and in working with the Academic Divisions to assure consistent policy and procedural compliances in the delivery of acceptable programs. These guidelines are designed to assist all University personnel with the development, preparation, and delivery of University Continuing Education Projects for the University's private and public sector clientele, and with the professional and fiscal management of the projects.

INTRODUCTION -

The Institute for Research and Community Services (IRCS) acts as a focal point and a coordinating agent for University contact with, and service delivery to, all constituencies external to the University.

Continuing Education, a service of the IRCS, is charged with,

1. On-going assessment and analysis of external organization, professional and personal needs and interests which can be served by Edinboro University through the IRCS.
2. Developing program delivery and marketing strategies which enhance public awareness of the University and its many strengths.
3. Providing technical assistance in the marketing and delivery of University non-credit programs and services;
4. The responsibility of negotiating fees and contracts which recover direct and indirect costs of such programs; and
5. Conveying a University presence to all the above-mentioned constituencies which is congruous, cost-effective, and competitive.

It is important, therefore, that the Institute maximize the use of University talent when providing outreach services. This procedural guide has been developed to assist University personnel who participate in the delivery of continuing education activities and, subsequently, contribute to Edinboro University's public service. Continuing Education has been defined in many ways and there is no generally agreed upon definition. Therefore, the following definition has been developed by the Institute and is stated here to serve as a guide.

At Edinboro University, continuing education is the delivery of University instructional services designed to meet the educational needs and interests of organizations and individuals not served by traditional programs of the University.

The Institute plans to provide University instructional services through continuing education within the following general categories:

1. Organization Development - Instruction designed to improve the structure, procedures, relationships, environmental quality, and productivity of a targeted social system through development of increased competencies in its personnel.

2. Professional Development - Teaching-learning experiences designed to help individuals already engaged in professions, vocations, or occupations to advance their proficiency, peer recognition and public acceptance in terms of occupational aims.
3. Personal Development - Continuing education activities designed to develop knowledge, insights, skills, attitudes, values and interests related to self-enrichment goals.

Continuing Education activity within the first two categories will originate from requests by associations, organizations, and groups of people with common educational interests or needs. Programs will also originate from within the University, particularly among faculty members. Faculty members are encouraged to investigate and pursue ideas and suggestions for continuing education programs within their respective disciplines, thereby contributing to the public service interests of the University and its service area.

Category three will be less structured than categories one or two and programs in this category will be developed randomly and scheduled based on special needs or circumstances.

The Institute's goal is to provide quality learning activities which meet client needs and sustain subsequent continuing education efforts. To accomplish such a goal each continuing education activity must be organized in a deliberate manner. This guideline is designed to assist in that effort through the following five phases:

l. Pre-planning Review

2. Planning, Budgeting and Fee Development

3. Promotion

4. Program Delivery

5. Evaluation and Follow-up

PRE-PLANNING REVIEW -

Continuing Education projects are manifold activities which require the University to invest resources in public service projects which are speculative and provide no assurance of fair return on investment.

Following this scenario, any continuing education idea should be scrutinized and brought into focus prior to its implementation. It is recommended ideas be shared with colleagues and potential program participants to verify assumptions and provide alternative perspectives. The Institute has developed a Pre-planning Review Form (appendix one) to assist with the pre-planning process. The Pre-planning Review Form can be completed individually or in a group setting and is designed to encourage consideration of all aspects of the program. Items covered include:

1. Proposed title, date & location.
2. Intended audience, size, motivation to attend and how to reach the audience.
3. Program description and goals.
4. Recommended instructional staff along with format and topical outline plus instructor remuneration and travel agenda with estimated cost.
5. Instructional parameters and requirements.
6. Other considerations and comments.

When completed, the Pre-planning Review Form is forwarded to the Continuing Education office. The Continuing Education office will use the information from the Pre-planning Review Form when communicating with the appropriate Academic Chair and to organize the initial planning meeting.

PLANNING, BUDGETING AND FEE DEVELOPMENT -

The planning phase of the procedure, initiated at least six months (24 weeks) prior to the proposed activity, is done through a group process. The group should include a subject matter expert (the actual instructor if possible), a representative from the Institute's Continuing Education office, and one or more persons familiar with the educational needs of the target audience. This group meeting is designed to focus on activities required to assure a successful program and to determine how and when each activity will be accomplished.

The completed Pre-planning Review Form can be used as the agenda guide for the planning meeting. Use of the form will keep the meeting on target and expedite the entire procedure. The planning meeting should accomplish the following:

l. Theme and objective of the Continuing Education activity is established.

2. Program content is determined, including number and length of sessions and "free-time activities," to be included.

3. Instructional personnel are selected and remuneration rates established and agreed upon.

4. Dates and program location are resolved.

5. Program audience is defined.

6. Initial budget estimates are developed and program fees determined.

7. Committee members are given program assignments, which include but are not limited to:

a. Brochure preparation and mailing arrangements

b. Advertising strategies carried out

c. Arrangements with and for program staff

d. Food service and facilities arrangements

e. Instructional material preparation

f. Registration procedures

g. Preparation/processing of University forms

h. Program evaluation

i. Etc.

Well defined time frames which are essential to each activity assignment and are critical to quality Continuing Education programming, should be established for each activity.

The IRCS has developed several additional forms and checklists to assist with the planning process. Three which are also used in the planning meeting are:

l. The Planning Calendar (appendix two)

2. The Assignment and Program Activity Target Dates form (appendix three)

3. The Non-credit Program Budget and Fee Development form (appendix four)

The Planning Calendar is a two academic year worksheet designed to provide ease in determining program timelines and selecting key deadline dates for activities. The calendar also helps to avoid conflict with other University activities.

The Assignment and Target Date Checklist is a chronological listing of each key activity which needs to be accomplished at a specific date in order to successfully deliver a quality program. The Checklist is used during the planning process to record the date each item listed will be accomplished. The Checklist can also be used to monitor program activities as they are carried out. There is space on the Checklist for notes and comments.

Budget and fee development is an important part of the planning process. Continuing Education projects often depend entirely on participant fees to cover direct and indirect costs. While some activities can be conducted on a "break even" basis, the University cannot conduct programs at a loss. It is important, therefore, fees be competitive and also recover costs.

Multiple factors influence budget and fee development. Minimum fee levels are established to recover direct expenses through projected enrollments. The program's value to the intended participant is what determines the maximum fee limit. The relative availability of similar programs and activities determine where, within the minimum and maximum range, the actual program fee should be set.

The Non-credit Program Budget and Fee Development Form provides a format for the planning group to itemize expenses under specific categories for analysis when developing minimum fees.

A project can be supported by both individual registration fees and a fixed lump sum fee subsidy from an organization. In these instances the subsidy from the organization is listed on the Form as "Other Income" (Item E). The individual fee is then based on the total budget including this subsidy.

A project may be supported by income from both individual fees and organization fees when no fixed lump sum subsidy has been budgeted. In such instances, a Letter of Agreement between the organization and the University indicates that a program will be held for a minimum number of registrants at a stated cost per registrant. Whenever a minimum enrollment clause exits, the agreement indicates the organization, on the basis of the individual fee, will pay the University a sum equal to the difference the actual income and the predetermined minimum enrollment fee income.

When involvement in a project by another organization warrants, the University will make a fee arrangement whereby the net income from a project is split with the group being served. In such incidences, an organized group agrees to bear certain stipulated costs of a project with the understanding that it will be reimbursed as direct expenses are recovered. Details are set forth on the Program Budget and Fee Development Form and arrangements are made for subsequent billing to the University. Net income is shared after all program expenses have been recovered.

An item-by-item interpretation of the Non-Credit Program Budget and Fee Development Form is provided here as a permanent reference for program planning participants.

Preparing the Non-Credit Program Budget and Fee Development Form

Name of the Program: Use the same name or program title that will appear in a brochure and on all forms relative to the given program.

Date and Program Location: If the program is to be offered on different dates at several locations during a fiscal year, one form will cover all dates and locations. List the date and location of each program.

Short Course and Focused Format: For workshops, conferences and seminars (focused format) list the number of days and hours per day. If the program does not meet on consecutive days, list the number of sessions, total hours and frequency (i.e., once a week, three times a week, etc.). Give a number of CEUs assigned to programs, if applicable.

DIRECT AND ADMINISTRATIVE EXPENSES

1. Promotion

<u>Brochures</u> - Include all printing costs regardless of University budget to which such costs may be charged.

<u>Mailing</u> - Include postage, charges for addressing and mailing service, envelopes, stationery for promotional letters. Do not include wages for secretaries or part-time help.

<u>Other</u> - Advertising and any additional costs directly related to promotion. List the items.

2. Salaries & Wages

<u>Instructional Staff</u> - list totals only: On the back of the form use one line for each person on the program staff--check whether they are University or non-University, estimate hours, days, wages, and expenses.

<u>Technical Assistance</u> - give one total which should include wages for audio-visual operators, drivers, technicians, etc. Details on the back of the page will be helpful.

<u>Clerical Assistance</u> - list one total for part-time clerical people engaged in preparing promotional materials, instructional materials, registrations, etc. A full-time secretary's time should not be included unless involvement is judged to be excessive.

3. Travel

<u>Instructional staff</u> - totals should include travel and all expenses reimbursable under the University's travel policy.

<u>Other</u> - list a total for travel and related expenses for all technical, custodial, clerical, and

other personnel. Do not include travel expense for Institute for Research and Community Services personnel unless it is excessive. For example, meals and lodging for several days would be excessive.

4. Special Features

Rental of Space - space rental other than lodging.

Transportation - hauling of equipment and materials, busses for group tours. Do not include items that can be covered by travel expense reimbursement.

Audio-Visual Aids - rental costs for instructional equipment, films, preparation of charts, slides, graphs, etc.

Other - certificates, name tags, name tents, tickets, photographs, flowers, and other miscellaneous items not covered elsewhere.

5. Fringe Benefits

Percent of salaries and wages contributed toward retirement (full-time personnel only), social security and workmen's compensation by the University.

6. Direct Costs

The totals of Items #1 through 5.

7. Administrative Expenses

Show details on back of sheet. If costs are itemized, attach supporting information. If a percentage is used, list the percentage and the base to which it is applied. Fees for most programs include administrative costs based on a percentage of direct costs.

The percentage figure is a mathematical device weighted by numerous considerations including the approximate expenditures for administrative time, travel, and operations.

In most instances involving average risks of enrollment and normal operation costs, fees should include an indirect cost equal to approximately 20% of the total direct cost. Some variables affecting the indirect cost percentage are:

Lower Percentage for Indirect Costs:

Large enrollment

Little or no promotion

Little or no risk on income

Project of public service nature

Little work required

Instructional wage very high

Higher Percentage for Indirect Costs:

Small enrollment

Great amount of promotion

Large degree of risk

Project for profit making group

Much work required

Direct cost low, effort high

8. Program Expenses

The total of Items #6 and #7.

OTHER ADD-ON EXPENSES

9. Participant Handouts (per person)

Notebooks, Texts - Includes clipboards, folders, lettering of covers, books, pamphlets, special reference materials.

Materials and Supplies - The cost of pass-out materials, administrative supplies such as paper which is used for instructional purposes, pencils, notebook inserts, etc.

Other - All instructional items not covered elsewhere.Example: tele-lecture costs, TV production and transmission.

Total - The per person total for notebooks, texts, materials, supplies and other instruction items (should not be included in base when calculating administrative expenses).

10. Food and Lodging (per person)

Food - if included in the fee, list the per person cost of each meal and break and then determine per person cost for all food.

Housing - Should also be listed as a per person cost.

Total - The per person total for food and housing -- this item should not be included in the base for determining administrative expenses.

11. Add-on Total (per person)

The total of Items #9 and #10.

INCOME:

A. Anticipated Enrollment: Estimate number of fee registrations anticipated.
B. Recommended Fee Per Individual: List the fee you recommend per individual by dividing Item #8 (Program Expenses) by Item A (Anticipated Enrollment) and add Item #11 (Per Person Add-on Total).
C. Recommended Fee Per Group: List the recommended fee per group if each enrolled is not to pay an individual fee.
D. Income From Registrations: Enrollment multiplied by the individual fee, or the total income from the group fee.
E. Other Income: State amount and indicate if it is to be collected by Letter of Agreement, contract, or other financial instrument.
F. Income: Total of all income.
G. Net Income or Loss: Line F less total expenses. This sum should be as close to a zero balance as practical. A loss should appear only in unusual circumstances. For example -- some public service programs, some programs offered in the interest of the University.

The Non-Credit Program Budget and Fee Development Form is designed to accomplish a realistic projection of income and expenses for a Continuing Education project.

The Director of Continuing Education, being responsible for establishing and maintaining effective fiscal control of Continuing Education operations consistent with general University policies, reviews and approves the fee for each project.

The Continuing Education Director is responsible for administering the budget for the project in accordance with the policies and procedures of the University.

All student accounts for the Continuing Education project are maintained and serviced by the Office of Continuing Education.

As the project evolves, the Continuing Education Office adjusts the income and expense projections. Where income figures are available, projections are changed to actual dollars collected. Where expense figures are available, projections are changed to actual dollars spent. Where exact collections and expenses are not available, the Continuing Education Director up-dates the original projections based on the most current information available.

Continuing Education operations are dependent on both an income and expense budget. Therefore, it is necessary for the planning group to make periodic budget reviews to determine whether or not a proper balance is being maintained between income and expenditures. Reviews provide the Continuing Education Director and the program staff with an inventory of accomplishments, planned activities, and reliable data for future projects.

PROMOTION

Methods and schedules for promoting the Continuing Education activity should be outlined during the planning meeting and begin as early as possible in the process. Most of the media mentioned on the following pages of this guide can be used to publicize a project. However, when a program is planned for an organized group, the primary promotional effort should be the responsibility of that organization.

The key to successful promotion is the ability to tell the story to the right audience. The planning committee should specifically identify the audience and provide the content for promotional materials. The committee should recommend mailing lists and suggest sources for registrants. In most instances, the planning committee members will assist in a variety of promotional activities.

The Director of Continuing Education coordinates and directs the promotional activities and the overall marketing plan.

The Public Relations Department provides publications assistance for all continuing education programs by assisting the Continuing Education Office in developing public information materials, brochures, printed announcements or information pieces distributed and processed through the University.

Promotion is a continuous process. Every public contact is a promotional activity. Every class, conference, workshop, and phone call has promotional significance. However casual and subtle, promotion must be supplemented with deliberate publicity.

Usually a single promotional action is insufficient. Therefore, publicity must be a well planned effort utilizing a combination of promotional media. The most commonly used approaches are listed and briefly defined on the following pages.

Promotional Media:

Direct Mail

Posters or Placards

Newspaper Advertising

Newspaper Stories

Radio

Trade Magazines

Personal Contacts

House Organs

Direct Mail

Consistently, direct mail ranks with the top promotional media. Success depends on a good promotional piece and a good mailing list. The most commonly used promotional pieces are brochures, flyers, and letters.

Mailing lists are of four types--those maintained by the academic unit, mailing lists collected, developed and maintained by the Continuing Education Office, purchased lists and lists provided by participating organizations. The Continuing Education Office continually develops and updates mailing lists, keeping in mind that most lists are less than 100 per cent correct when published, and the percentage decreases greatly if the list is not consistently updated.

Continuing Education maintains mailing lists by type of organization, location, and occupational titles. The mailing list data base for business and industry includes the capability of determining occupational titles to which mailings should be directed.

Names and addresses may be added to the lists by forwarding them to the Continuing Education Office with the following information:

a. Organization name.

b. Street address.

c. town or city, zip code.

d. County (if in PA; not needed for out-of-state).

e. Total number of employees (if known).

f. Product made or service rendered.

Posters

Posters or placards are used to promote projects of interest to local clientele, since distribution is usually accomplished through personal delivery.

Posters have the following advantages:

a. selective distribution
b. low cost
c. easy to handle
d. extended visibility

Newspaper Advertisements

Experience indicates that newspaper advertising is not cost effective and doesn't always work. In fact, experts facetiously say that half of all paid advertising is wasted--the problem being no one knows which half. Like radio, newspaper advertising depends on frequency, and on developing an image with the reader (or listener). Developing an image requires a campaign. While major corporations, whose commercials we see every day, spend a lot of money on advertising, they don't necessarily spend a large percentage of their income.

Spending five percent of a project's income is a very high figure. Research indicates continuing education programs usually budget one percent for advertising (when they budget advertising).

Newspaper Stories

News stories are used consistently and frequently to inform the public about the University. The planning committee should prepare news stories as a part of the promotional plan.

The Public Relations Department will advise and assist the committee with newspaper stories, and it will prepare and release stories of special importance.

Several news stories should be used throughout the project and scheduled for release before, during, and after the project.

Radio and Cable TV

Radio announcements are effective, when used as a part of a saturation campaign. A saturation campaign is usually a minimum of six to ten spot announcements a day for a full week immediately preceding the project. Like newspaper advertising, radio advertising is expensive.

TV has been traditionally too expensive for advertising by continuing education providers. The advent of Cable TV has brought prices within reason and regional targeting is possible. However, saturation techniques are still most effective and requires more monies than are usually budgeted for most continuing education activities.

Radio and Cable TV should be used, however, through news releases, public affairs announcements and special public affairs programs. Occasionally, a station will offer free announcements to supplement paid announcements.

Radio stations will assist in preparing copy for paid spot announcements. However, all copy should be reviewed before it is broadcast. Copywriters are accustomed to preparing commercials and for highly competitive enterprises requiring a style which may not be appropriate for a university.

Trade Magazines

Trade journals provide an excellent means to target technical, engineering, scientific, and business clientele. Although often limited to monthly, bi-monthly or quarterly release, great return on advertising investment can be accomplished through this media.

Personal Contacts

The crux of promotional activities is personal contacts. Most personal contacts do not effect immediate response, but they are the indispensable element in long range planning and development.

Continuing Education personnel attempt to spend a major portion of their time making personal contacts which include, in part: calls on businesses and industry, visits to federal, state and municipal agencies, and many types of organizations, association with professional individuals and groups, participation in civic and service affairs, and frequent contact with currently enrolled adults.

House Organs

House organs are magazines or newspapers published for the employees of a specific business or industry. These company periodicals provide an excellent means for contacting specialized groups.

House organs are read by most company employees interested in seeing articles about themselves, their colleagues and friends, and about familiar topics and activities. Therefore, stories dealing with employees attending continuing education activities, employees who are teaching, courses that offer an opportunity for advancement, special programs related to the company's processes are all likely to be included.

Many times editors of house organs will prepare their own stories and features if they are kept informed about Continuing Education activities. Some editors will visit programs in progress for the purpose of taking photographs and reporting activities of their companies' employees.

PROGRAM DELIVERY

The planning committee and all persons involved with a continuing education project must be cognizant of the need to "attend to detail" when delivering a program. The most often-repeated complaints expressed by participants concern items considered "mundane" and often overlooked by program planners. Unfortunately, the literature reveals these are the very things participants remember about programs they have attended, especially if something went wrong.

Therefore, continuing education projects are labor intensive activities which require the commitment and support of all involved University personnel. Some of the detail necessary for successful program delivery is reviewed here to assist in planning this phase of the process.

Pre-Program Activity - Brochures and announcements used to promote continuing education activities should include a registration or pre-registration form. When preliminary registrations are received, the Continuing Education Office promptly acknowledges each reservation. The first impression potential registrants have of the University and the program comes from the promotion literature they receive. The second impression results from the manner in which their pre-registration is handled. Therefore, prompt, courteous and efficient handling of pre-registration is important. At this time the registrants are informed about what to expect when arriving at the program. They should know where to go for final registration, how to travel to the facility, what to bring, what type of clothing is appropriate, where they will be living and eating, where to park their cars, and all other details pertinent to the individual, the program, and the program location.

Before the activity begins, numerous pre-operational details must be accomplished by the personnel assigned to the project. This means working out program schedules, lodging, travel, compensation, and equipment for speakers and instructors. The instructional staff must be informed about when they should arrive, where they will live and eat. The amount of compensation, arrangements for remuneration and travel reimbursement must be communicated. Each speaker, panelist, discussion leader, instructor or academic coordinator requires equipment or materials for the conference.

The facility where the program will be held must be visited to reserve rooms, work out menus, arrange for coffee breaks, select and plan a registration area, and select preparation space for speakers. There is no alternative to personally visiting the program site.

All necessary supplies and materials must be delivered to the conference site prior to the project beginning. In addition, arrangements must be carefully planned and finalized for field trips, tours, banquets, picnics, entertainment, recreation, etc. Previously prepared news stories are released when the project is operating. Clerical assistance needs to be engaged either by employing a part-time secretary (if budgeted) or scheduling a full-time secretary. Notebooks for participants are assembled with instructional materials information about the University, and other materials requested by the staff or selected by the Continuing Education Office.

Generally, each project requires materials, arrangements, or features peculiar to that project. The committee must be aware of all such activities and be prepared to provide the assistance to carry them out by the time the project is operational.

<u>Program Operation</u> - Once the activity begins, whether it is a half-day or five-day project, someone must actually live with the project. Listed here are some of the things required during the operational period:

a. See that rooms are open and set up ahead of time.

b. Have visual aids available and operative when scheduled.

c. Make sure that coffee breaks and receptions are held as scheduled.

d. Be sure that tours, field trips, recreational activities are accomplished as planned.

e. Have conference notes, lectures and pass-out materials copied and distributed on time.

f. Schedule, provide rooms for, and attend staff meetings.

g. Assist with transportation arrangements (staff and registrants).

h. Have registration lists completed, duplicated, and distributed promptly.

i. Be prepared to handle many last minute changes and unplanned details.

j. Etc.

The goal is to have the activity be a positive experience for all participants. An experience which will encourage them to return for future programs and recommend Edinboro University Continuing Education to their friends and colleagues.

EVALUATION AND FOLLOW-UP

Although evaluation and follow-up is accomplished at the conclusion of the program, planning for both activities actually starts when the program is being planned.

Every continuing education activity requires some kind of evaluation. Evaluation is the activity concerned with gathering specific information to find out what happened. Through evaluation, the committee finds out what happened in relation to planning. Generally, how did things go, and what did the participants get out of the experience. The evaluation should be geared to focus on what worked, what did not work, what should be changed or added for the future, and what were some new ideas that came out of the experience.

The most common evaluation method is a questionnaire that can range from a single page to several pages. Designing the questionnaire requires thought, for it is much more than just phrasing a couple of questions. The questions should be clear and structured to be easily answered by the participants. Questions can be structured as closed or open-ended inquiries. With a closed question, the choices of the respondent are limited to a "yes" or "no" or to a scale, such as "excellent" to "poor." When using a scale, an even number of choices (usually four to six) should be used to eliminate the possibility of respondents automatically taking a middle-ground position. An open-ended question requires the respondent to write out replies, and some may be reluctant to devote the time or may have difficulty expressing themselves. Both types of questions can be combined by providing a pace for comments after closed responses. Questionnaires, and the process for collecting them, should be made as simple and non-obtrusive as possible.

The most frequently evaluated element of a program is the speakers or presenters. Presenters should be evaluated separately from the overall program evaluation and in terms of their specific sessions rather than broad generalizations. The overall evaluation can be done at the conclusion of the program and should review the program topics, design, site, marketing and registration procedures.

Participants sometimes complain that the topic conveyed to them did not accurately represent the thrust of the program, and the participants' feedback on the topic can be helpful in developing future programs.

Program design should be evaluated, and some questions to be answered are: Was the program held at the right time of year? Was the length of the program appropriate? Were sessions too long or too short? Was the flow appropriate? etc.

Evaluation of the site is important for many reasons; if it does nothing else, it provides an opportunity for participants to vent their frustrations about site factors that are essentially outside the purview of the planners or presenters. The data might provide important insights for site personnel, and can be helpful when selecting the next site for the same group or type of participants.

The evaluation should also uncover which marketing strategies worked and which did not, determine the effectiveness of direct mail pieces or print advertising, and obtain suggestions from participants and suppliers for future marketing efforts.

As mentioned above, the registration process is essential to establishing the climate of the program. Some questions to be answered by the evaluation are: Was registration handled in an efficient manner? Was the process simple and clear? Were the hours and place suitable? etc.

Analysis of the evaluation data is extremely important to see what they tell about the program, the presenters, marketing, and the various other elements about which data were gathered. The two main uses of the results are for feedback on the activity just concluded and for planning future programs. A summary of the evaluation results can be shared with the respondents as part of the overall marketing plan.

The evaluation can also produce good suggestions from participants and others; suggestions and ideas that should be retained for designing future programs. A review of the information from the evaluations should be the first step in pre-planning future programs. All documents from the program should be saved as they can provide a solid base for future planning.

Other follow-up activities which provide good public relations and supplement future marketing efforts are thank you letters to paid and volunteer program staff, suppliers, and other organizations or persons who may have provided (planned or unplanned) assistance with the activity.

A post-program meeting of the planning committee should be held as soon after summaries and reports have been completed, expenses reimbursements, remunerations and purchases have been paid, equipment has been returned and all other details pertaining to the program have been accomplished. Post-program analysis often is the final follow-up activity of the current program as well as the pre-planning session for a future project.

CONCLUSION

The Institute's goal is to provide quality University learning activities which meet client needs and sustain subsequent continuing education/public service efforts. To accomplish such a goal each continuing education effort must be organized through a deliberate approach. It is hoped these guidelines will assist in this University effort and help in the development and delivery of continuing education programming which will serve the mission and priorities of Edinboro University of Pennsylvania.

APPENDIX ONE

The Pre-Planning Review Form is available from the Institute for Research and Community Service.

APPENDIX TWO

This Planning Calendar is available from the Institute for Research and Community Service.

APPENDIX THREE

This Notice of Program Activity/Target Dates is available from the Institute for Research and Community Service.

APPENDIX FOUR

This Non-Credit Program Budget and Fee Development Form is available from the Institute for Research and Community Service.

APPENDIX FIVE

This Course Evaluation Form and Demographic Survey is available from the Institute for Research and Community Service.