

CLARUS
CORPORATION



Marketing Solutions For Community Colleges



Community
College
of Philadelphia
www.ccp.edu

Employer Scan Results

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Community College of Philadelphia
Executive Summary

Executive Summary

Purpose

In 2005, the Community College of Philadelphia contracted with CLARUS Corporation to assess the image of the College with the employers and to determine the employers' needs for education and training. The Employer Scan (2005) provided the basis of the marketing plan for Community College of Philadelphia's *Corporate Solutions*, which is charged with providing education and training to the employers in Philadelphia. A major goal of the administrative team at Community College of Philadelphia based on the results of the Employer Scan (2005) was to increase familiarity and awareness of the College and *Corporate Solutions* among the employers in the City. To accomplish this objective, additional funds were committed to marketing Community College of Philadelphia and the *Corporate Solutions* division. As a condition of the additional funding, an assessment would be conducted in three years to assess the change in familiarity and awareness among the employers in the City. A summary of the change in awareness and familiarity for Community College of Philadelphia and *Corporate Solutions* from 2005 to 2009 follows.

Summary Of Results

- **Employers' usage of Community College of Philadelphia has increased from 2005 to 2009.** Ten (9.8) percent of the employers in 2005 had used the College as an educational resource or a training provider. By 2009, 12 percent of the employers have used the College as a resource or a training provider. Overall, there has been a 22 percent increase from 2005 to 2009 of employers who have used the College. The major increase in usage has been in the utilization of the College as a training location and an increase in the percentage of employers who have served on an advisory committee.
- **Employers are less likely to use Community College of Philadelphia in the future.** The survey was conducted during a recessionary period in 2009, compared to the economic outlook in 2005. Employers noted they are more likely in 2009 to serve on an advisory committee, provide internship opportunities to students, use the College as a conference facility, and to send employees to training at Community College of Philadelphia. But the employers are less likely to have training programs developed for their employees and to provide credit classes and degree programs on-site at their businesses, and are less likely than in 2005 to use the College as a source of employees.
- **The media being used by Community College of Philadelphia has been effective in reaching the employers.** Almost half of the employers surveyed have seen or heard the advertising placed by the College. Fifty-three percent of the employers surveyed in 2009 recall a bus or transit ad for Community College of Philadelphia in the last year. Forty-seven percent of the employers recall seeing a newspaper ad about the College in the last year and 46 percent have heard a radio ad for the College. Forty-two percent of the employers recall seeing a television commercial for Community College of Philadelphia in the last year and 35 percent saw a billboard in the last year.
- **Community College of Philadelphia's tagline, "The Path To Possibilities," has excellent recognition among the employers in Philadelphia.** The tagline for the College resulting from the 2005 brand campaign was "The Path To Possibilities." In a test of aided recall, 48 percent of the employers surveyed correctly named Community College of Philadelphia's tagline when compared to the taglines for Drexel University, LaSalle University, Penn State, and Saint Joseph University.

- **Sub-branding *Corporate Solutions* will need additional time and resources.** A major focus of the marketing plan started in 2006 was to increase the visibility of Community College of Philadelphia among employers, as well as the newly renamed business and industry training division, *Corporate Solutions*. Since *Corporate Solutions* did not exist, per se, in 2005 there is no baseline for the usage of the entity known as *Corporate Solutions*. However, in the 2009 survey of employers, a baseline of usage and media recall has been created. Three percent of the employers surveyed have used *Corporate Solutions* at Community College of Philadelphia and for the 10 employers in the market that have used it, they have been active users: they have attended a breakfast for businesses hosted by *Corporate Solutions*, have had training developed for their employees by *Corporate Solutions*, have had their employees attend a training at Community College of Philadelphia, used a building at the College for a conference or training location, and have had *Corporate Solutions* provide training at their business. Direct mail and printed materials have been the most effective in creating recall among the employers for *Corporate Solutions*. Five percent of the employers recall receiving information in the mail from *Corporate Solutions* in the last year and four percent recall brochures about *Corporate Solutions*. Three percent of the employers recall a *Corporate Solutions* business breakfast in the last year and two percent business networking events.
- **The major attributes defining a community college market position have been strengthened from 2005 to 2009 among the employers.** The employers in Philadelphia in 2005 and 2009 were asked to identify the college characteristics that could be attributed to a community college, a technical college, and four-year colleges and universities. The major attributes attributed to community colleges were even more strongly associated with community colleges in 2009: affordability, convenient class schedules, individual attention, remedial or developmental education, continuing education and career skills for employees, convenient locations, and preparing the unemployed for work. The attributes which fewer employers attributed to community colleges in 2009 compared to 2005 included source of employees, high-quality instruction, and up-to-date curriculum.

Community College of Philadelphia

Methodology

Study Design

Purpose

In 2005, the Community College of Philadelphia contracted with CLARUS Corporation to assess the image of the College with the employers and to determine the employers' needs for education and training. The Employer Scan (2005) provided the basis of the marketing plan for Community College of Philadelphia's *Corporate Solutions*, which is charged with providing education and training to the employers in Philadelphia. A major goal of the administrative team at Community College of Philadelphia based on the results of the Employer Scan (2005) was to increase familiarity and awareness of the College and *Corporate Solutions* among the employers in the City. To accomplish this objective, additional funds were committed to marketing Community College of Philadelphia and the *Corporate Solutions* division. As a condition of the additional funding, an assessment would be conducted in three years to assess the change in familiarity and awareness among the employers in the City. This report provides a detailed analysis of the change in awareness and familiarity for Community College of Philadelphia and *Corporate Solutions* from 2005 to 2009.

Research Questions

Specifically, the research questions for the survey of employers included:

- What is the usage of Community College of Philadelphia by the Philadelphia employers?
- How likely are the employers to use Community College of Philadelphia in the future for education and training?
- What is the recall of media sources for Community College of Philadelphia?
- What is the market recognition of Community College of Philadelphia's logo, tagline, and colors?
- What is the image of Community College of Philadelphia with the employers in the City?
- What is the usage of *Corporate Solutions* by the Philadelphia employers?
- What is the recall of media sources for *Corporate Solutions*?

Sampling Frame

The population of interest for this employer assessment was the employers located in the city of Philadelphia, which is comprised of specific zip codes of 19101, 19102, 19103, 19104, 19105, 19106, 19107, 19110, 19111, 19112, 19114, 19115, 19116, 19118, 19119, 19120, 19121, 19122, 19123, 19124, 19125, 19126, 19127, 19128, 19129, 19130, 19131, 19132, 19133, 19134, 19135, 19136, 19137, 19138, 19139, 19140, 19141, 19142, 19143, 19144, 19145, 19146, 19147, 19148, 19149, 19150, 19151, 19152, 19153, 19154, 19155, 19160, 19171, and 19175. Exhibit 1 presents the number of employers in the city of Philadelphia by employer size.

Exhibit 1. Sample Frame For Employer Scan

Size Of Employers (number of employees)	2009 Employers From Selected Philadelphia Zip Codes
1-4	21,000
5-9	5,914
10-19	3,609
20-49	2,054
50-99	795
100-249	515

Size Of Employers (number of employees)	2009 Employers From Selected Philadelphia Zip Codes
250-499	129
500-999	51
1000-4999	41
5000-9999	7
10,000+	10
TOTAL	34,125

A list of employers was purchased from a company specializing in business lists for employers with 20 or more employees. The list for the service area was sorted by SIC code, then sorted by employee size – interviews started with the largest employers and moved down the list until the 400 surveys were completed across the SIC code parameter. This sample methodology assured Community College of Philadelphia of successfully completing interviews with a cross-representation of the largest employers across the City.

To ensure a comparable sample for comparative purposes with the 2005 Employer Scan, the same sample methodology was followed for 2009 with one exception. In the Employer Scan in 2005, 80 percent of the employers surveyed were in the city limits of Philadelphia and the remaining 20 percent were in the area outside of the City but located in the MSA of Philadelphia. After consulting with staff at Community College of Philadelphia, it was determined to pull the 2009 sample frame entirely from the employers in the city of Philadelphia since the majority of the marketing had concentrated on the employers in the City.

Reliability Estimation

The reliability estimation for the sample was based on the total number of businesses in the service area. The sample of 400 businesses provided a reliability of 95 percent and a tolerable error of ± 4.9 percent. In other words, if 100 different samples of 100 businesses in the service area were chosen randomly, 95 times out of 100 the results obtained would vary no more than ± 4.9 percentage points from the results that would be obtained if all of the employers in the service area were interviewed. The Employer Scan in 2005 also had a reliability of 95 percent and a tolerable error of ± 4.9 percent with a total of 400 surveys completed.

Instrument Design

On the basis of the data gained in the preliminary interviews on the campus of Community College of Philadelphia, a draft of a telephone survey was developed and presented to the Project Management Group at Community College of Philadelphia. CLARUS Corporation and Community College of Philadelphia reviewed this draft in detail for additions, deletions, and revisions. The survey was based on a survey master that has been used to interview more than 25,000 businesses in the last 15 years about their educational needs. The instrument basis has been found to provide extremely reliable and valid results.

It was the responsibility of CLARUS Corporation to write and sequence the questions in such a way that any respondent bias was minimized and the questions were technically correct. The final survey was pretested to ensure that question wording and sequencing were structured as needed. A copy of the final instrument is presented in Appendix A.

Data Collection

Telephone surveys were the primary method of data collection. Each telephone interview lasted approximately 10 minutes. Employers were first called, told the purpose of the survey and then asked to set a time convenient for the interview. The interviewers then called the employers back at the appointed time to complete the interview. These 400 interviews were conducted April 27 to May 20, 2009 by CLARUS Corporation interviewers who have previous experience in educational services interviewing with busy business owners and executives. The Employer Scan in 2005 was conducted November 21 to December 19, 2005.

The interviewers conducting the telephone interviews were subjected to rigorous hiring and training procedures before making their first phone call. Before interviewing began, the interviewers went through a thorough question-by-question briefing of the questionnaire. During actual interviewing, each interviewer was monitored for one complete questionnaire and monitored randomly after that.

Data Analysis

After the data were collected, verification of the data began. The data were examined to ensure that procedures were followed in data collection and checked for internal validity by cross-matching answers per respondent. The data were then coded for processing and analysis. SPSS (Statistical Package for the Social Sciences) was used to analyze the data and the data disks will be made available to Community College of Philadelphia for additional subset analyses.

Reporting

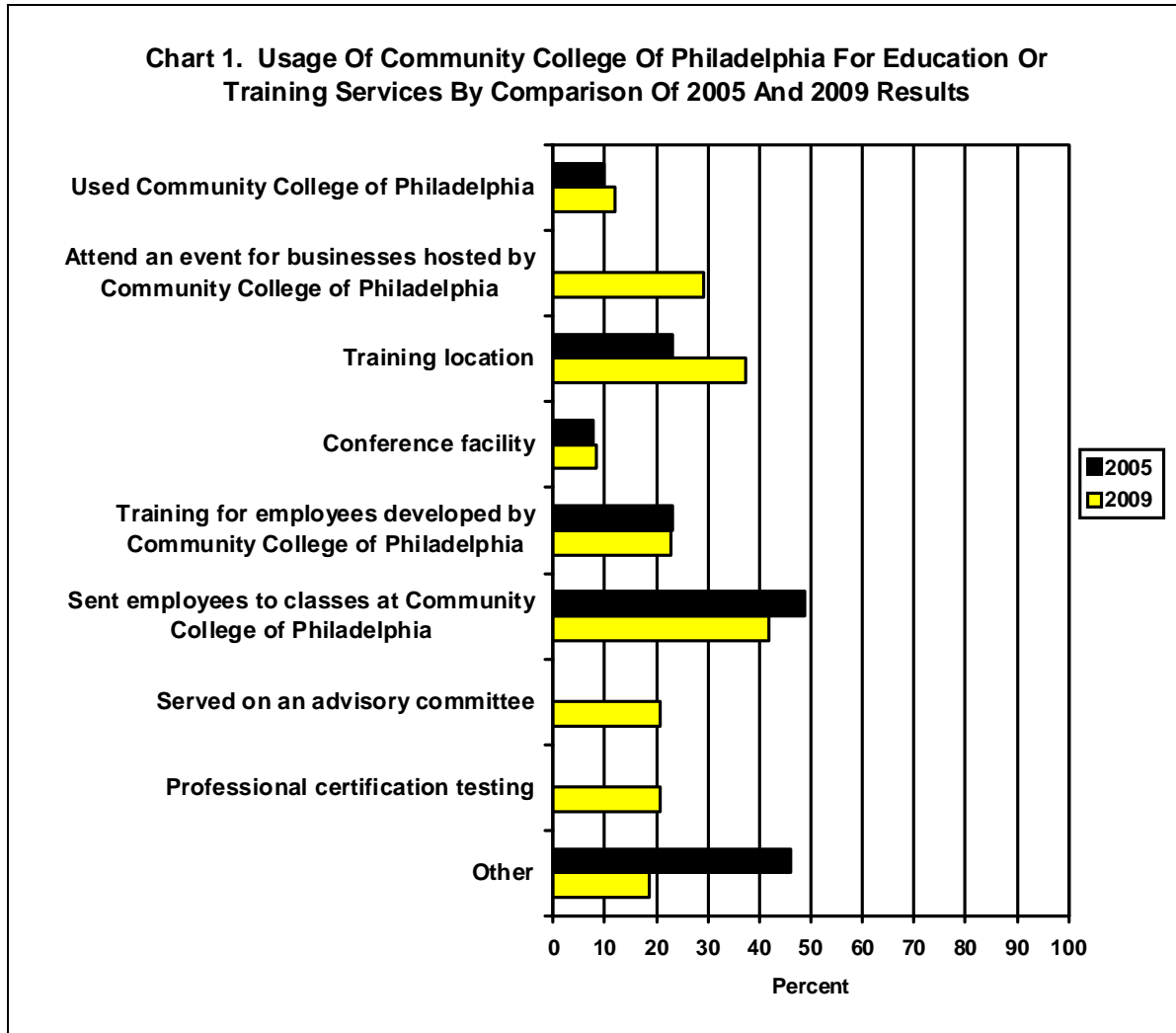
The results of the data are organized into a graphic and narrative report as well as detailed tabular results. This report focuses on the most meaningful findings of the research. The format used has the results summarized in a chart or graphic and pertinent comments below. To make reporting the results more meaningful to Community College of Philadelphia, the results will be compared with the 2005 Employer Scan. The legends on the charts in the report are titled “2009” representing the results of the Employer Scan in 2009 and “2005” representing the responses of the employers in the Employer Scan in 2005. Differences between the groups will be reported where they exist. A complete set of tabular results by frequency and percentage for employers by size of employer (less than 100 employees and 100 or more employees) is presented in Appendix B. A complete set of tabular results by frequency and percentage for the 2005 and 2009 results comparison is presented in Appendix C. The tabular results should serve as reference materials and should be consulted before important conclusions are made. Due to SPSS labeling specifications, some of the longer verbatim responses are cut off in the tables. The complete text for those responses is presented in Appendix D.

Community College of Philadelphia

Results

Community College Of Philadelphia

The more familiar employers are with a college and the more they use the services of a college, the more likely the employers will look to the college first as a resource. The employers in Philadelphia were asked if they have ever used Community College of Philadelphia as a resource for education or training for their company’s employees.



Employers’ Usage Of Community College Of Philadelphia. Ten (9.8) percent of the employers in 2005 had used the College as an educational resource or a training provider (see Chart 1). By 2009, 12 percent of the employers have used the College as a resource or a training provider. Overall, there has been a 22 percent increase from 2005 to 2009 of employers who have used the College.

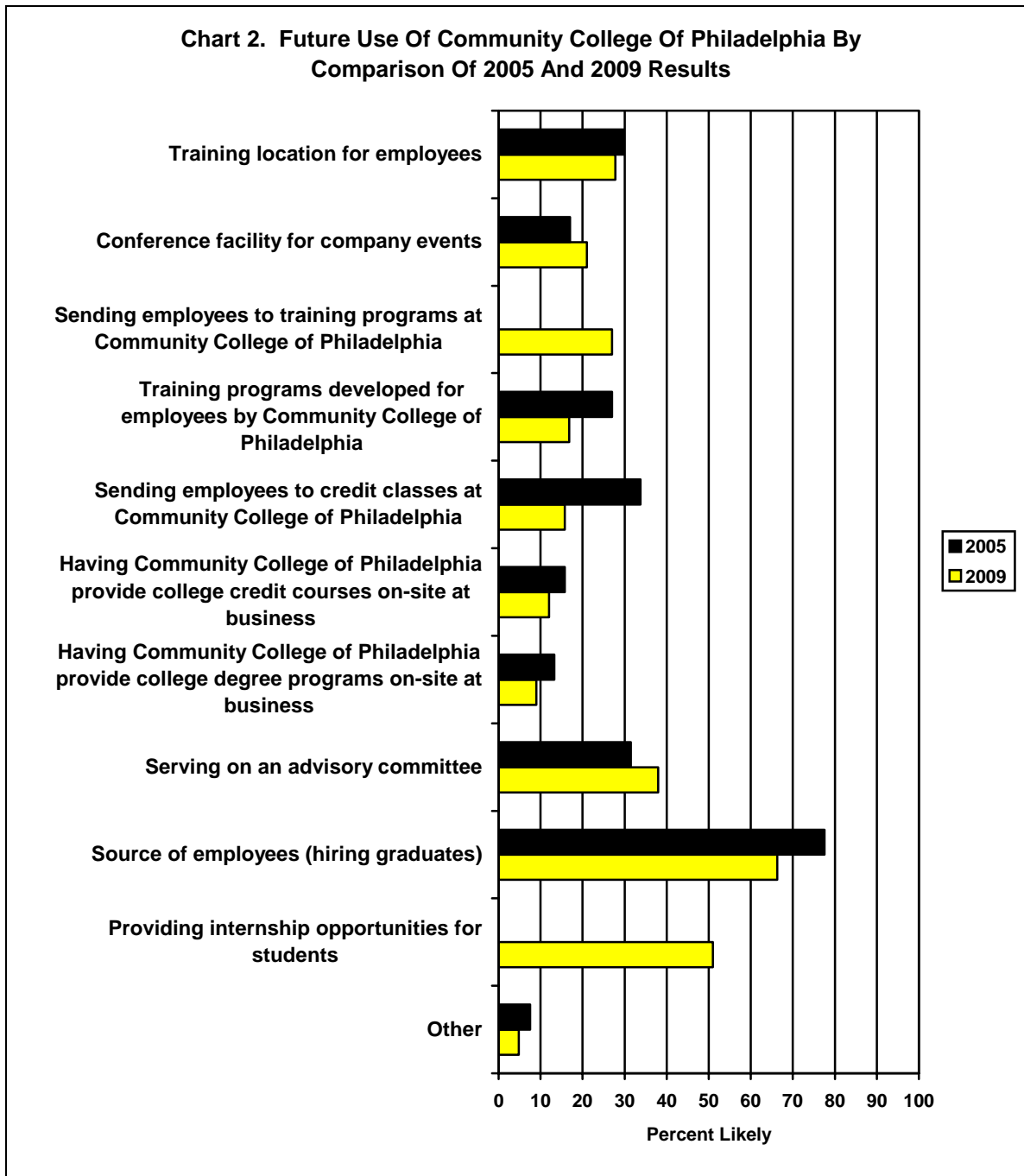
The major increase in usage from 2005 to 2009 for those employers who have used the College was in the utilization of the College as a training location – 23 percent of the employers who had used the College in 2005 had used it for a training location but by 2009, 38 percent of the employers had used the College as a training location. There has also been an increase in the percentage of employers who have served on an advisory committee. In 2005, none of the employers had served on an advisory committee but by 2009 21 percent of the employers have served on an advisory committee.

Usage has remained the same from 2005 to 2009 with respect to using the College as a conference facility – eight percent of the employers used the College as a conference facility in 2005 and in 2009. The percentage of employers who have used Community College of Philadelphia for training for their employees also remained the same in 2005 and 2009 – 23 percent have used the College for training. There has been a slight drop in the percentage of the employers who have sent employees to classes at Community College of Philadelphia in the last four years. In 2005, 49 percent of the employers sent employees to classes at the College but by 2009, only 42 percent of the employers sent employees to classes at the College.

Employers were asked about two additional uses of Community College of Philadelphia in the 2009 survey that were not asked in 2005. In 2009, 29 percent of the employers reported they had attended an event for businesses hosted by Community College of Philadelphia and 21 percent used the College for professional certification testing. In 2005, 46 percent of the employers noted other uses of the College, specifically: job fair (11 percent), assistance nursing program, emissions licenses, employees elected to do DNA class, employees went there on their own, English as a second language, for temporaries to fill in, hire interns, hired people from Community College of Philadelphia, internships we do here from Community College of Philadelphia, new hires from there, off-site language, on-site LPN to RN, posted positions there, recruiting, they came and provided courses here, and web net program.

By 2009, only 19 percent of the employers reported other uses of the College. Those uses included 10 classes a semester here, CNA, computer course, on-site/ Microsoft applications, placement testing, students go there, web eye, went to employee fair, and web net program.

In the 2005 survey, the 341 employers who responded they had not used the services of the Community College of Philadelphia were asked why. Key reasons cited for not using the Community College of Philadelphia included: not needed, do all in-house, location, and not aware of what is there. In 2009, 305 employers did not use the services of the College. Although the College has made progress since more employers have used the College from 2005 to 2009, the primary reasons for not using the College are basically the same in 2009 as they were in 2005 – not needed, not aware, and do all training in-house.



Future Usage Of Community College Of Philadelphia. Employers are slightly more likely to use the Community College of Philadelphia as a conference facility for company events and serve on an advisory committee in 2009 than they were in 2005. In 2005, 17 percent of the employers reported they would be likely to use the College as a conference facility for company events but by 2009, 21 percent of the employers would be likely to use the College. Only 32 percent of the employers were likely to serve on an advisory committee in 2005, but 38 percent would be likely to serve on an advisory committee in 2009.

From 2005 to 2009, employers are less likely to use the College for a training location for employees, have the College develop training programs for employees, send employees to credit classes at Community College of Philadelphia, have the College provide credit programs or degrees at their site, and

use the College as a source of graduates. The fact that many of the employers are less likely to use the College for training in 2009 may be a reflection of the economic issues facing employers nationally – many are cutting training budgets in these turbulent economic times. In 2005, 30 percent of the employers were likely to use Community College of Philadelphia as a training location for employees, and in 2009 28 percent of the employers are likely to use Community College of Philadelphia as a training location in the future. Only 17 percent of the employers are likely to use Community College of Philadelphia to develop training programs for their employees in the future, compared to 27 percent in 2005. Sixteen percent of the employers reported they are likely to send their employees to classes at Community College of Philadelphia in 2009, compared to 34 percent in 2005. Fewer employers want classes and degrees held on-site in 2009 – only 12 percent of the employers are likely to want Community College of Philadelphia to teach credit classes on-site (compared to 16 percent) and nine percent want degrees taught on-site in 2009 (compared to 13 percent in 2005). Two-thirds of the employers are likely to hire graduates from Community College of Philadelphia and use them as a source of employees in 2009, but that too has dropped from 78 percent of employers in 2005.

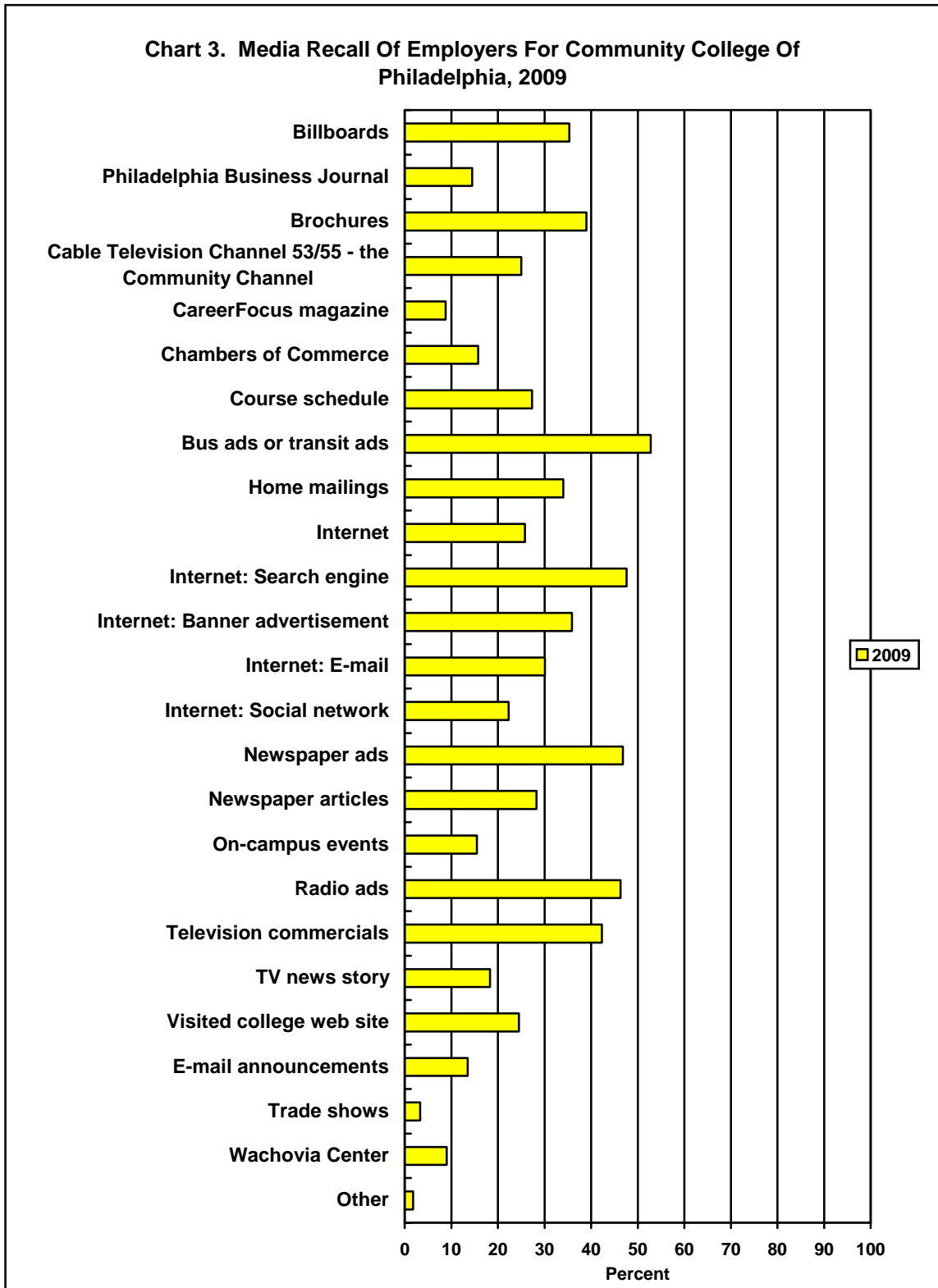
Two new uses of Community College of Philadelphia were introduced in the 2009 survey – sending employees to training programs at Community College of Philadelphia and providing internship opportunities for students. Twenty-seven percent of the employers noted they would be likely to send their employees to training programs at Community College of Philadelphia. Fifty-one percent of the employers noted they would be likely to provide internship opportunities to students.

Eight percent of the employers in 2005 cited other potential ways they would use Community College of Philadelphia, and those included: job fairs (six percent), job posting (six percent), campus recruiting, center or satellite closer to us, class teaching techniques/ truck and auto mechanics, client/ advanced education, clients go there, come to open house meeting here, contact person for posting, course for beginning managers/ trade staff to supervision, ESL and computer classes, food service program, future employees/ internships, I called the College and got no response for employees, internship program/ open house to recruit, internships, job fairs/ recruiting, job placement/ job posting, locations, offer law school classes at Northeast Campus, post notices to get employees, prepare for a four-year college, research for information, source for summer employees, special purpose seminars, suggest they pursue a relationship with local union 274, training for skills for adolescents, we're looking at recruitment at the time, and work through Philly school district/ food service management.

In 2009, a key other use mentioned by the employers was having Community College of Philadelphia play a role in recruitment – for example, setting up a recruiting network or sponsoring a recruiting event. The other potential future uses of Community College of Philadelphia as noted by the employers in 2009 include: executive training/ communications, financial aid workshop/ SAT workshops, further education, grants, if something offered, job requirement, mentorship programs/ artists, presentation or lecture on child psychology, recruiting freelance reporters, recruiting network/ that might be good to set up, safety tips, safety/ lead or green building certifications, waiting for on-site training to be worked out, we would use interns from a culinary school, workshops, would like to collaborate with Community College of Philadelphia, and job fairs.

Media Recall

It is very important for a college to continue to be visible to the employers in their local service area. Employers were asked from what sources they had seen or heard information about Community College of Philadelphia in the last year. The more the employers recall the information being distributed by the College, the greater the awareness. The results of the awareness test for media for 2009 are presented in Chart 3. There was not a baseline of media awareness for the employers in 2005 for comparison.



Employers in Philadelphia responding to the survey were asked from which media they have seen or heard information about Community College of Philadelphia in the last year. The goal of this question was to determine if the media being used by the College to increase awareness and familiarity with one of the College’s key markets – the employers – was reaching the market. As seen in Chart 3, the media being

used by the College has been effective, and almost half of the employers have seen or heard the advertising being placed by the College. Fifty-three percent of the employers surveyed in 2009 recall a bus or transit ad for Community College of Philadelphia in the last year. Forty-seven percent of the employers recall seeing a newspaper ad about the College in the last year and 46 percent have heard a radio ad for the College. Forty-two percent of the employers recall seeing a television commercial for Community College of Philadelphia in the last year and 35 percent saw a billboard in the last year.

Employers are less likely to recall printed materials about the College. Thirty-nine percent of the employers reported seeing brochures about the College during the last year and 34 percent recall seeing something mailed to their home about the College. Only 28 percent recall seeing a newspaper article about the College and 27 percent recall seeing a class schedule in the last year. Given that some of the employers live outside of the service area of Community College of Philadelphia, the lower recall for materials received at home is not of concern.

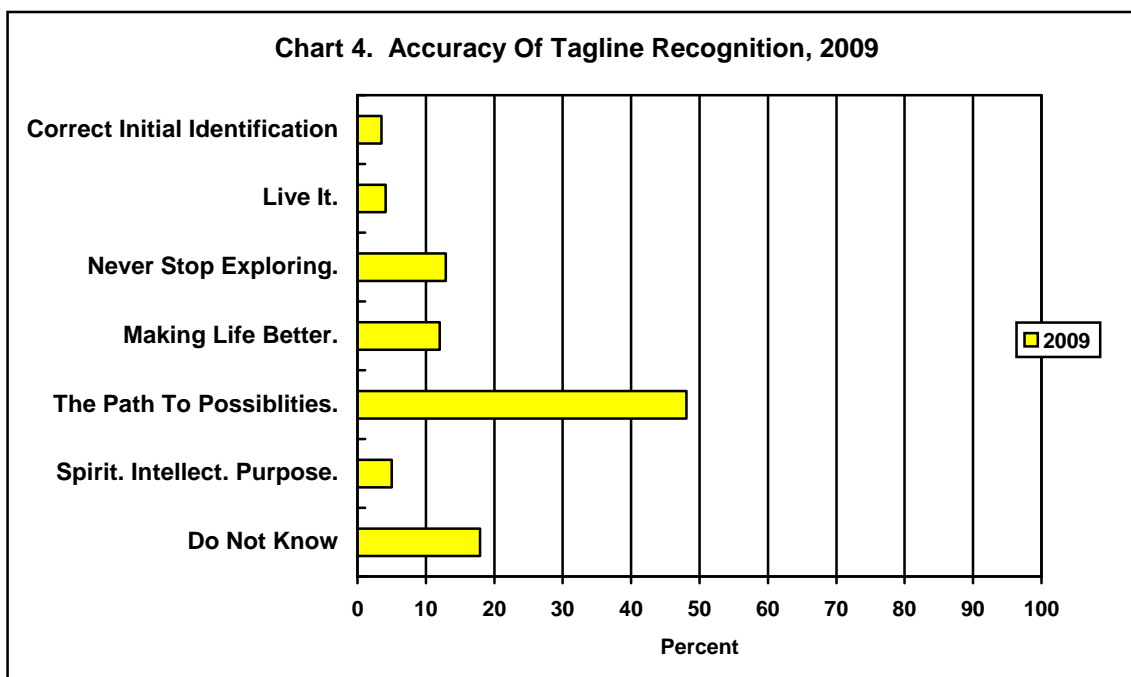
Slightly more than one-fourth (26 percent) of the employers recalled seeing something about Community College of Philadelphia on the Internet in the last year. For those that did recall seeing information about the College online, they were asked where they saw the information. Forty-eight percent of the employers who gained information about Community College of Philadelphia online in the last year used a search engine, while 36 percent saw an online banner ad about the College, 30 percent received an e-mail, and 22 percent gained information from a social network.

One-fourth of the employers noted they had seen information about Community College of Philadelphia on the College's cable channel – Cable Television Channel 53/55, or the Community Channel. Twenty-four percent of the employers did visit the College's web site to gain information. Less than 20 percent of the employers saw or heard information about Community College of Philadelphia through: TV news story (18 percent), Chambers of Commerce (16 percent), on-campus events (16 percent), Philadelphia Business Journal (14 percent), e-mail announcements (14 percent), Wachovia Center (nine percent), CareerFocus magazine (nine percent), and trade shows (three percent).

Two percent of the employers noted other sources from which they had seen or heard information about Community College of Philadelphia in the last year and those included: 2009 career fair, church announcements, e-mail for recruitment purposes, probably have seen but do not pay attention, serve on a board that talked about it, social services board, and walk by it every day.

Market Recognition

Translating brand language into action is often a challenge, but the strength of the brand depends on the clarity and consistency of the communications that convey it. The consistent use of taglines, logotypes, color, and visual identity in concert should convey the spirit of a college's brand platform in the mind of all constituents. In this section, the employers were asked to share their recognition with the Community College of Philadelphia's visual identity. This is not a test of positive or negative – but a test of recognition.

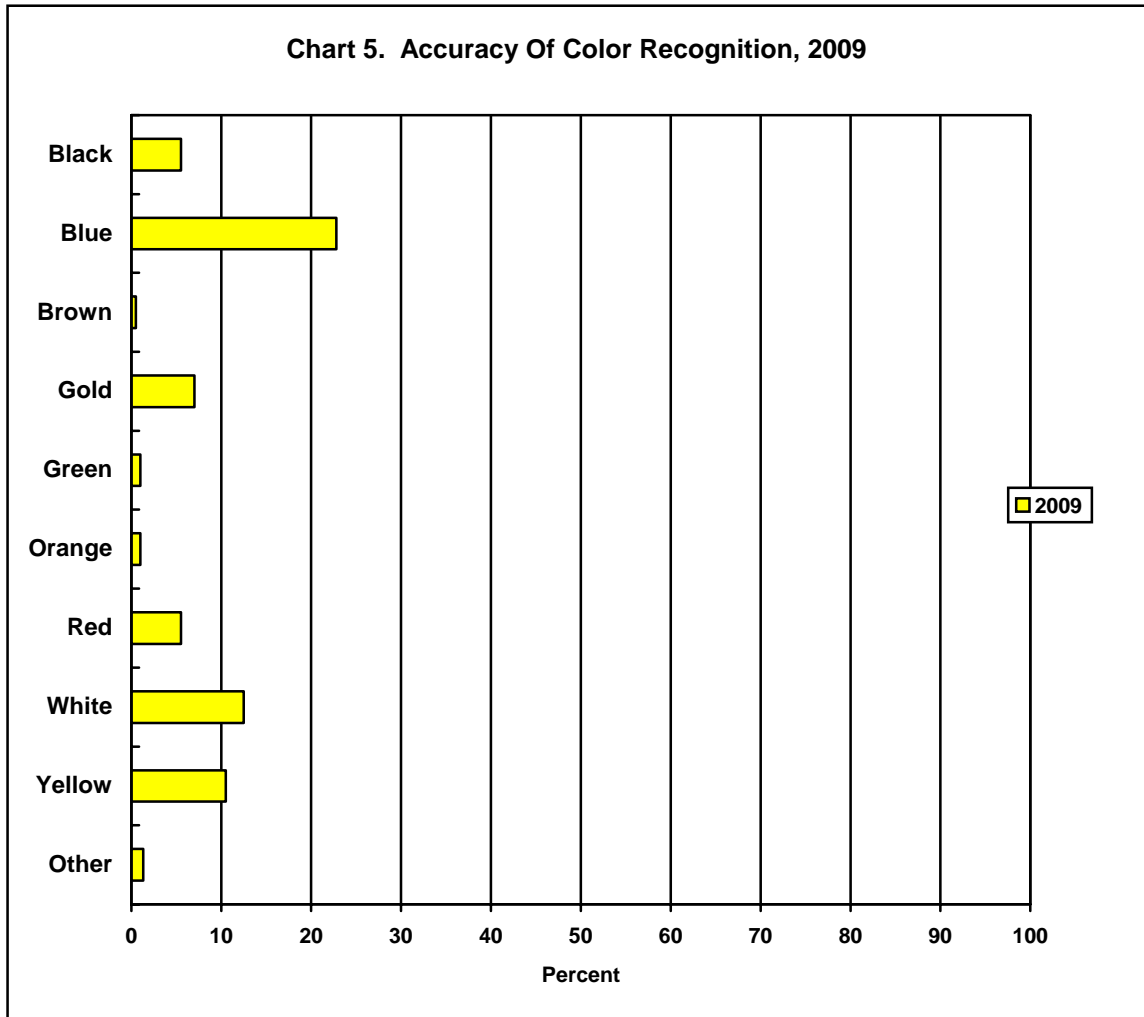


Tagline Recognition. A tagline is a creative, memorable expression of the institution's mission and brand. It translates the internally focused competitive advantage statement into an external phrase or slogan that captures the essence of the brand. A tagline should generate an immediate, sometimes emotional, reaction. Employers were asked to state the slogan or tagline for Community College of Philadelphia (unaided recall). If the respondent said "The Path To Possibilities," it was identified as a correct response. If the respondent did not know the slogan, they were read a list of taglines for Community College of Philadelphia and nearby competitors and asked to identify the correct tagline (aided recall).

As seen in Chart 4, only four percent of the employers were able to provide the correct slogan for the Community College of Philadelphia in the test of unaided recall. In other words, four percent of the employers immediately responded, "The Path To Possibilities" when asked for the slogan for the College. Ninety-six percent of the employers were then prompted with five taglines representing institutions in Philadelphia. Forty-eight percent of the employers correctly named Community College of Philadelphia's tagline, "The Path To Possibilities," in the test of aided recall.

Four percent of the employers incorrectly identified Drexel University's tagline, "Live It," as the Community College of Philadelphia's tagline. LaSalle University's tagline, "Never Stop Exploring," was attributed to Community College of Philadelphia by 13 percent of the employers, making it the most incorrectly recognized tagline. "Making Life Better," Penn State's tagline was incorrectly attributed to Community College of Philadelphia by 12 percent of the employers. Only five percent of the employers incorrectly identified "Spirit, Intellect, Purpose.," Saint Joseph University's tagline for Community

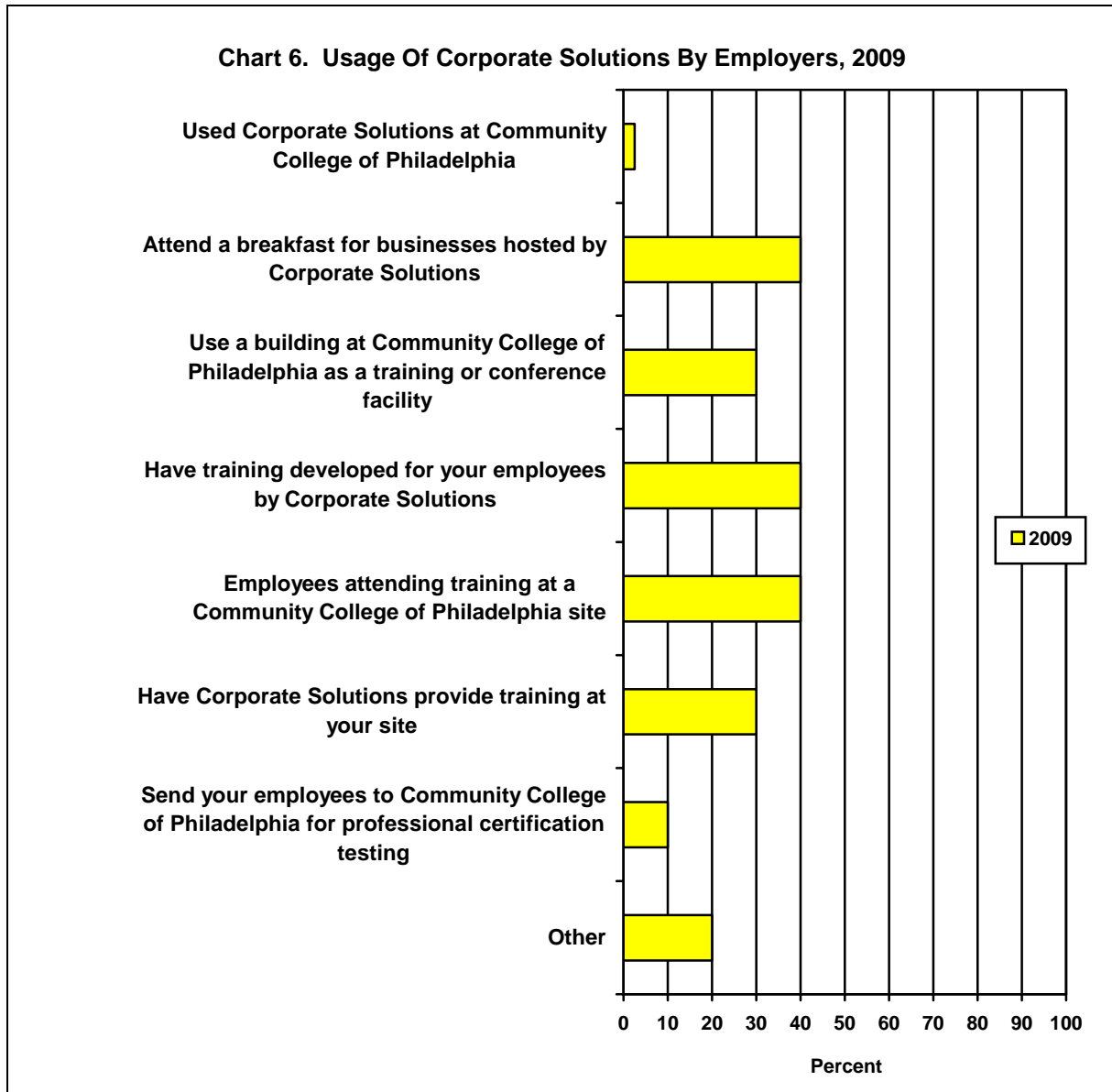
College of Philadelphia. Overall, 18 percent of the employers simply did not know which tagline represented Community College of Philadelphia in the aided recall.



Color Recognition. Color is the most recognizable element of identity and should evoke immediate recognition of a brand or organization. Market segments can react to a color even faster than a logo for some organizations. Color evokes emotion and is more easily remembered than words. Community College of Philadelphia has adopted a yellow and black color scheme in their new advertising. The yellow version of the logo (PMS 123) is used when it appears on a black background.

The employers were asked to identify the principal colors of the Community College of Philadelphia. As seen in Chart 5, one-fourth of the employers recalled blue as the major color, with 12 percent recalling white, 10 percent yellow, seven percent gold, six percent black, and six percent red. One percent or less identified Community College of Philadelphia’s colors as orange, green, or brown. The College still has to continue to work to be very consistent in color to institutionalize the new advertising colors in the employers’ minds to make them highly recognizable.

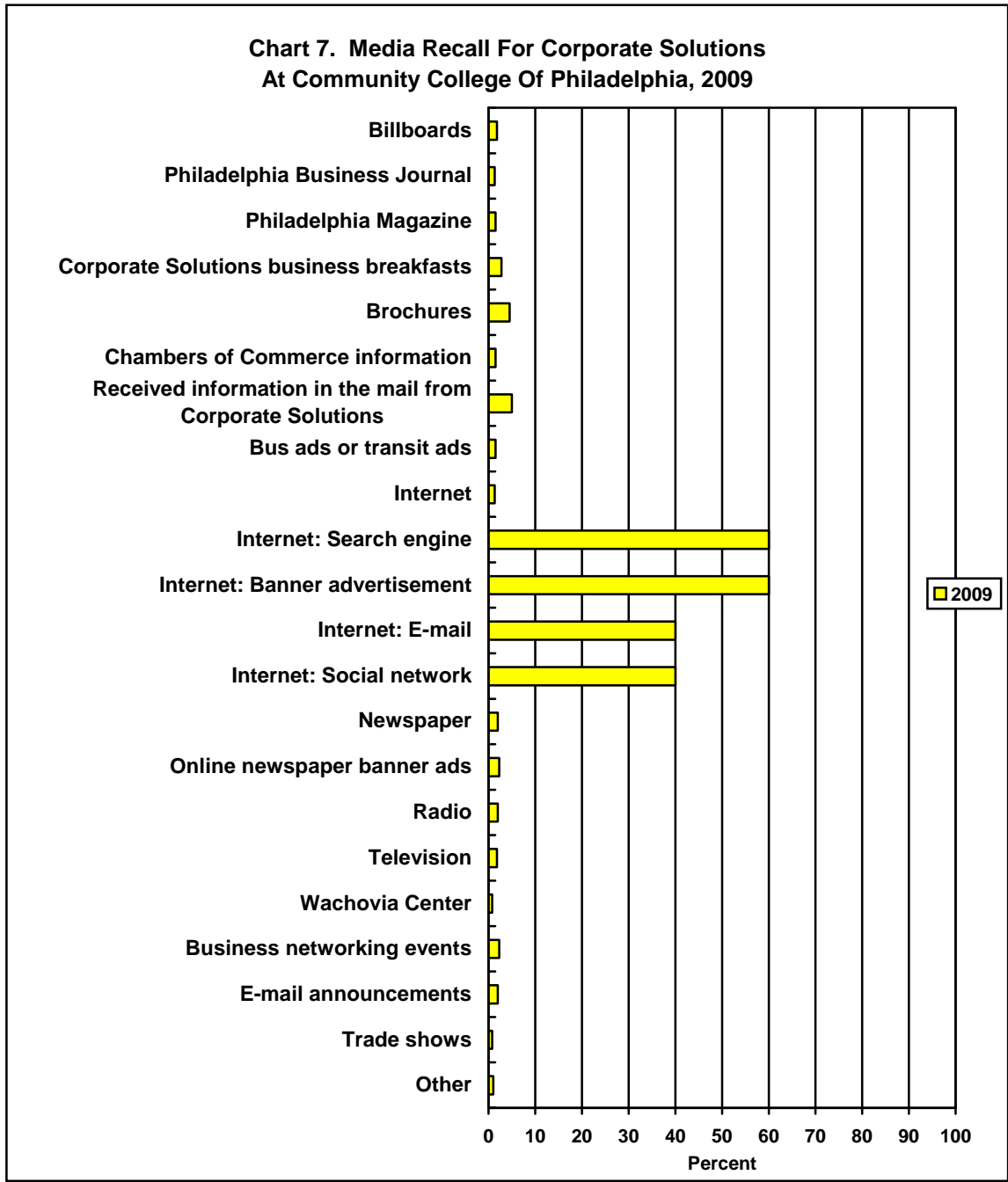
Corporate Solutions



Usage Of Corporate Solutions. A major focus of the Employer Scan in 2005 was to increase the visibility of Community College of Philadelphia’s workforce training division with the employers in the market. The division was renamed *Corporate Solutions* and a marketing plan was developed for the division. College advertising was placed in the market to not only reach the potential students and community members, but the employers as well. Since *Corporate Solutions* did not exist, per se, in 2005 there is no baseline for the usage of the entity known as *Corporate Solutions*. The 2009 survey of employers provides the baselines of awareness and usage for future reference.

As seen in Chart 6, only 2.5 percent of the employers surveyed have used *Corporate Solutions* at Community College of Philadelphia. For the 10 employers in the market that have used it, they have been active users. Forty percent of the employers who have used *Corporate Solutions* have attended a breakfast for businesses hosted by *Corporate Solutions*, have had training developed for their employees by *Corporate Solutions*, and have had their employees attend a training at Community College of

Philadelphia. Thirty percent of the users of *Corporate Solutions* have used a building at the College for a conference or training location and have had *Corporate Solutions* provide training at their business. Ten percent of the employers have used *Corporate Solutions* to provide professional certification training. Other uses of *Corporate Solutions* in 2009 mentioned by the employers included a program for RN partnership and tutoring services.



Media Recall Of *Corporate Solutions*. Employers in Philadelphia responding to the survey were also asked from which media have they seen or heard information about *Corporate Solutions* in the last year. The goal of this question was to determine if the media being used by the College was in fact reaching the employers with regard to branding *Corporate Solutions* in the market. Branding a sub-brand is a more difficult task than overall branding for the College, since it has a distinct market, and the

media being used to market the College is not substantially different than the media being used to brand *Corporate Solutions*. As seen in Chart 7, direct mail and printed materials have been the most effective in creating recall among the employers for *Corporate Solutions*. Five percent of the employers recall receiving information in the mail from *Corporate Solutions* in the last year and four percent recall brochures about *Corporate Solutions*. Three percent of the employers recall a *Corporate Solutions* business breakfast in the last year and two percent business networking events. Two percent of the employers recall seeing online newspaper banner ads about *Corporate Solutions* as well as getting an e-mail announcement. Two percent of the employers noted seeing or hearing something about *Corporate Solutions* in the following media: radio, newspaper, television, billboards, bus ads or transit ads, Chambers of Commerce information, and the Philadelphia Magazine. One percent of the employers recalled information about *Corporate Solutions* in the Philadelphia Business Journal as well as online. With respect to those who gained information about *Corporate Solutions* online, 60 percent used a search engine, 60 percent saw a banner advertisement, 40 percent got an e-mail and 40 percent gained information from a social network about *Corporate Solutions*. Less than one percent of the employers gained information about *Corporate Solutions* through a trade show or at the Wachovia Center. One percent of the employers mentioned other sources of media in which they had gained information about *Corporate Solutions* in the last year and those sources included: an employee gave information, communicate with PERSON at college, home mailing, and word of mouth.

Image Analysis

In order to better understand the image of the Community College of Philadelphia, employers were asked in 2005 and 2009 to identify whether a list of common educational characteristics could be attributed to four-year colleges or universities, community colleges, or trade or technical schools. This information provided a clearer picture of how the employers viewed the community colleges – in other words, what attributes they were likely to attribute to community colleges. The chart below presents a comparison of the percentage of employers who attributed an educational characteristic to a community college in 2005 and in 2009.

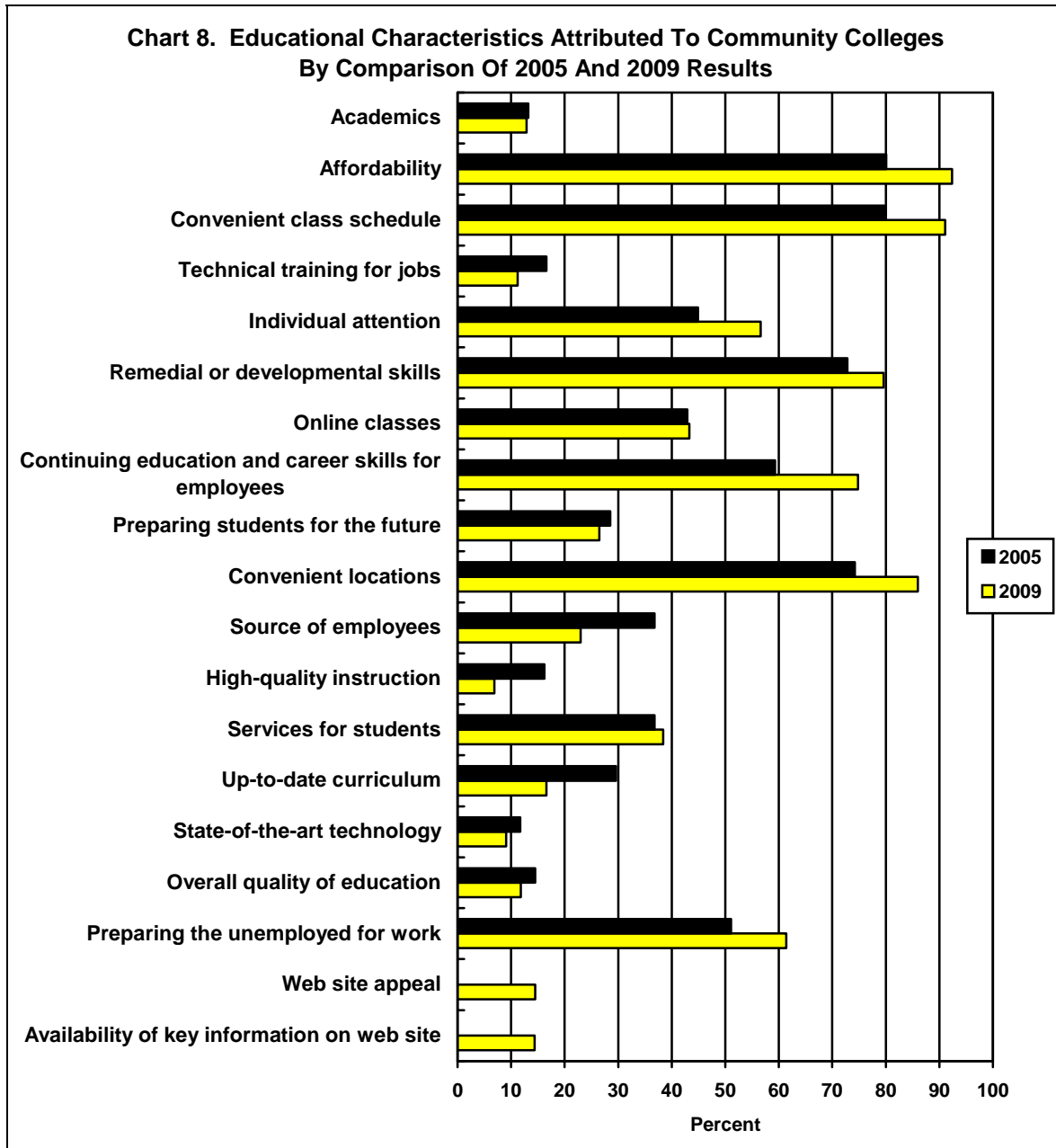


Chart 8 presents the comparison of the percentage of employers in 2005 who attributed an educational characteristic to a community college, rather than a four-year college or university or a technical college,

with the percentage of employers who attributed that educational characteristic to a community college in 2009. Examining the results, the characteristics that employers were most likely to attribute to a community college in 2005 were also the ones attributed in 2009 – and in even greater percentages in 2009. In 2005, 80 percent of the employers attributed affordability to a community college, and in 2009, 92 percent of the employers attributed affordability to a community college. Ninety-one percent of the employers attributed convenient class schedules to a community college in 2009, as did 80 percent in 2005. Even more employers in 2009 noted a community college had convenient locations (86 percent) than they did in 2005 (74 percent). A community college is still recognized as the place for assisting with remedial or developmental skills – 80 percent in 2009 compared to 73 percent in 2005.

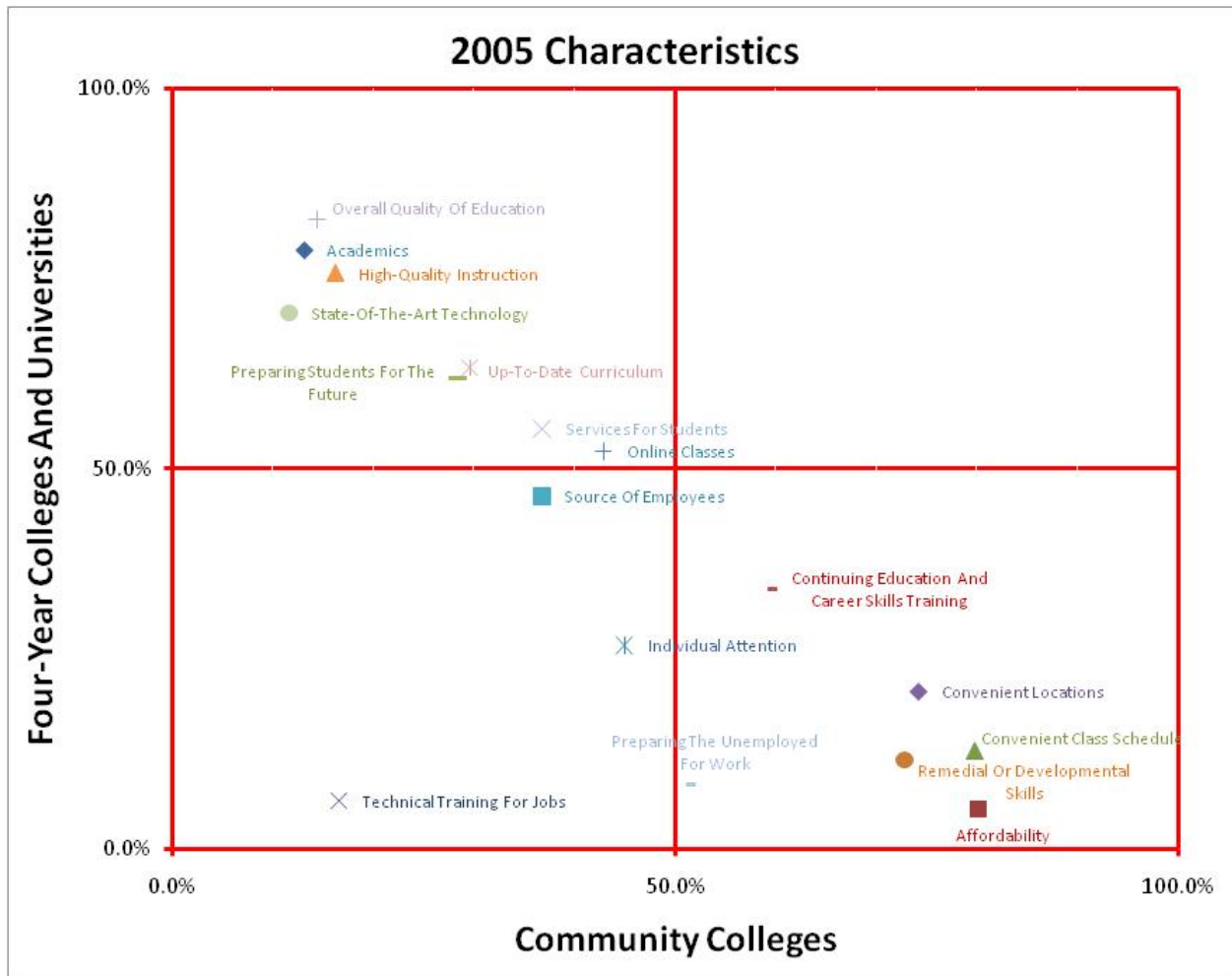
A major increase in awareness among employers has been in providing continuing education and career skills for employees – in 2005, 59 percent of the employers attributed this to a community college but in 2009, three-fourths of the employers attributed it to a community college. Sixty-one percent of the employers see a community college as the place to prepare the unemployed for work in 2009, compared to 51 percent in 2005. More than half of the employers (57 percent) also noted that a community college is the place for individual attention in 2009 (compared to 45 percent in 2005). Thirty-eight percent of the employers indicated that services for students were provided by a community college – up one percent from 2005.

No change was seen in the percent of employers attributing characteristics to a community college in two areas from 2005 to 2009. Forty-three percent of the employers attributed online classes to a community college in both 2005 and 2009, and only 13 percent attributed academics to a community college in both years.

Examining the attributes that have slipped from 2005 to 2009, or those that the employers were less likely to attribute to a community college and more likely to attribute to a university, one finds that the high-quality attributes are the ones that have lost ground – they are more likely to attribute them to the four-year colleges and universities. Fewer employers attribute preparing students for the future in 2009 (26 percent) than they did in 2005 (28 percent) to a community college. Two of the largest drops have been in a community college as a source of employees and up-to-date curriculum. In 2005, 37 percent of the employers noted a community college was a source of employees and that has dropped to only 23 percent in 2009. While 30 percent of the employers in 2005 attributed up-to-date curriculum to a community college in 2005, that too has dropped to only 17 percent of the employers attributing that characteristic to a community college. The percentage of employers in 2005 who attributed quality of education to a community college (14 percent) has dropped as well – only 12 percent of the employers attributed it to a community college in 2009. Fewer employers also attributed technical training for jobs to a community college in 2009 (11 percent) than in 2005 (17 percent). State-of-the-art technology was rated as an attribute of a community college by 12 percent in 2005 but has dropped to only nine percent of the employers in 2009. High-quality instruction also saw a major drop from 2005 to 2009 – from 16 percent of employers to seven percent of the employers noting it was an attribute of a community college.

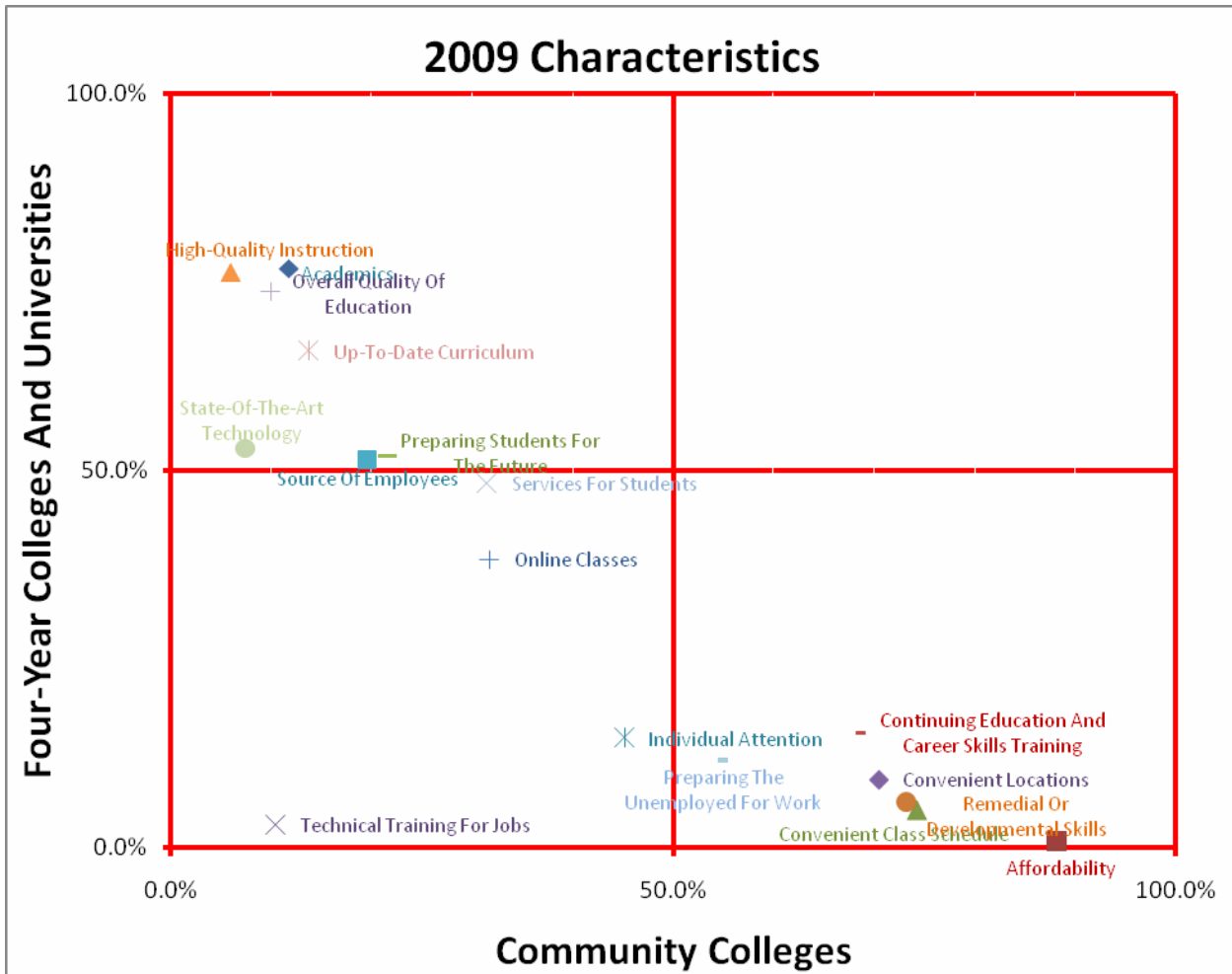
Two new areas were added in the 2009 survey regarding the web site. Fourteen percent of the employers attributed web site appeal and availability of key information on the web site to a community college – employers were most likely to attribute this characteristic to a four-year college.

Chart 9-A. Image Analysis Of Community Colleges Versus Four-Year Colleges And Universities By Employers In Service Area, 2005



2005 Quadrants. To understand the positioning of the Community College of Philadelphia in relation to the four-year colleges and universities in the service area, the percentage of employers which attributed a characteristic to each type of educational institution is plotted for the community colleges and the four-year colleges and universities for both 2005 and 2009 in Charts 9-A and 9-B. As seen in Chart 9-A above, the characteristics which are found in the upper left quadrant define the image of the four-year colleges and universities. Specifically, the employers in the market define the market position of the four-year colleges and universities as overall quality of education, academics, high-quality of instruction, state-of-the-art technology, up-to-date curriculum, preparing students for the future, services for students, and online classes. The lower right quadrant is the quadrant which defines the market position of the community colleges in the market. The characteristics making up the market position for the community colleges include affordability, remedial or developmental skills, convenient class schedules, preparing the unemployed for work, convenient locations, and career skills for the employed.

Chart 9-B. Image Analysis Of Community Colleges Versus Four-Year Colleges And Universities By Employers In Service Area, 2009



2009 Quadrants. Using the same formatting for the 2009 data as was seen for the 2005 data, Chart 9-B presents the plotted results of the percentage of employers who attributed a characteristic to each type of educational institution for the community colleges and the four-year colleges and universities for 2009. The employers in the market in 2009 also define the market position of the four-year colleges and universities as academics, overall quality of education, and high-quality of instruction. State-of-the-art technology has dropped to the bottom of the four-year quadrant since 2005, as has preparing students for the future. Services for students, attributed to the four-year colleges in 2005, has dropped from the four-year college quadrant, as have online classes, but the characteristic of source of employees has moved up to the four-year quadrant. The lower right quadrant is the quadrant which defines the market position of the community colleges in the market. The characteristics making up the market position for the community colleges include affordability, convenient class schedules, remedial or developmental skills, preparing the unemployed for work, convenient locations, and career skills for the employed.

Business Characteristics

The 400 employers represented in the 2005 survey accounted for 177,961 employees in Philadelphia and 747,443 employees worldwide (see Chart 10). By 2009, the 400 employers in Philadelphia surveyed accounted for 430,715 employees in Philadelphia and 9,760,331 employees worldwide.

Chart 10. Current And Predicted Employment Characteristics By Comparison Of 2005 And 2009 Results

	2005	2009
Current Number of Employees		
Philadelphia	177,961	430,715
Worldwide	7,477,443	9,760,331
Percent Forecasting Increase In Employees	26.1	9.3
Increase In Employees (Number)	19,317	3,381
Percent Forecasting Decrease In Employees	2.6	4.9
Decrease In Employees (Number)	-740	-513

Of the 400 employers in the survey, the predictions for future employment were at least positive, as seen in Chart 10. In 2005, 26 percent of the employers were anticipating an increase in employment with 19,317 employees anticipated to be added, and only three percent were anticipating a reduction of 740 employees. By 2009, only nine percent of the employers in Philadelphia were anticipating increasing employment in the next year and that would add an additional 3,381 employees. Five percent of the employers in 2009 were anticipating a decrease in employment, a reduction of 513 employees.

Chart 11. Summary Of Business Characteristics By Comparison Of 2005 And 2009 Results

	2005	2009
Group SIC Code		
Agriculture, Forestry, And Mining	1.5	0.3
Contractors And Construction	4.0	3.8
Manufacturing	14.5	8.5
Transportation, Communications, And Facilities	5.0	4.5
Wholesale Trade	4.5	2.5
Retail Trade	17.5	16.5
Finance, Insurance, And Real Estate	4.0	4.8
Business And Personal Services	12.5	9.8
Health Services	17.0	13.5
Legal Services	3.0	5.5
Education And Social Services	7.8	21.3
Art And Membership Organizations	1.0	1.8
Engineering, Architecture, And Accounting	3.0	2.5
Household & Miscellaneous Services	0.3	0.0
Government (Public Administration)	3.8	4.8
Average Number Years In Operation	50.8	57.0
Interested In Having <i>Corporate Solutions</i> Representative Contact	N/A	32.8

Business Classifications. Each employer's SIC (standard industrial classification) Code was noted on the survey to ensure that a representative sample was actually obtained. As found in Chart 11, shifts have occurred in the composition of the sample frame from 2005 to 2009 by employer type. In 2005, the major employer classifications included retail trade (18 percent), health services (17 percent), manufacturing (14 percent), and business and personal services (12 percent). In the 2009 sample, 21 percent of the employers were in education and social services, 16 percent in retail trade, and 14 percent

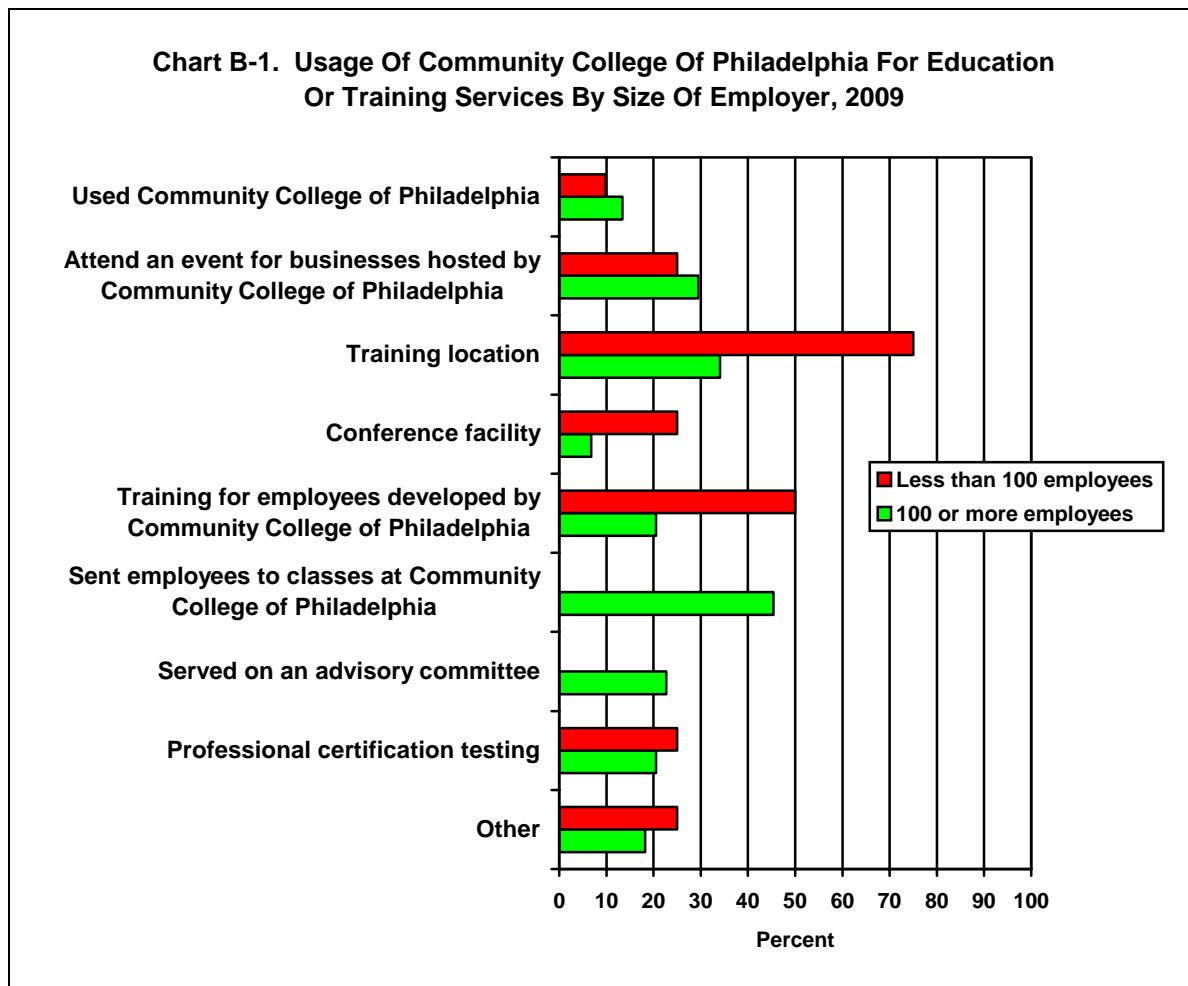
in health services. Two explanations exist for the shift in business classifications – the number of businesses by type have changed in the last five years, and the 2009 sample excludes the zip codes outside of the city of Philadelphia in the MSA that were included in the 2005 sample.

The average length of operation for the employers in 2005 was 51 years and by 2009 it was 57 years. One-third of the employers surveyed would be interested in having a *Corporate Solutions* representative contact them.

Appendices

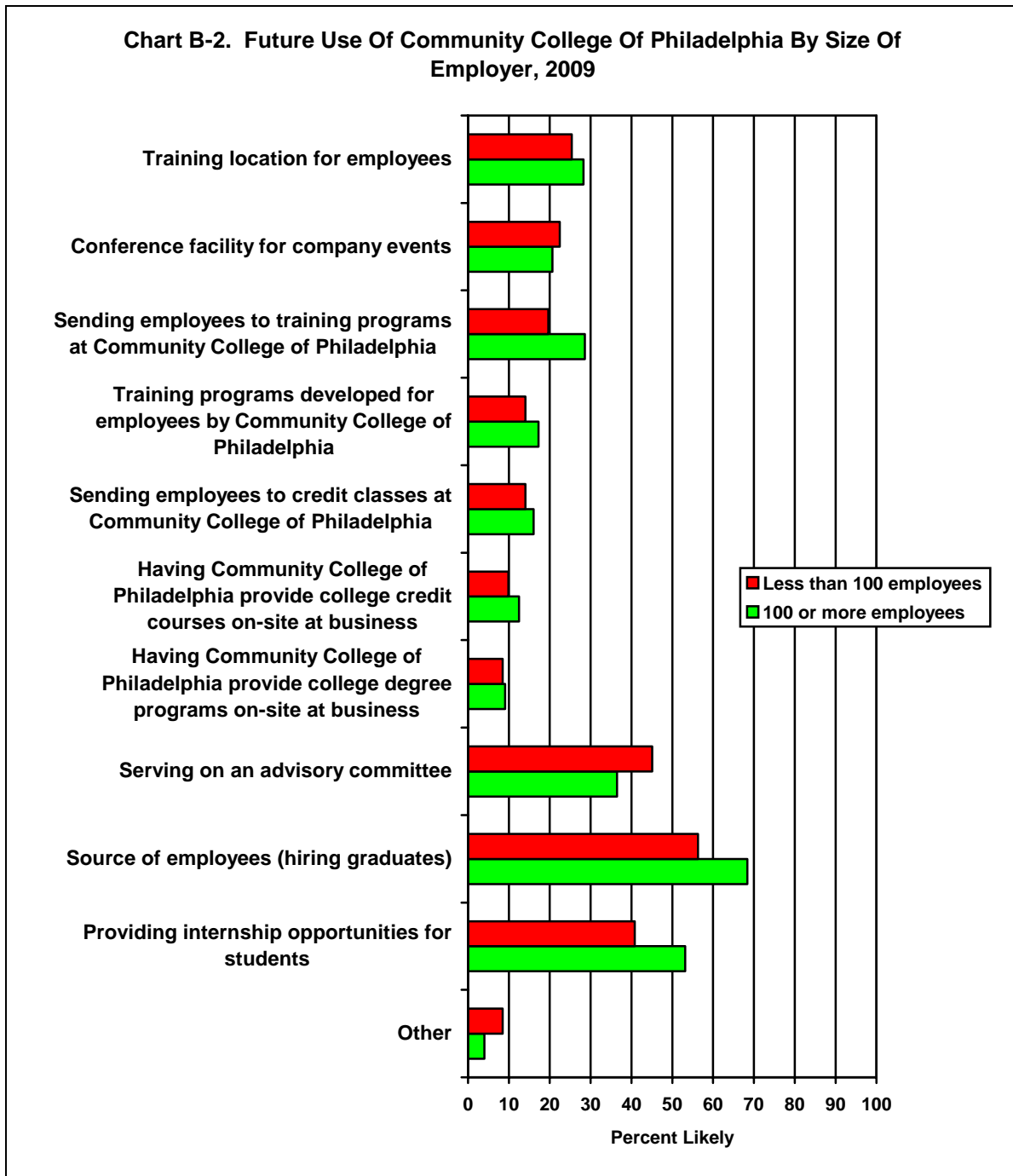
Appendix A. Questionnaire

Appendix B. Graphic And Tabular Results By Size Of Employer, 2009



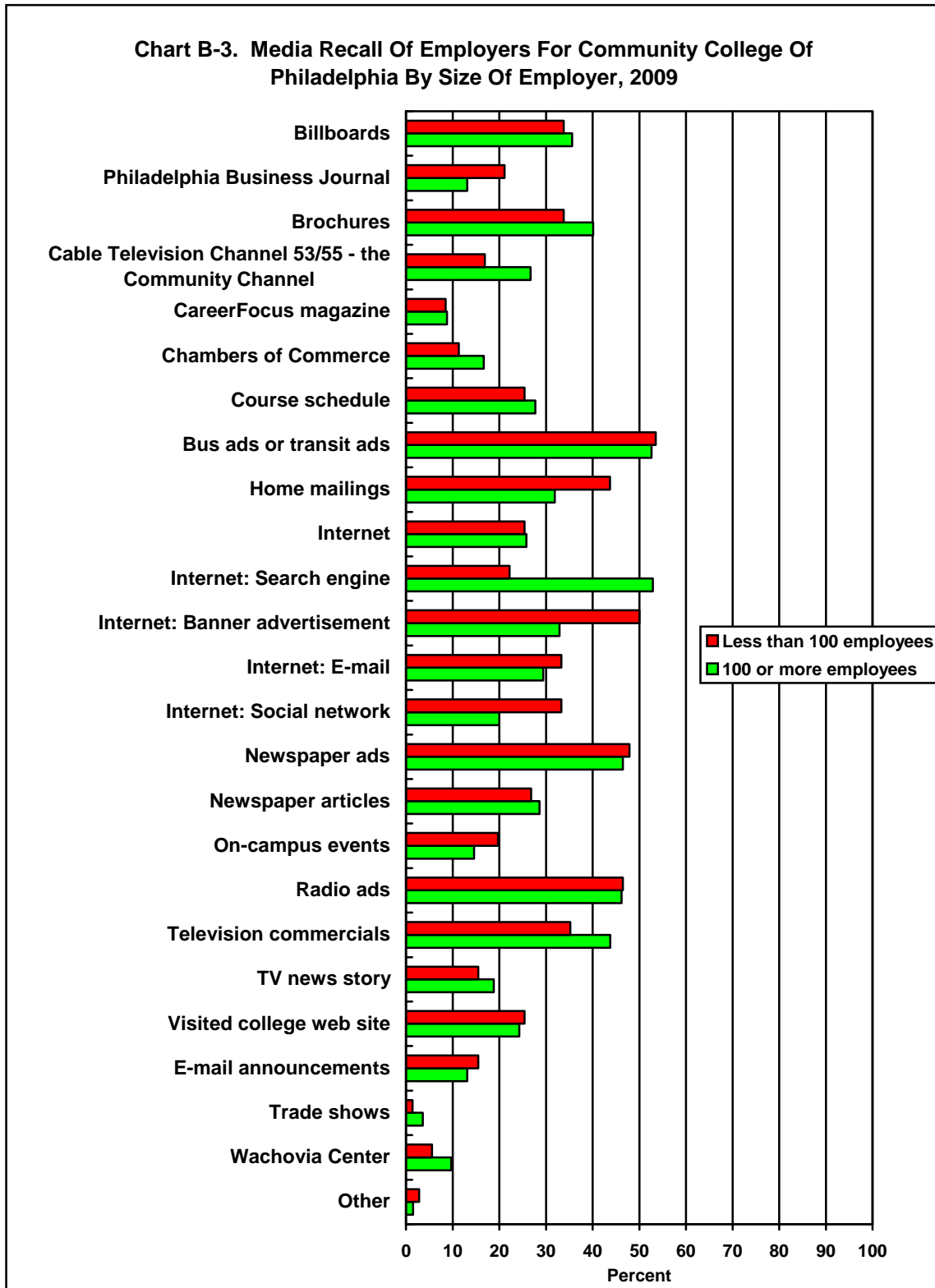
- The larger employers, those with 100 or more employees, are more likely to have used Community College of Philadelphia as an educational or training resource than those employers with less than 100 employees. Thirteen percent of the employers with 100 or more employees have used Community College of Philadelphia, compared to only 10 percent of the employers with less than 100 employees.
- The major areas for which the larger employers have used the College include sending employees to classes at Community College of Philadelphia (45 percent), using it as a training location (34 percent), and attending an event for businesses hosted by Community College of Philadelphia (30 percent). Other ways the larger employers have used the College include serving on an advisory committee (23 percent), training for employees developed by Community College of Philadelphia (20 percent), professional certification testing (20 percent), and used it as a conference facility (seven percent).
- The major ways the smaller employers (those with less than 100 employees) have used Community College of Philadelphia include as a training location (75 percent), training for employees developed by Community College of Philadelphia (50 percent), attended an event for businesses hosted by Community College of Philadelphia (25 percent) professional certification testing (25 percent), and used it as a conference facility (25 percent).

- The other uses of Community College of Philadelphia as noted by the employers in 2009 included: 10 classes a semester here, CNA, computer course, on-site/ Microsoft applications, placement testing, students go there, web eye, went to employee fair, and web net program.



- The major areas in which more than half of the employers with 100 or more employees are likely to use Community College of Philadelphia in the future are as a source of employees (68 percent) and for providing internship opportunities (53 percent). One-third (36 percent) of the larger employers would serve on an advisory committee for the College. Slightly more than one-fourth of the larger employers would use the College in the future as a training location for employees (28 percent) and sending employees to training programs at Community College of Philadelphia (28 percent). Twenty percent or less of the larger employers will use the College for a conference facility (21 percent), having the College develop training programs for their employees (17 percent), sending employees to credit classes at the College (16 percent), having the College provide credit courses to employees on-site (12 percent), and having the College provide degree programs for employees on-site (nine percent).

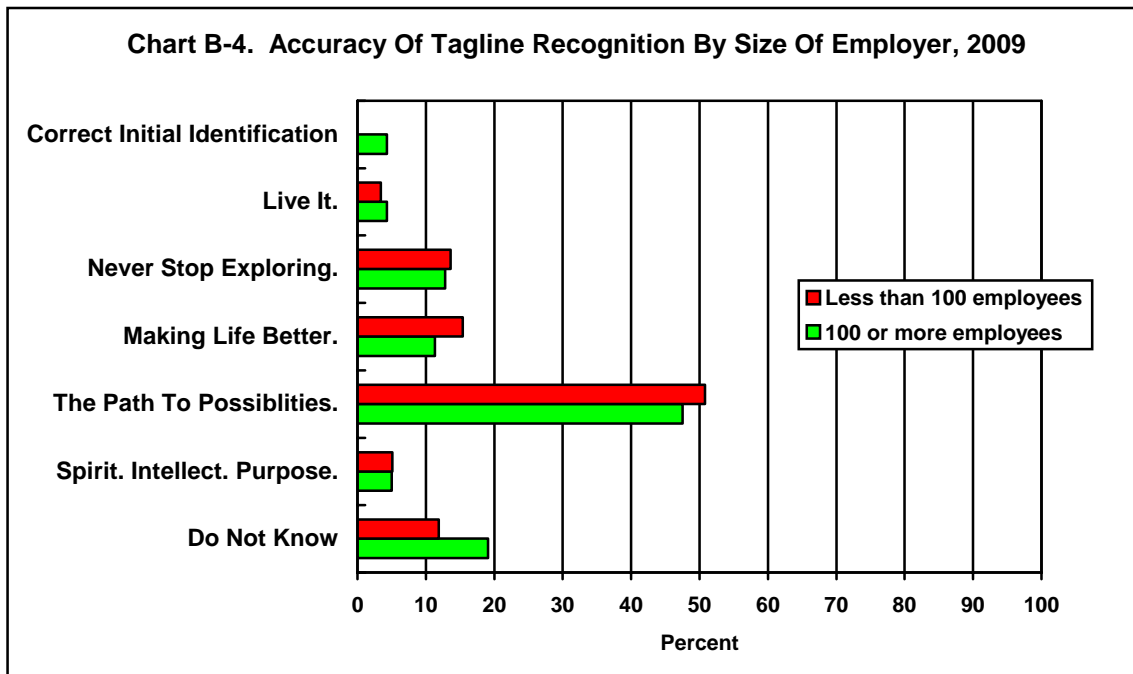
- The employers with less than 100 employees agree with the larger employers as to the key ways they will use Community College of Philadelphia in the future. Fifty-six percent of the employers with less than 100 employees plan to use the College as a source of employees, 45 percent will serve on an advisory committee, and 41 percent will provide internship opportunities for students. One-fourth of the employers with less than 100 employees plan to use the College as a training location for employees, and 22 percent will use it as a conference facility. Twenty percent or less of the smaller employers will use the College for sending employees to training programs at Community College of Philadelphia (20 percent), having the College develop training programs for their employees (14 percent), sending employees to credit classes at the College (14 percent), having the College provide credit courses to employees on-site (10 percent), and having the College provide degree programs for employees on-site (eight percent).
- The future uses of the Community College of Philadelphia as cited by the employers in 2009 included: executive training/ communications, financial aid workshop/ SAT workshops, further education, grants, if something offered, job requirement, mentorship programs/ artists, presentation or lecture on child psychology, recruiting freelance reporters, recruiting network/ that might be good to set up, recruiting/ sponsor an event, recruitment, safety tips, safety/ lead or green building certifications, waiting for on-site training to be worked out, we would use interns from a culinary school, workshops, would like to collaborate with Community College of Philadelphia, and job fairs.



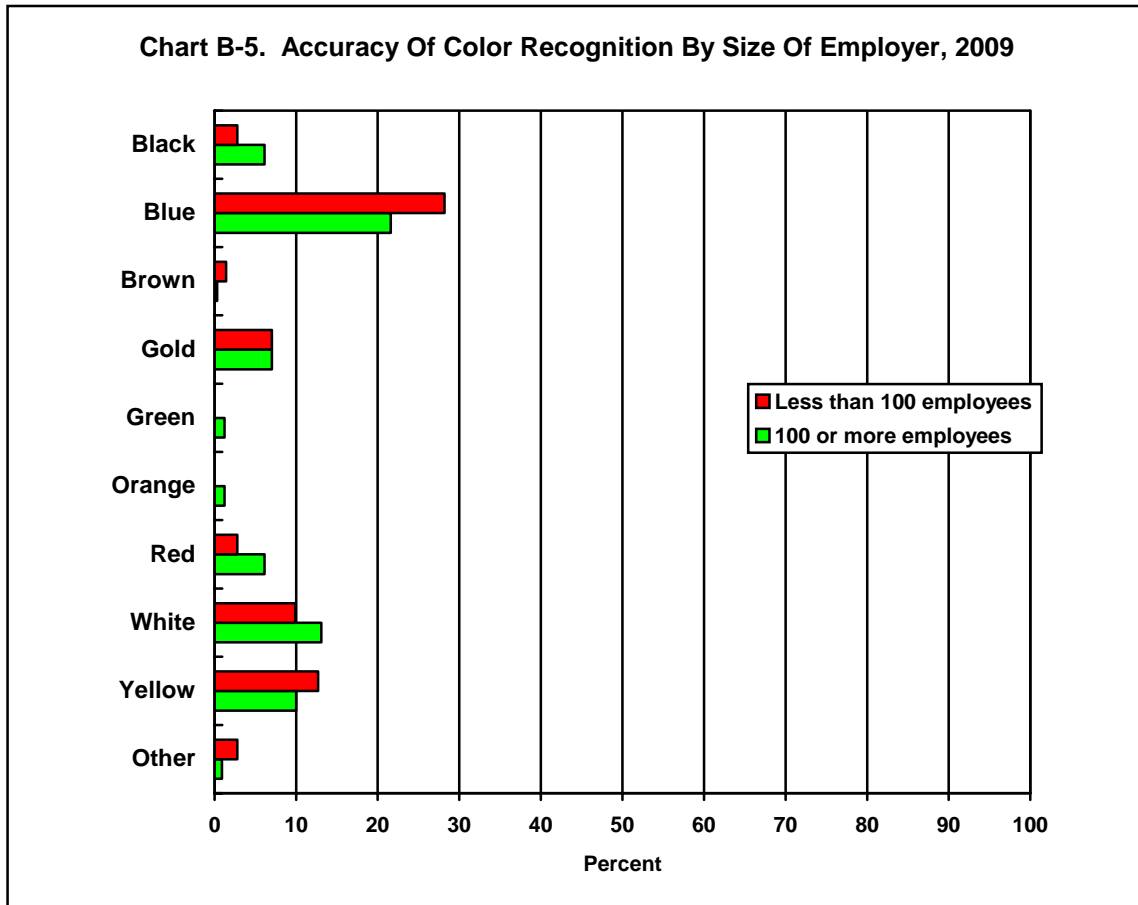
- There were few differences noted between the employers with less than 100 employees and the employers with 100 or more employees with respect to their media recall regarding the Community College of Philadelphia. The media in which more than half of the employers recalled information about Community College of Philadelphia in the last year were bus ads or transit ads

(53 percent). Slightly less than half of the larger employers recalled information about the College in newspaper ads (46 percent), radio ads (46 percent), and television commercials (44 percent). Slightly more than one-third of the larger employers gained information about the College through brochures (40 percent) and billboards (36 percent). Thirty two percent of the larger employers also gained information about the College from home mailings, 29 percent from newspaper articles, 28 percent from the course schedule, and 27 percent from Cable Television Channel 53/55, or the Community Channel. One-fourth of the larger employers gained information from the Internet about Community College of Philadelphia – 53 percent of those gained information from a search engine, 33 percent a banner advertisement, 29 percent from e-mail, and 20 percent from a social network. Twenty-four percent of the employers with 100 or more employees visited the College web site, 19 percent saw a TV news story, 17 percent gained information from a Chamber of Commerce, 15 percent from an on-campus event, 13 percent from e-mail announcements, and 13 percent read something in the Philadelphia Business Journal. Less than 10 percent of the larger employers saw something about the College at the Wachovia Center, read a CareerFocus magazine, or at a trade show.

- The employers with less than 100 employees (the smaller employees surveyed) also were most likely to have seen or heard something about Community College of Philadelphia in the last year through bus ads or transit ads (54 percent), newspaper ads (48 percent), radio ads (46 percent), home mailings (44 percent), and television commercials (35 percent). Other media that one-third of the smaller employers used to gain information about Community College of Philadelphia were brochures and billboards. Newspaper articles were a source of information about the College for 27 percent of the smaller employers and one-fourth gained information from the course schedule. One-fourth of the employers have visited the College web site, and one-fourth recalled information about the College from the Internet, specifically from banner advertisements (50 percent), e-mail (33 percent), social networking (33 percent), and search engines (22 percent). Other media sources which the smaller employers had seen or heard something about Community College of Philadelphia included: Philadelphia Business Journal (21 percent), on-campus events (20 percent), Cable Television Channel 53/55 - the Community Channel (17 percent), TV news story (16 percent), e-mail announcements (16 percent), Chambers of Commerce (11 percent), CareerFocus magazine (eight percent), the Wachovia Center (six percent), and trade shows (one percent).
- The other media sources mentioned by the employers in which they had seen or heard something about Community College of Philadelphia in the last year included career fair, church announcements, e-mail for recruitment purposes, probably have seen but do not pay attention, serve on a board that talked about it, social services board, and walk by it every day.

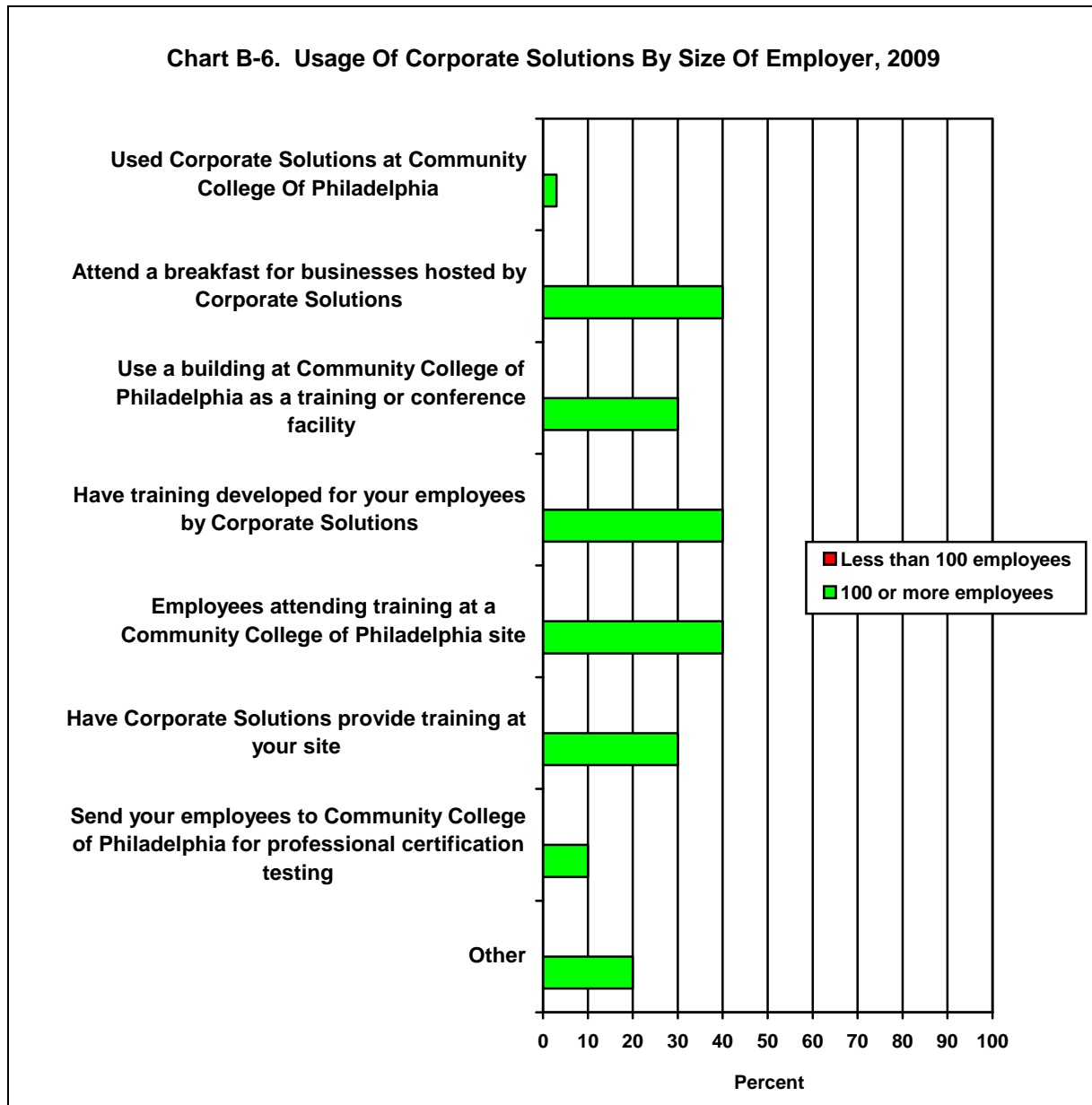


- The smaller employers were slightly more likely to correctly identify the tagline for Community College of Philadelphia in a test of aided recall but not in unaided recall. Four percent of the employers with 100 or more employees correctly said “The Path To Possibilities” when asked what the tagline was for the Community College of Philadelphia, but none of the smaller employers (those with less than 100 employees) could recall the tagline.
- In aided recall, the smaller employers were slightly more likely to correctly identify the tagline for Community College of Philadelphia. For those who could not state the tagline, a series of five taglines from colleges in the City were read. Forty-eight percent of the larger employers correctly identified “The Path To Possibilities” as the tagline for Community College of Philadelphia, as did 51 percent of the smaller employers.

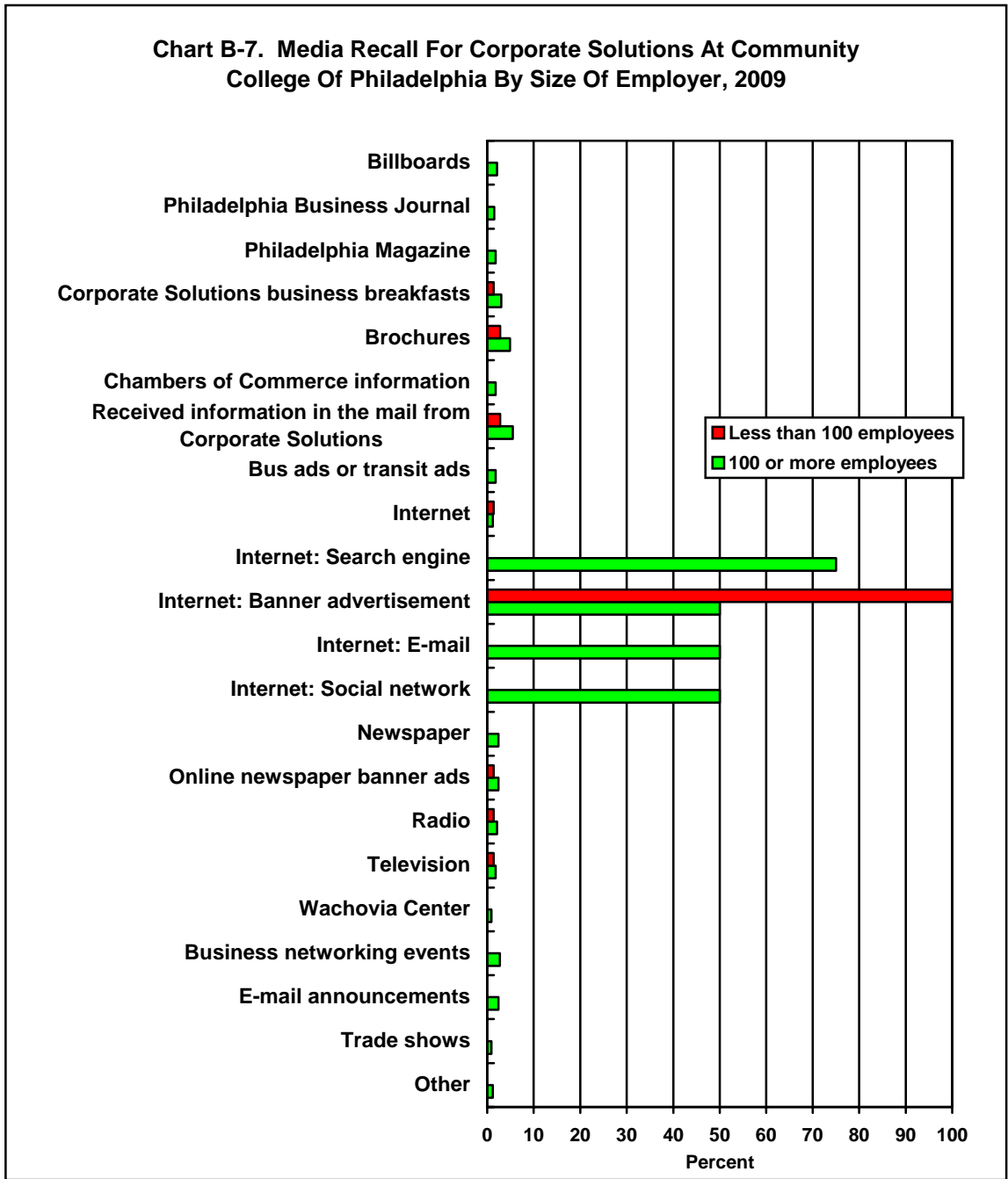


- Since the inception of the new branding and advertising campaign for Community College of Philadelphia in 2006, the College has used black and yellow as the primary colors for the marketing materials for Community College of Philadelphia. Thirteen percent of the smaller employers and 10 percent of the larger employers identified yellow as a primary color for Community College of Philadelphia. Blue was the most recognized color for Community College of Philadelphia with 28 percent of the employers with less than 100 employees and 22 percent of the employers with 100 or more employees recalling blue as a primary color for Community College of Philadelphia. Ten percent of the smaller employers and 13 percent of the larger employers noted white was a primary color. Three percent of the smaller employers and six percent of the larger employers identified black as a primary color for the College.

Chart B-6. Usage Of Corporate Solutions By Size Of Employer, 2009



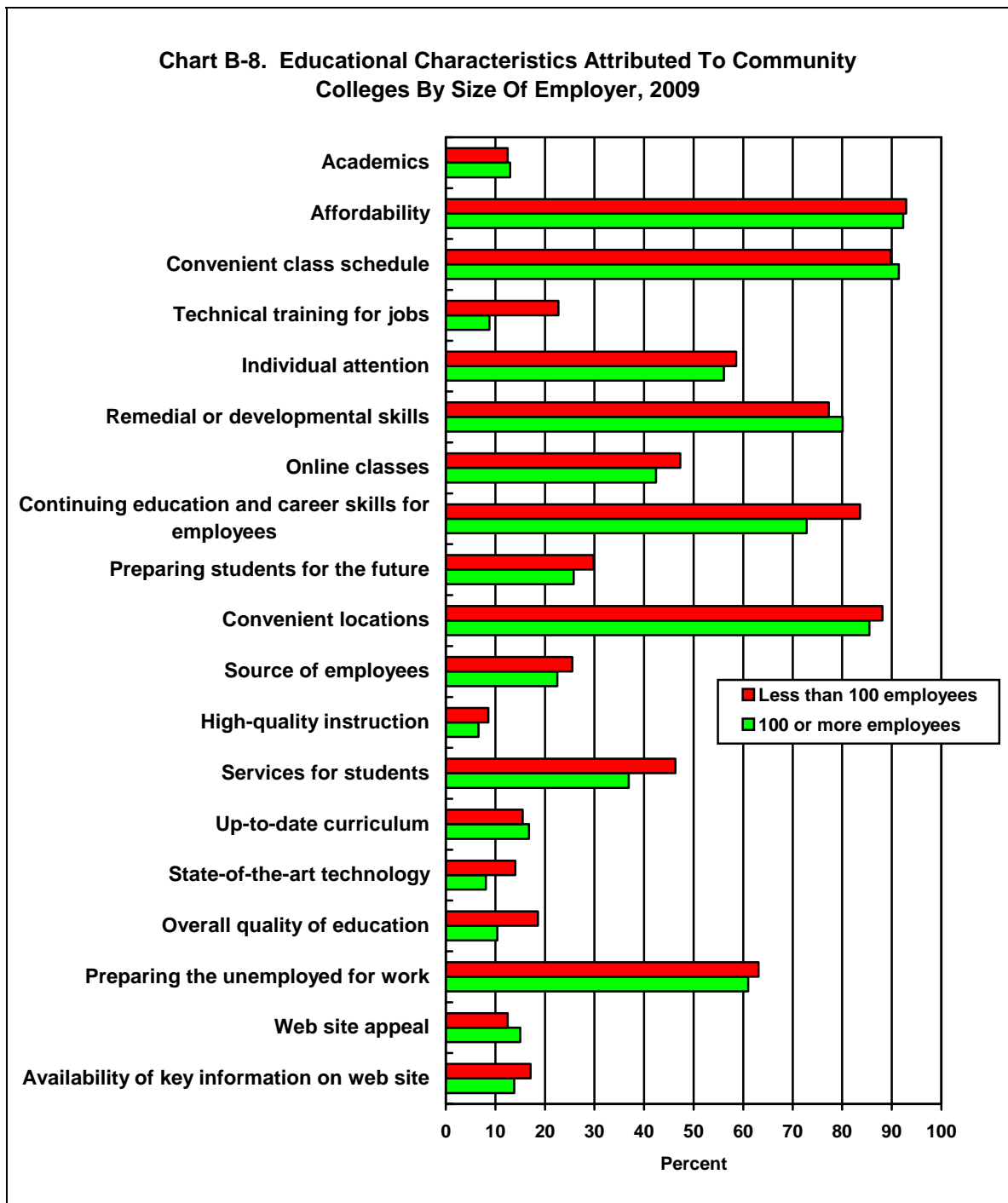
- A major goal of the marketing campaign for Community College of Philadelphia was to increase the visibility of *Corporate Solutions*. Only three percent of the larger employers and none of the smaller employers in the City of Philadelphia have used *Corporate Solutions*. Forty percent of the larger employers (those with 100 or more employees) who have used *Corporate Solutions* have attended a breakfast for businesses hosted by *Corporate Solutions*, employees attended training at a Community College of Philadelphia site, and they have had training developed for their employees by *Corporate Solutions*. Thirty percent of the employers who have used *Corporate Solutions* have used a building at Community College of Philadelphia as a training or conference facility or have had *Corporate Solutions* provide training at their site. Ten percent of the larger employers have sent their employees to Community College of Philadelphia for professional certification testing. Twenty percent of the employers who have used *Corporate Solutions* noted other uses, specifically program for RN partnership and tutoring services.



- Employers were asked what media they specifically recalled hearing or seeing anything about Community College of Philadelphia’s *Corporate Solutions* in the last year. For the larger employers, those with 100 or more employees, the most successful communications with businesses were received information in the mail from *Corporate Solutions* (six percent), brochures (five percent), *Corporate Solutions* business breakfasts (three percent) and business networking events (three percent). The major issue is that while the media recall for Community College of Philadelphia overall has increased with the employers, media recall for *Corporate Solutions* is still low. Only two percent of the larger employers recalled seeing or hearing anything about *Corporate Solutions* via e-mail announcements, online newspaper banner ads, newspaper, radio, television, bus or transit ads, Chambers of Commerce information, Philadelphia Magazine, and Philadelphia Business Journal. Only one percent recalled any information from trade shows,

Wachovia Center, and the Internet, but the three-fourths who saw something about *Corporate Solutions* on the Internet saw it in a search engine, and half gained information from a banner advertisement, e-mail, or a social network.

- Smaller employers, those with less than 100 employees, were less likely to recall seeing or hearing anything about *Corporate Solutions* in the media last year, and those who did recalled fewer sources of information. Three percent of the smaller employers received information in the mail from *Corporate Solutions* and saw brochures. Only one percent of the smaller employers recalled getting information about *Corporate Solutions* from *Corporate Solutions* business breakfasts, online newspaper banner ads, radio, television, and the Internet (predominantly banner advertisements).
- One percent of the employers mentioned other sources of media in which they had gained information about *Corporate Solutions* in the last year and those sources included: an employee gave information, communicate with (person's name) at college, home mailing, and word of mouth.



- The employers with less than 100 employees are more likely to attribute technical training for jobs, continuing education and career skills for employees, services for students, and overall quality of education to the community colleges than the employers with 100 or more employees.
- More than half of the larger employers are likely to attribute the following characteristics to community colleges: affordability (92 percent), convenient class schedule (91 percent), convenient locations (86 percent), remedial or developmental skills (80 percent), continuing education and career skills for employees (73 percent), preparing the unemployed for work (61 percent), and individual attention (56 percent). The college characteristics that were least likely to be attributed to community colleges by the large employers (less than half) included: online

classes (42 percent), services for students (37 percent), preparing students for the future (26 percent), source of employees (22 percent), up-to-date curriculum (17 percent), web site appeal (15 percent), availability of key information on web site (14 percent), academics (13 percent), overall quality of education (10 percent), technical training for jobs (nine percent), state-of-the-art technology (eight percent), and high-quality instruction (seven percent).

- The college characteristics that the employers with less than 100 employees were likely to attribute to the community colleges mirrored those of the larger colleges. The college characteristics that the smaller employers attributed to community colleges include affordability (93 percent), convenient class schedule (90 percent), convenient locations (88 percent), continuing education and career skills for employees (84 percent), remedial or developmental skills (77 percent), preparing the unemployed for work (63 percent), and individual attention (59 percent). Those college characteristics that less than half of the smaller employers attributed to community colleges included: online classes (47 percent), services for students (46 percent), preparing students for the future (30 percent), source of employees (26 percent), technical training for jobs (23 percent), overall quality of education (19 percent), availability of key information on web site (17 percent), up-to-date curriculum (16 percent), state-of-the-art technology (14 percent), web site appeal (12 percent), academics (12 percent), and high-quality instruction (nine percent).

Chart B-9. Current And Predicted Employment Characteristics By Size Of Employer, 2009

	Less Than 100 Employees	100 Or More Employees
Current Number of Employees		
Philadelphia	4,158	426,557
Worldwide	32,275	9,728,056
Percent Forecasting Increase In Employees	12.7	9.1
Increase In Employees (Number)	94	3,287
Percent Forecasting Decrease In Employees	4.2	4.5
Decrease In Employees (Number)	-71	-442

- The employers with less than 100 employees accounted for 4,158 employees in Philadelphia and 32,275 employees worldwide. The employers with 100 or more employees had 426,557 employees in Philadelphia and 9,728,056 employees worldwide.

Chart B-10. Summary Of Business Characteristics By Size Of Employer, 2009

	Less Than 100 Employees	100 Or More Employees
Group SIC Code		
Agriculture, Forestry, And Mining	0.0	0.3
Contractors And Construction	1.4	4.3
Manufacturing	7.0	8.8
Transportation, Communications, And Facilities	8.5	3.6
Wholesale Trade	2.8	2.4
Retail Trade	16.9	16.4
Finance, Insurance, And Real Estate	4.2	4.9
Business And Personal Services	9.9	9.7
Health Services	5.6	15.2
Legal Services	1.4	6.4
Education And Social Services	35.2	18.2
Art And Membership Organizations	1.4	1.8
Engineering, Architecture, And Accounting	2.8	2.4
Government (Public Administration)	2.8	5.2
Average Number Years In Operation	45.0	59.5
Interested In Having Corporate Solutions Representative Contact	29.6	33.4

- The larger and smaller employers were very similar with respect to representation by SIC code with a few exceptions. Larger employers (those with 100 or more employees) were more likely to have a higher percentage representation among contractors and construction, health services, legal services, and government. Smaller employers (those with less than 100 employees) were more likely to have a higher representation in transportation, communications and facilities, and education and social services.
- The average years in operation for the employers with less than 100 employees was 45 years and for the larger employers it was 60 years. Thirty percent of the smaller employers and 33 percent of the larger employers are interested in having a *Corporate Solutions* representative contact them about services.

Appendix C. Comparison Of 2005 And 2009 Tabular Results

Appendix D. Detailed Verbatim Responses