




#Altraining

STRATEGICALLY MANAGING ALUMNI CHAPTERS


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LEARNING OUTCOME

After participating...

...you will be able to prioritize resources more effectively across all alumni chapters.



AGENDA

- University of South Florida: Before & After
- Tiered Model
- Engaging and Mission-Based Programming
- Managing Volunteers from Afar
- Moving Forward & Evaluating Success



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University of South Florida
BEFORE & AFTER



THE EARLY YEARS

- Chapters focused in Tampa Bay
- Societies few and far between
- Inconsistent staff liaisons
- High volunteer turnover
- Program was STALE

THE BOOM



- Alumni Association looks to expand groups program
- USF Athletics success skyrockets
- Everyone wants on the alumni bandwagon
- Program was BOOMING

THE FALLOUT

- Too much rapid and non-strategic growth
- You can't be all things to all groups
- What is the ROI?
- The program was now UNMANAGEABLE



MOVING TOWARDS CHANGE

- Where did we want to go?
 - Research
 - Assess
 - Create
- Key recommendations
 - Clear priorities/expectations
 - Training
 - Resources
 - Financial support



WHY PROJECT GROUP EVOLUTION?



Our groups are living breathing entities. As their role within the university community changes they will continue to evolve.



POLL

**How likely are you to make a
change to the structure of your
alumni chapter program in the
next 12 months?**



RESOURCE

Trends and Best Practices in Alumni Relations



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TIERED MODEL



DEFINING GROUPS

CHAPTERS & SOCIETIES

- Serve 1000 or more alumni

NETWORKS

- Serve less than 1000 alumni



CHAT

**How do you classify your
alumni groups?**

GROUP EXPECTATIONS

CHAPTERS AND SOCIETIES

- Maintain leadership team of at least four members
- Comply with all policies and procedures
- Communicate regularly with constituents and staff liaison
- Participate in annual community service day event
- Host four additional unique events per year
- Raise a minimum of \$500 per year for a group scholarship
- Submit reports as required



GROUP EXPECTATIONS

NETWORKS

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RESOURCE

GROUP EXPECTATIONS

STAFF EXPECTATIONS

STAFF WILL...

- Provide training and materials
- Regularly communicate with leaders
- Attend at least one group activity per semester
- Assist with event planning
- Reserve and staff space in the Alumni Center
- Review all document submissions

STAFF EXPECTATIONS

STAFF WILL...

- Provide décor and giveaway items
- Provide access to online email tool
- Oversee all event commerce
- Provide fundraising planning resources
- Inform groups of university news and faculty/staff/admin travel to their area



PROVIDING FINANCIAL SUPPORT

GRANT PROGRAM

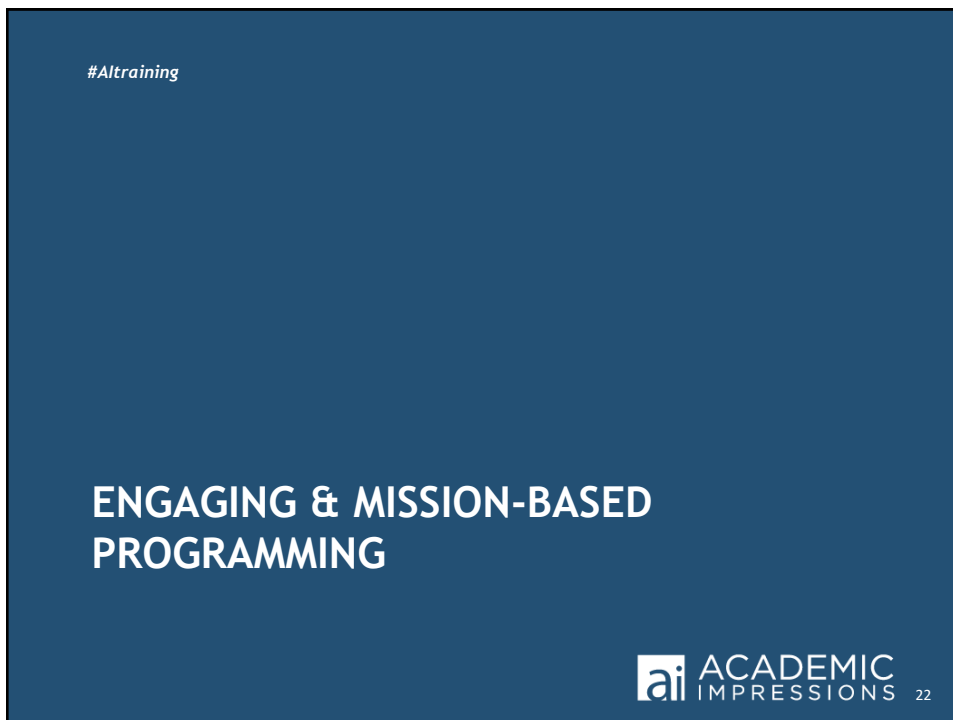
- Online request
- Awards on a rolling basis
- Maximum \$1500 per group/fiscal year

ONLINE GIVING SITE

- Direct access to group scholarship funds
- Piloted with seven groups

Also encouraged to fundraise through sponsorships, event fees, auctions, games of chance (raffles)





EVENTS

- Work closely with groups to encourage a diversity of events
- Require a minimum of one event that supports students and participation in our annual day of service

EVENTS

SOCIAL

- Athletic watch parties
- Happy hours
- Brunches
- City tours
- Professional athletic events
- Tailgates

PROF/PERSONAL DEVELOPMENT

- Symposia
- Lectures
- Networking sessions

STUDENT SUPPORT

- Fundraisers
- Resume writing session
- Alumni career panel
- 7 at 7 dinners
- Hometown round-ups

SERVICE

- Paint Your Heart Out
- Humane Society Pet Adoption
- Walk-A-thon
- Beach or waterway clean up

EVENTS WITH OTHER SCHOOLS ALUMNI GROUPS

- We encourage co-sponsoring/partnering on events between USF alumni groups and other university alumni groups.
- In areas that are far from Florida, partnering with alumni groups from other institutions has been particularly successful.



EVENTS WITH OTHER SCHOOLS ALUMNI GROUPS

Events with Groups from Other Universities

- Field Day
- Pub Crawl
- Happy Hour
- Game Watch

Successful in:

- Los Angeles
- Austin, TX
- Atlanta, GA



COLLABORATIVE TRAVEL

We work with other university departments and colleges to find out when someone from their area is traveling to a region where we have an active alumni chapter and connect the two.



COLLABORATIVE TRAVEL

Collaborative Travel Opportunities

- President travel
- Provost travel
- Dean travel
- Faculty travel
- Conference travel



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MANAGING VOLUNTEERS FROM AFAR



ALUMNI GROUPS LANDING PAGE



Alumni Groups

About Groups

Learn the basics about alumni groups and find an alumni group.

Volunteer Leader Resources

A variety of leadership and group management resources are available to group leaders, including templates and forms for all alumni groups.

Starting an Alumni Group

If there isn't a group in your area or representing your interest, learn how to start one.

Group Scholarship Giving

You can support a student from your community or with a common academic interest with a gift to your chapter's or society's scholarship fund.

Group News and Highlights

Useful news and updates for current leaders and group spotlights.

Group Events

Alumni groups host a variety of programs and events. [Click here to learn group events.](#)

Stay Connected

Update your contact info in your official USF record, opt into action alerts via text message and more.

<http://www.usfalumni.org/s/861/02-alumni/index.aspx?sid=861&gid=1&pgid=2985>





POLL

How happy are you with your
current alumni group
website/webpages?

VOLUNTEER LEADER RESOURCES



Volunteer Leader Resources

[Facebook](#) [Twitter](#) [LinkedIn](#) [YouTube](#) [Instagram](#)

This section includes resources for new and established groups in group management, financial management, marketing, communications, event planning, templates and a forms section where required reports and updates can be made and submitted online.



EVENTS PLANNING PAGE



Event Planning

[Twitter](#) [Facebook](#) [LinkedIn](#) [YouTube](#) [Instagram](#)

Well-planned events are vital for group success. In this section you will find resources to assist your group at every stage of the event planning process. There is general event planning information as well as information specific to certain events/group expectations.

Event Ideas

Event Planning Timeline

Insurance, Liability and Alcohol Policy

Watch Party Planning and Resources

Giveaway/Promotional Items

Online Event Registration Policy

Incoming Freshmen Round Up Planning

Service Event Resources

Templates - (sign-in sheet, name tags...)

Event Registration Form

Post Event Evaluation Form

- The page features everything a leader needs to plan and execute a successful event
- Some items are related to specific events while others are generic



FORMS PAGE



Forms

[Twitter](#) [Facebook](#) [LinkedIn](#) [YouTube](#) [Instagram](#)

<http://www.usfalumni.org/groupleaderawardin> in this section group leaders will find links to all required forms. Click on each link to learn more about the submission requirements. Please contact your group's alumni liaison with specific questions.

[Annual Report \(pdf\)](#)

[Confidentiality Form \(pdf\)](#)

[Event Registration Form](#)

[Grant Application](#)

[In-Kind Form \(pdf\)](#)

[Nonprofit Certificate of Tax Exemption \(pdf\)](#)

[Officer Contact Information Update](#)

[Post Event Evaluation Form](#)

[Annual Group Recognition Awards:](#)

[Chapter and Society Award Application](#)

[Network Award Application](#)

[Group Leader of the Year Award](#)

[Watch Party Registration 2015](#)

- This page includes several online forms that can be submitted online or printed



MARKETING & COMMUNICATIONS

USF ALUMNI ASSOCIATION

MEMBERSHIP CONNECT BULL PRIDE

STAY IN TOUCH YOUR ALUMNI ASSOCIATION

Home > Connect > Volunteer Leader Resources > Marketing and Communication

Marketing and Communication

Facebook Twitter LinkedIn YouTube


Marketing and communication are some of the most important elements, if not the most important elements, in creating and maintaining an active and successful alumni group. There's no question that alumni who are well-informed are more likely to participate and become engaged.

These resources will help you craft your message, reach alumni and promote your group:

- Marketing & Communications Overview
- The Brand Logo Usage and Brand Promise and Key Messages
 - Visual Standards: The USFAA takes guidance from the USF Design Language Deck for graphic design standards.
- Data Confidentiality
- Getting the Word Out
 - Tips for Social Media Success
 - Public Relations and Media
 - Email Communications:
 - Email Tool Video/Instructions
 - Email Communications Best Practices
 - Website Training Materials:
 - How to edit web page content (pdf)
 - How to post a news item (video)
 - How to post an event to the Alumni website calendar (pdf)
 - How to use an Image Rotator (pdf)
 - Netstag Order Information
 - Business Card Order Form

PROJECT GROUP EVOLUTION

The future of alumni groups looks now



- Largest resource page
- Items on this page are designed to help leaders craft their message, reach alumni and promote their group

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GROUP MANAGEMENT PAGE

USF ALUMNI ASSOCIATION

MEMBERSHIP CONNECT BULL PRIDE

Home > Connect > Volunteer Leader Resources > Group Management

Group Management

Twitter Google+ LinkedIn Share Facebook Like Share

Efficient groups are effective groups. Resources in this section will help group leaders set goals, organize their strategic direction and positively manage volunteers ensuring for long-term success.

Goal Setting

Election Process

Working with Volunteers

Alumni Leadership & Position Descriptions

Leadership Transition

- Efficient groups are effective groups
- Resources help group leaders set goals, strategize & positively manage volunteers

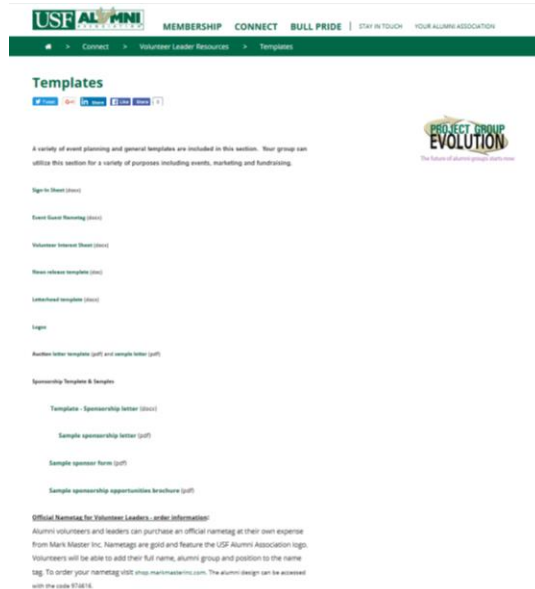
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Academic Impressions

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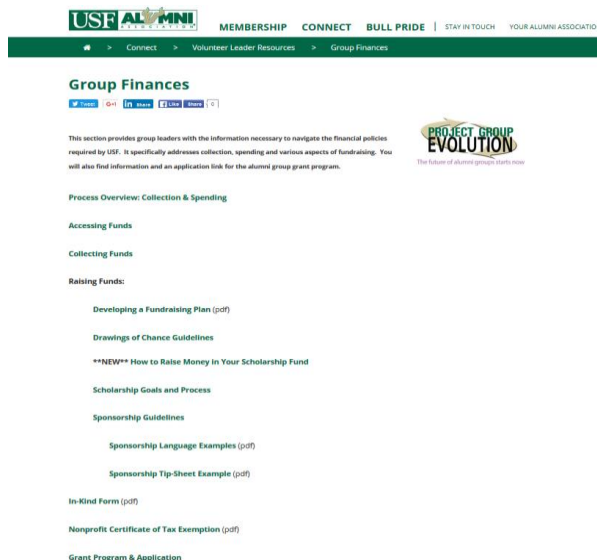
TEMPLATES PAGE



- A variety of event planning and general templates

- Utilized for a variety of purposes including events, marketing and fundraising

GROUP FINANCE PAGE



- All the information necessary to navigate the financial policies required by USF

- Specifically addresses collection, spending and various aspects of fundraising

UNIVERSITY RESOURCES PAGE

University Resources

[Tweet](#) [G+1](#) [in](#) [Share](#) [f](#) [Like](#) [Share](#) [0](#)

[USF System Facts/Figures/Stats](#)

[USF Traditions](#)

[Note-a-BULL Alumni](#)

[Merchandise and Logo'd Gear](#)

[USF Songs](#) - Alma Mater, Fight Song, March Victorious, The Bull #8 (3rd down charge song)

[USF Center for Leadership and Civic Engagement](#)

[USF Stampede of Service](#)

- Links to pages about the University, spirit sites and other related information



CHAT

What is your biggest challenge when it comes to volunteer management?

MANAGING LEADERS - EDUCATION

Managing expectations upfront will lead to a more positive experience and less volunteer management issues down the road

- This change is a clearer framework for activities, support & vision
- By streamlining our goals with the University we are empowering groups
- With these changes we are better able to send a clear & unified message
- Many schools use a tier structure and the model is not unique
- The transition will take place over several years
- The roll out plan for the transition is critical to overall success



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MANAGING LEADERS - BEST PRACTICES

CONTACT

- Face to Face
- Virtual
- Peer to Peer

TRAINING AND MATERIALS

- Promulgate all association and university policies

GOAL DEVELOPMENT

RECOGNITION AND PROMOTION

- Thank leaders and share their successes with others

Group News

University Updates

50 YEARS 1965-2015

USFSP and USFSM Celebrate Milestone Anniversaries
USF Saint Petersburg is celebrating its 50th anniversary and USF Sarasota Manatee is celebrating its 40th anniversary. Both institutions have already kicked-off their celebration but the fun is far from over. Events are planned through the spring semester at both locations. Don't miss out on the fun! Check out the [USFSP 50th anniversary website](#) and the [USFSM 40th anniversary website](#) to learn more about the celebration and the history of these institutions.

Three USF Online Programs Rank in Top 25 Nationally
In new rankings released Tuesday by [U.S. News & World Report](#), three University of South Florida online graduate programs appear in the top 25 nationally, including two showing substantial improvement from last year. Two USF programs, graduate computer information technology and graduate engineering, rank the highest among public universities in Florida. Read the full story [here](#) at USF News.

Group Reminders

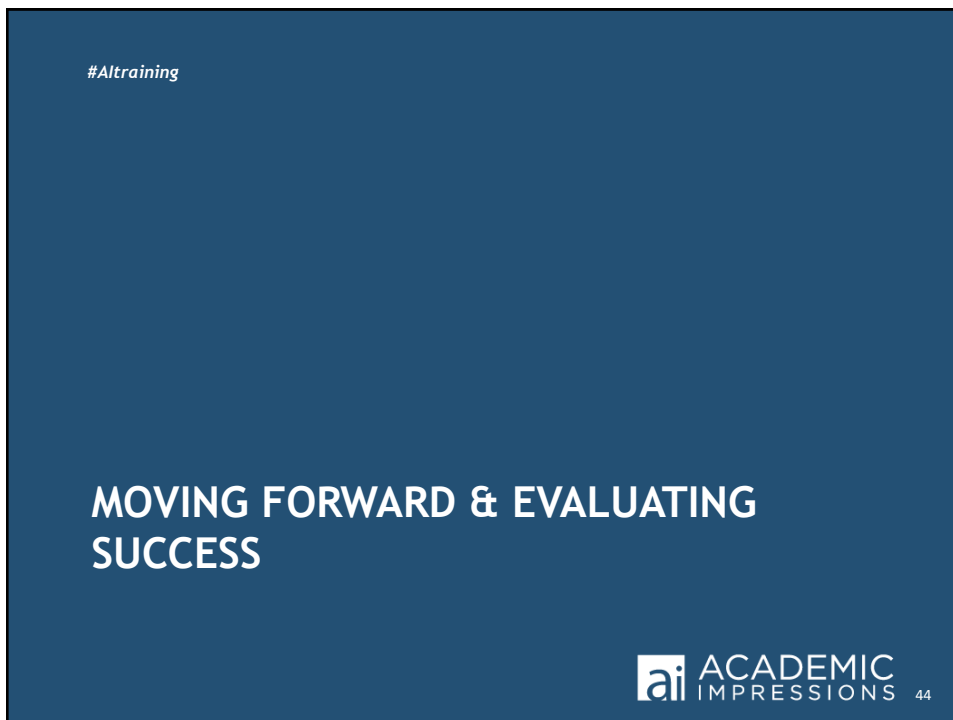
Round-Ups Are Coming
Information about Hometown Round-Up events will be available soon. These are exciting and informal events, hosted by chapters outside the Tampa Bay area, for incoming USF freshmen and their families prior to the fall semester. They are a chance for students and parents to meet other families and offer local alumni an opportunity to welcome the newest members of our Bulls family. If your chapter is considering hosting a round-up activity, please contact your liaison.

Spring Commencement May 6-8
We are looking for volunteers to help with our commencement tent and welcome the newest grads! Please contact [Tyronne Gray](#).

Don't Forget About Event Paperwork
For all events, no matter how small, please make sure to



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PROGRAM ADDITIONS AFTER YEAR ONE

- Leadership Training
 - Half-day for local leaders
 - Topics
 - Taking responsibility
 - Maintaining leadership
 - Fundraising
 - Attended by 26 alumni representing nine groups
- Scholarship Funds
 - How to for online fundraising campaign




CHANGES AND TRENDS AFTER 18 MONTHS

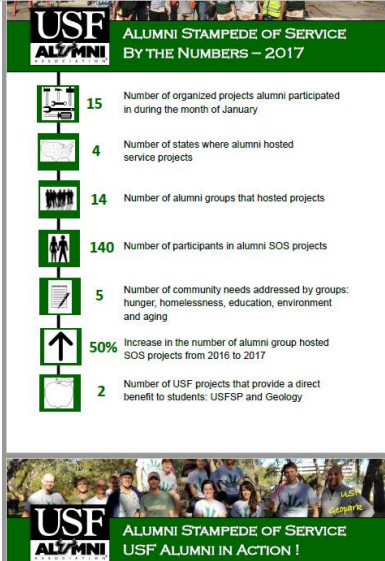


- Increased Participation in
 - Scholarship Fundraising
 - Stampede of Service
 - Conference Calls
- Continued Struggles With
 - Paperwork submission
- Moving Phases
 - Accelerated due to activity
 - Decelerated due to leadership or lack of dept. support






RESOURCE



USF ALUMNI STAMPEDE OF SERVICE BY THE NUMBERS - 2017

- 15 Number of organized projects alumni participated in during the month of January
- 4 Number of states where alumni hosted service projects
- 14 Number of alumni groups that hosted projects
- 140 Number of participants in alumni SOS projects
- 5 Number of community needs addressed by groups: hunger, homelessness, education, environment and aging
- 50% Increase in the number of alumni group hosted SOS projects from 2016 to 2017
- 2 Number of USF projects that provide a direct benefit to students: USFSP and Geology

USF ALUMNI STAMPEDE OF SERVICE
USF ALUMNI IN ACTION !



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CONTINUING TO EVALUATE SUCCESS

NEAR END OF YEAR THREE

- Most groups are on track to meet all expectations
- Working on a plan to meet expectation for 2018 with groups that are not currently on-track
- As new groups are added to the structure first year is used as a learning year

CONTINUING TO EVALUATE SUCCESS

- Continue to Take into Account
 - Overall health of each group
 - Feedback from volunteers
 - Numbers and statistics (*# events, attendance, \$ raised*)
 - Unique qualities of each group



LOOKING TOWARDS THE FUTURE

- Challenges
 - Staffing
 - Funding
- Grow
 - Leadership Academy
 - Fundraising opportunities
 - Online merchandise
 - Email solicitation
- Key Focus Areas
 - Meet all expectations
 - Become self-sufficient





RESOURCE

USF Alumni Online Resources

[Project Group Evolution Overview and FAQ](#)

[Alumni Groups Landing Page](#)

[Scholarship Giving Pages](#)

[Volunteer Leader Resources](#)

[Grant Program and Application](#)

[Raising Awareness and Fundraising \(conduct a one week online social media fundraising campaign\)](#)

[T-shirt Sales Site for Pinellas County Bulls](#)



RESOURCE

USF Alumni Status Reports





TAKEAWAYS

- Plan strategically, invest where you'll get the largest return and don't be afraid to make the tough decisions. Not all groups can experience the highest of success...and that's okay.
- Be honest and upfront with your volunteers (and your staff). Set clear expectations and stick to them.
- Don't get frustrated with resources that you lack. Instead, take advantage of those you have. Use your website and other virtual tools to stay in touch with your volunteers and help them connect with each other.



TAKEAWAYS

There is no such thing as one size fits all

Find out what makes your program unique and incorporate those special qualities. There will be ups and downs and changes along the way. That is the nature of working with volunteers and all part of the process.





QUESTIONS



EVALUATION

Thank you!

Please remember to complete the event evaluation.
Your comments will help us continually improve the
quality of our programs.

<https://www.surveymonkey.com/r/SHXBBDJ>

