

Measuring and Evaluating Your Alumni Relations Program Online Training

Please use the following documents as a way to make the most of this online training; they are intended to work alongside the presentation, as well as prepare you for next steps in the evaluation of your alumni relations program. These documents can be used to watch the online training individually, or to be collaborated on with a group.

Additional Resources

1. [Metrics Worksheet](#) – *Page 2* – Plan to use this worksheet after Ray talks through slide 13. It can also be used on an ongoing basis to understand if you have a holistic package of program metrics.
2. [Penn State Strategic Plan](#) – *Pages 3-24* – For your review during Ray’s mention of it.
3. [Planning Worksheet Sample](#) – *Page 25* – After the webcast, view this and the following document to start diagnosing current, and proposing future programs.
4. [Planning Worksheet Template](#) – *Page 26* – Blank version of file above to use on your programs.

MEASURING AND EVALUATING YOUR ALUMNI RELATIONS PROGRAM

Operational	
Current Metrics: <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	Available Data: <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Transactional	
Current Metrics: <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	Available Data: <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Attitudinal	
Current Metrics: <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	Available Data: <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Strategic Plan | 2013-2015



Approved unanimously by
the Executive Board of the
Penn State Alumni Association
April 18, 2013

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Introduction

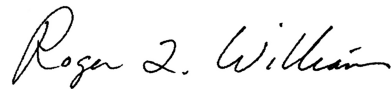
The Penn State Alumni Association concludes work on its current five-year strategic plan on June 30, 2013. Although the University is holding strategic planning in abeyance for the 2013–14 academic year, the Alumni Association’s Executive Board asked the staff to develop a new, short-term plan to bridge the next two years, when a new University president will be in place and the University-wide strategic planning process will be renewed.

What follows is a strategic plan designed to identify those priorities deemed most important for the Alumni Association to pursue during the period of crisis-related uncertainty and turbulence. The plan differs considerably from its predecessor, both in the reduced number of strategic priorities and in the orientation and content of those priorities.

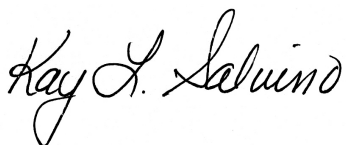
Still, the 2013–15 Strategic Plan presented here provides a roadmap for the future focused on enhanced membership service, organizational growth, crisis impact management, strengthened alumni engagement, relationship development with key constituencies, and financial security for the country’s biggest, best, and most ambitious dues-paying alumni organization.



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Strategic Goal 1: **Accelerate membership growth**

Rationale: Membership growth will continue to be of utmost importance to the Alumni Association, for several reasons: it drives revenue, which in 2011–12 amounted to \$2.5 million in dues payments; it provides a stable base for Alumni Association programs; it enables the Alumni Association to further strengthen its claim as the world’s largest dues-paying alumni association, a point of pride for all Penn Staters; and it demonstrates organizational vitality better than any other indicator, which is particularly important during the current institutional crisis. During the last four years of the current strategic plan (2008–12), membership has grown 5.2 percent, from 160,742 to 169,209.

GOAL: Grow membership to 178,000–180,000 by June 30, 2015.

Strategic Measures

1. Maintain and grow annual retention rates by 2-3 percentage points, from the mid-70 percent range to the high-70 percent range, with particular emphasis on alumni retention rates, by June 30, 2015.
2. Monitor and adjust membership dues rates as needed; in particular, introduce a reasonable rate increase in life membership once during this time period, without eroding the natural growth dynamic of this vital constituency.
3. Increase student membership from 11,878 in 2011–12 to 15,000 by June 30, 2015; measure and track membership conversion rates for Blue & White Society members to paid membership as alumni.
4. Increase the number of associate members (friends) from 20,263 in 2011–12 to 24,000 by June 30, 2015.
5. Improve the conversion rate of gratis to paid members from 10 percent in 2011–12 to 15 percent by June 30, 2015.
6. Increase World Campus alumni membership rates from 45.2 percent in 2011–12 to 50 percent by June 30, 2015. Relatedly, study the efficacy of membership solicitations for participants in Penn State’s new MOOC (Massive Open Online Courses) programs to be offered through Penn State Outreach.
7. Devise approaches to move Alumni Association chapters toward 100 percent membership in the Alumni Association.
 - Meet with selected Alumni Association chapters to discuss pilot projects for a co-membership campaign.

Strategic Goal 2: **Manage crisis impacts in concert with our mission**

Rationale: The institutional crisis of 2011–12 stemming from the Sandusky scandal has changed everything. The anger of some alumni, aimed mainly at the Board of Trustees and the president of the University, continues to roil the University community. Through the crisis, the Alumni Association has strived to stay true to its mission of serving both alumni and alma mater, adopting a six-point crisis management framework to guide its actions that proved to be effective through December 2012 in maintaining its credibility with alumni, according to surveys.

Through the first year of the crisis, the Alumni Association has emerged in a strong position, as measured by membership growth, response to entrepreneurial programs, and attendance at events, not to mention relatively high trust standings for the credibility of its actions and communications, as compared with the Board of Trustees and the University administration.

Although institutional progress is being made on some important fronts, the crisis will continue to morph and mutate during the next several years in response to court trials and other unforeseen developments, challenging the Alumni Association as never before to continue serving its constituencies effectively and well. The crisis has become a preoccupation of staff and volunteer leadership, adding stress and a sharply increased workload on top of the Alumni Association's basic mission-driven work, but also creating opportunities to demonstrate our value to the entire University community.

GOAL: Emerge from the crisis with the Alumni Association's credibility and reputation stronger than ever, due to our efforts to increase alumni understanding of crisis dynamics and add unique perspectives; advance healing and promote pride in Penn State's culture and academic excellence; and materially contribute to creating a stronger University able to assert its global leadership at an even higher level.

Strategic Measures

1. Survey alumni opinion on a periodic basis to guide Alumni Association actions and to inform the larger University community, as was done in May 2012 and December 2012.
2. Implement the six-point crisis management framework and alter it as needed:
 - Fulfill the Alumni Association's mission and sustain our credibility
 - Facilitate the expression of alumni opinion
 - Demonstrate concern for the victims and support solutions to the problem of child sexual abuse
 - Become part of the larger institutional strategy and response
 - Generate communications designed to address the issues head on and forthrightly
 - Monitor impacts and adjust programs as necessary
3. Increase and institutionalize the role of the Alumni Association "at the table," including Board of Trustee committees, Board of Trustee meetings, internal administrative councils and initiatives, and University-wide initiatives as appropriate. Examine the

efficacy of adding these new responsibilities to the new operating agreement with the University.

4. Increase alumni interest and the broadest possible participation in Board of Trustee and Alumni Council elections. In 2012, alumni participation in the BOT election was 19 percent of the electorate, and for Alumni Council it was 8.06 percent.
5. Comment as appropriate on the crisis from time to time as circumstances may warrant.
6. Generate communications and programs that increase pride in Penn State's institutional culture of academic excellence and ensure they are conveyed to alumni volunteers within our affiliate group network.
7. Champion constructive ways to channel alumni energy to strengthen both the Alumni Association and the University, building on our plan introduced in August 2012 encouraging alumni to:
 - Volunteer, Join, and Support
 - Communicate and Tell our Story
 - Donate to Worthy Causes
 - Show Up in Person
8. Support and participate in programs and activities of the University and organizations dedicated to addressing issues of child sexual abuse, such as programs by the Pennsylvania Coalition Against Rape (PCAR), the Penn State Hershey Center for the Protection of Children, University training and education programs, and the efforts to develop a Child Advocacy Center (CAC) in State College and elsewhere in Pennsylvania.
 - Encourage and support affiliate group activity with local organizations devoted to addressing child sexual abuse.
9. Play an appropriate role in town-gown initiatives designed to promote healing, pride, and economic stability in the Centre County region, such as Together We Are One, Downtown State College, the Chamber of Business & Industry of Centre County, etc.

Strategic Goal 3: Strengthen revenue streams

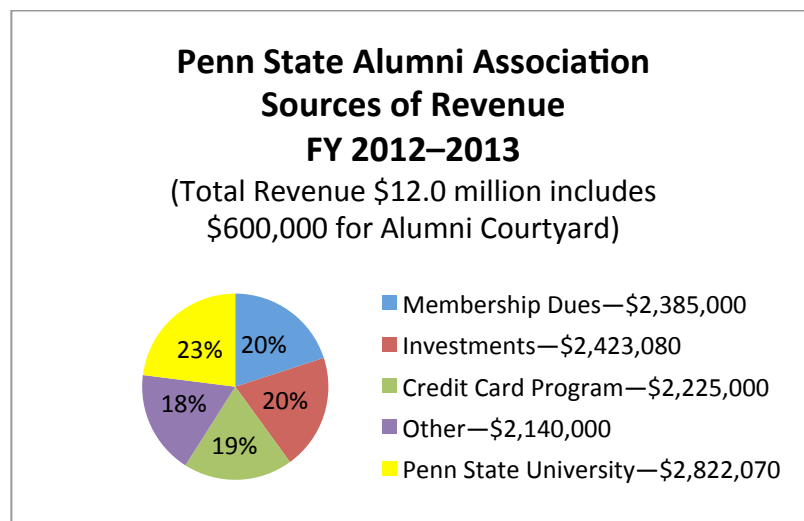
Rationale: The last five years have posed enormous budgetary challenges to the Alumni Association. The recession diminished our endowment holdings, from a high of \$55 million in 2007 to a low of \$38 million in 2009, with some rebound to \$44.6 million in 2012. Further clouding the scene is a pending substantial reduction in the Alumni Association’s financial services partnership with Bank of America, projected at a 36 percent decrease over the next five years in total compensation.

Nonetheless, through stringent budget management, the introduction of and enhancements to various entrepreneurial programs, and new cost recovery measures, the Alumni Association has managed to stay in relatively good health financially over the last five years—from \$11.2 in total revenue in 2008 to a low of \$10 million in 2010 to a growth to \$12 million in 2012, the latter made possible by a \$1 million infusion from the University for employee benefits.

But with the still-parlous state of the national and state economies, the reduction of the annual \$2.225 million guarantee from Bank of America, and possible impacts from the crisis, it is critical that the Alumni Association do everything possible to sustain and grow its revenue streams, which provide the means to accomplish our ends.

GOAL: Sustain the Alumni Association’s revenue streams at a floor of at least \$11 million per year during the two years of this strategic plan, with the goal of increasing revenue to \$11.6 million by 2015–16, the year after the strategic plan ends.

The following charts present the Alumni Association’s revenue streams for 2012–13 and the revenue projection for 2015–16.



**Penn State Alumni Association
Sources of Revenue
FY 2015–2016**

(Total Revenue \$11.6 million)



Strategic measures

1. Work with the Investment Subcommittee and our endowment fund managers at Vanguard to grow our investment portfolio by a median return of 8.3 percent per year (with a volatility index of 12.5 percent), which will keep the Alumni Association ahead of inflation and allow for real growth of 2-3 percent per year—even while accounting for the annual withdrawals in the neighborhood of \$2.3 million for operating expenses. Relatedly, continue to review the endowment spending policy, this year reduced from 4.8 to 4.7 percent, with an eye toward lowering it further as circumstances allow.
2. Manage the new five-year contract with Bank of America such that the growth in new accounts provides substantial compensation beyond the annual guaranteed amount (which totals \$7.125 million over five years).
3. Strengthen the new development/fundraising program, particularly in the major gift and endowment arena, to generate additional income streams. The goal is to be raising \$1 million annually in gifts and commitments to the Alumni Association by June 30, 2015.
 - Create new Alumni Association Development Philanthropy Council
 - Increase number of donors identified for goal setting from eight to 15 individuals
 - Increase numbers of proposals delivered from eight to 15 annually
 - Increase personal visits from 80 to 140
 - Identify potential corporate major gift support
 - Steady state on prospect/donor staff assignments at 105 prospects (maximum allowed)
4. Grow the Sustaining Life Membership program (from \$168,000 to \$422,000 in its first four years) to a dependable income stream of at least \$500,000 a year. Relatedly, enhance the stewardship aspect of this program.

5. Generate a dues increase for life memberships during this time period to produce approximately \$200,000 in new revenue annually to grow the corpus of the Life Member Trust.
6. Renew the contract with our insurance programs partner, Collegiate Insurance Resources, such that the next contract provides an increase of at least 25 to 50 percent or \$1 million–\$1.5 million in guaranteed revenue over the current guarantee, which is \$3,095,000 over seven years. The current agreement expires December 31, 2014. Investigate the potential for using insurance programs as an inducement to growing membership.
7. Promote growth in sponsorship and advertising revenue, which has been sharply curtailed by the recession. Sponsorship dollars should grow from \$35,000 per year in 2011–12 to \$100,000 per year by June 30, 2015, and advertising revenue in *The Penn Stater* should grow from \$250,000 at present to \$300,000 by June 30, 2015.
8. Develop an online advertising program to benefit the Alumni Association.
9. Develop new entrepreneurial programs and partnerships as opportunities permit.
10. Ensure that University financial support of the Alumni Association continues at current (23.5 percent of total revenue) or greater levels and that it stays at least consistent with inflation.
11. Promote opportunities for partnership and collaboration with other University and Alumni Association organizations to offset costs.

Strategic Goal 4: **Clarify the Alumni Association's relationship with the University**

Rationale: The current crisis, and the trauma it has created for the larger University, reveals the need for more clarity and a recalibration of the Alumni Association's relationship with its sponsoring institution. Of primary concern is that the Alumni Association's unique status [as a 501(c)(3) non-profit organization] be recognized and respected, and that it be granted "exceptional" status within the University structure where warranted to carry out its mission.

GOAL: Create a new covenant that clarifies the Alumni Association's organizational status and its relationship to the larger University, while providing sufficient latitude to carry out its mission effectively.

Strategic Measures

1. Hire new, independent legal counsel well versed in non-profit law and positioned to create a memo of understanding between the Alumni Association and the University. Ideally, this new legal counsel would be hired on a retainer basis and would be able to develop a long-term relationship with the Alumni Association and an appreciation of our unique role.
2. Re-craft Alumni Association bylaws, policies, and procedures to reflect the contours of the formalized relationship with the University (example: current policies do not reflect the dual reporting relationship of the executive director, nor do they state that all Alumni Association staff are employees of the University).
3. Develop a clearer understanding among the Board of Trustees as to who we are, what we do, and what our value is to both alumni and alma mater.
4. Strengthen our place and role within our University administrative structure, the Division of Development and Alumni Relations, particularly to achieve the best possible support for our general financial posture, our personnel policies and financial procedures, and our urgent need for more support from our information systems infrastructure.
5. Work with the current and new presidents of the University to help accomplish University objectives and to create a clear understanding of our mission and role. Provide robust support for Penn State's new president, expected to take office by July 1, 2014.
6. Increase appreciation and support for our mission and roles among the deans of the academic colleges and the chancellors of the Penn State campuses; sustain to the extent possible our current levels of financial, partnership, and staff support to the 35 academic units of the University.

- Reaffirm our commitment to paying off the remaining \$600,000 in scholarship and graduate/fellowship support, as denoted in the Alumni Association’s \$2.1 million pledge to *For the Future: the Campaign for Penn State Students*. The sixth of seven payments (\$300,000) is due in the 2013–14 academic year, and the seventh and final payment is due in the 2014–15 academic year. If possible, we may find ways to pay off the entire sum before the campaign ends on June 30, 2014.
 - Complete one round of Alumni Association impact studies for the academic colleges and the vice president for Commonwealth Campuses. Involve the college alumni societies in this process as well.
 - Partner with the academic colleges and campuses as appropriate to plan and deliver Alumni Association programs and events.
7. Develop a clearer understanding of the Alumni Association’s mission, role, contributions, and limitations among our 270 affiliate groups.
- Closely align data requested through affiliate group annual reports with the Alumni Association’s mission and role.
 - Clearly articulate the Alumni Association’s mission, role, contributions, and limitations during affiliate group leader training opportunities.
 - Create webinar series designed to inform volunteer leaders of the Alumni Association’s mission, role, contributions, and limitations.
 - Include this topic as part of the on-boarding process each regional director undertakes for new affiliate group presidents.
 - Include this topic as part of the campus and college society meetings that occur during Alumni Council meetings.
8. Through communications programs and other efforts, build greater awareness for what we do as an organization and how our alumni relations efforts contribute to the betterment of the University.
- Continue participation on the University Marketing Council, the Social Media Council, the Philadelphia Branding Council, the Brand Steering Committee, and similar University-wide communications groups to ensure strategies and initiatives consider the alumni audience.
 - Increase the level of content sharing and cross-marketing between the Alumni Association and central University offices—specifically, the Office of University Relations, Intercollegiate Athletics, and others—so that the impact of our members, affiliate groups, student organizations, and alumni generally is heightened across all distribution channels. This includes social media as well as traditional outlets such as live.psu.edu, gopsusports.com, college and campus publications, etc.
 - Make efforts to communicate more effectively with the University Faculty Senate and student government organizations (UPUA, CCSG, GSA) to demonstrate our contributions to the University that have relevance to their interests.

Strategic Goal 5: Enhance diversity at the Alumni Association and the larger University

Rationale: America is becoming a minority-majority nation. Rapid increases in the diversity of the student body at Penn State are also apparent. During the last five years, the Alumni Association has striven to ensure that its governing boards stayed ahead of the student body (18 percent in 2012–13) in terms of proportional representation from alumni of color, defined by the U.S. Office of Affirmative Action as four distinct classes: African America, Latino/Hispanic, Asian/Pacific Islander, and Native American Indian. That progress, however, is becoming harder to maintain, calling for renewed efforts on the several diversity fronts: diversity in governing boards, diversity in Alumni Association membership, diversity in Alumni Association staff, and—equally as important—a renewed emphasis on the various diversity programs of both the Alumni Association and the University that demonstrate the Alumni Association’s commitment.

GOAL: Increase diversity in measurable ways for all three constituencies—governing board, membership, and staff—while sustaining if not increasing our support for key University diversity programs.

Strategic measures

1. Ensure that diversity activities and diverse constituents continue to be well represented in Alumni Association communications vehicles.
2. Ensure that a robust proportion of speakers (alumni, faculty, staff) of diverse backgrounds/topics are evident in our signature intellectual and cultural programs and events.
 - Steward the Educational Advisory Committee to assist in identifying diverse speakers.
3. Increase the number of women and diverse alumni represented in the Alumni Association’s recognition programs—Alumni Fellow, Honorary Alumni, Alumni Achievement Awards, and Volunteer Awards programs.
 - Concentrate especially on improving the representation of women in the Alumni Fellow ranks, from an average of 22 percent during the 2008–12 period to 40 percent by June 30, 2015.
4. Ensure that Executive Board and Alumni Council are composed of alumni of color in a proportion that is ahead of the student body.
 - Sustain Executive Board composition of at least 20 percent (22 percent in 2012–13) alumni of color.
 - Increase Alumni Council composition to at least 16 percent (12 percent in 2012–13) alumni of color.

5. Increase Alumni Association staff to 7 percent staff of color from its current 4.3 percent.
 - Increase the representation of such staff from three to five during this time period.
6. Strengthen the affiliate group AIG universe for diversity groups.
 - Nurture and grow the new Lions in Recovery AIG, slated for charter in November 2013.
 - Sustain and grow, if possible, the network of African American Alumni Organization AIGs.
 - Create a new and robust Latino/a AIG.
 - Develop new AIGs around prominent Asian constituencies.
 - Revitalize and grow the LGBTQA AIG.
 - Develop new diversity-centered AIGs as opportunities present themselves.
7. Sustain a strong focus on African American alumni.
 - Support the biennial Black Alumni Reunions to the fullest extent possible.
 - Support African American history and culture at Penn State through historical markers, publications, Martin Luther King Jr. Day programs, and other events and programs.
 - Showcase the avenues in which African American alumni participate in, and contribute to, the life of the Alumni Association and the larger University.
8. Develop a strong focus on Latino alumni.
 - Support the development and dissemination of Latino/a history at Penn State.
 - In addition to the Latino/a AIG, regenerate an Alumni Association chapter in Puerto Rico.
 - Demonstrate the avenues in which Latino/a alums participate in, and contribute to, the life of the Alumni Association and the larger University.
9. Continue our partnership with, and support of, the Native American Indian Pow-Wow, now in its 10th year at University Park.
10. Make inroads to engaging international alumni, beginning when they are students on our campuses.
 - Commission discussions, focus groups, and surveys with international students to develop strategic approaches to working successfully with them as alumni.
 - Continue to maintain an Alumni Association presence at events with international students sponsored by the Office of Global Programs; collaborate with OGP as opportunities allow.
 - Engage international students by encouraging their membership and participation in Blue & White Society programs.

11. Develop a stronger ethos in the Alumni Association of respect, civility, tolerance, acceptance, and appreciation for diversity in its many manifestations, including diversity of thought, opinion, and the expression thereof.
12. Strengthen and clarify the mission of the Diversity Committee of Alumni Council and connection to the Alumni Association.

Strategic Goal 6: Strengthen alumni engagement

Rationale: A fundamental tenet of the Alumni Association's mission is to connect alumni with the University and with each other. Accordingly, the Alumni Association at root is a relational organization with its 169,000 members and 560,000 alumni, focused on strengthening the bond between alumni and the University with an eye to increasing their interest, support, and contributions of time, talent, and treasure during the next two years in a climate of anger, mistrust, and turmoil.

GOAL: Increase alumni and member support of both the Alumni Association and the University as measured by their participation in Alumni Association programs, events, and services and the results of periodic alumni opinion surveys.

Strategic measures

1. Strengthen affiliate groups in number, membership, and support of both the Alumni Association and the University.
 - Support opportunities to partner with affiliate groups when possible and appropriate on projects concerning membership and the communication of programs that require a wider appeal than the group is able to accomplish.
 - Create educational series (webinars, alumni leadership conference sessions) aimed at achieving strong bench strength of affiliate group boards.
 - When warranted and requested by affiliate group board members, remove ineffective affiliate group leaders from presidential roles who may be preventing the respective organizations from growing and thriving.
 - Support opportunities of affiliate groups to partner with other Penn State entities to accomplish programming that reaches a broader constituency than the group is able to accomplish.
2. Continue placing particular attention on alumni engagement in key metro areas: Philadelphia, Pittsburgh, Harrisburg, New York City, and Washington, D.C.
 - Work collaboratively with college and campus alumni societies to implement a program in an additional metro area every other year.
3. Devise ways of involving greater numbers of young alumni (ages 22-35) in the life of the Alumni Association.
 - Study various professional organizations/associations that maintain their own allied organizations or chapters for young professionals. Determine best practices and adapt them to the Alumni Association. Also, work more closely with our best performing affiliate groups with younger members, such as the D.C. Metro Washington Chapter, for useful ideas that can be extrapolated to other groups.
 - Explore the establishment of advisory groups, panels, or focus groups of young alumni to advise us on how we can better communicate with and engage young alumni.

4. Provide valued help to alumni in their jobs, careers, and professional lives, of special importance in the recessionary and “disappearing jobs” environment.
 - Promote opportunities for alumni to network for career and professional development by offering networking events within the five targeted metro areas at least one event per city annually and four in the Philadelphia area annually.
 - Capitalize on new technologies to expand online services/resources to serve alumni regardless of geographic location or time constraints.
 - Continue to partner with alumni chapters and groups to meet the career needs of their members.
 - Partner with campuses and colleges—both Career Services and Alumni Relations staff—to develop and implement programs and resources to meet the career development needs of their alumni.

5. Strengthen the Alumni Association’s intellectual and cultural outreach to alumni, demonstrating our support of the University’s academic programs.
 - Explore the implementation of a young alumni member/non-member rate for programs and events.

6. Strengthen the partnership with Penn State World Campus, which generates the highest alumni membership rates across the University, as this entity continues to grow dramatically.
 - Work with World Campus staff to create an Alumni Constituent Society.
 - Meet regularly with World Campus Blue & White Society advisors.
 - Include World Campus alumni and current students in announcements of all events and programs.
 - Explore collaborative opportunities for World Campus students and alumni with geo-based Alumni Association chapters and groups.
 - Explore engagement/membership opportunities for students enrolled in Penn State MOOCs.

7. Focus communications programs to build greater awareness among all alumni and friend constituencies for our organization’s contributions and impact on the University. Build a plan that prioritizes new initiatives according to audiences, message, channels, and available resources.
 - Explore increased use of video to illustrate programs and impact.
 - Explore paid media opportunities and campaigns at the statewide and national level, contingent upon funding availabilities.
 - Determine how the University’s re-branding efforts both impact and benefit the Alumni Association and, contingent upon a positive assessment, implement with our identity systems and promotional campaigns.
 - Find new avenues for repurposing content for wider exposure and maximum effect. This includes member-benefit publication content (i.e. *The Penn Stater* magazine,

AlumnInsider, The Football Letter), as well as original content produced for online or print distribution.

- Refine and expand social media strategy to ensure robust member, alumni, student, parent, volunteer, and friend engagement and interaction.

Strategic Goal 7: **Sustain and strengthen relationship with other key constituencies/stakeholders**

Rationale: Though alumni are the primary universe for the Alumni Association, its relationships do not stop there. The Alumni Association works effectively because it maintains relationships with other constituencies that are key to its growth, vitality, and organizational effectiveness.

GOAL: Strengthen relationships in measureable ways for other key constituencies: Current students, Intercollegiate Athletics, state and federal government, the Division of Development and Alumni Relations, and Alumni Association staff.

Strategic Measures

Alumni Association Staff:

1. An effective, high-performing alumni association begins with an effective, high-performing staff. During the next two years, we will continue developing programs and events, informal as well as formal, to sustain and improve the morale of Alumni Association staff, who have been through a very tough year of crisis response with more challenging times ahead.
 - Support the work of the Alumni Association Internal Relations Group as it devises stimulating, exciting, and enjoyable activities to engage and inspire our staff.
 - Hold staff appreciation events at least twice a year.
2. Promote and reward staff as merited.
3. Encourage participation in professional development programs/conferences, as budgets allow.

Current Students:

1. Strengthen and grow Alumni Association student programs, particularly the Blue & White Society (12,000 members), the Lion Ambassadors, and the FastStart mentoring program for underrepresented students, as budgets permit.
2. Devise ways of introducing greater numbers of students to the Alumni Association and to their future roles as alumni and members of the Alumni Association.
 - Collaborate with Career Services to offer LionLink and other programs (such as Final Four) to demonstrate to the larger University community the ways in which the Alumni Association supports students (our alumni-in-training).
 - Strongly communicate Alumni Association support of THON, Homecoming, the “Alumni Love THON” initiative, and Alumni Association staff and alumni chapter events.

- Collaborate with Alumni Association student groups (Lion Ambassadors, Blue & White Society, and FastStart) and the College of Communications to create a five-member student communications advisory group to serve several purposes: 1) keep staff and volunteer leaders in touch with issues, trends, technology, and other areas of importance to current students; 2) increase awareness among students about Alumni Association activities and opportunities for future involvement; and 3) serve as a means to generate stories and social media postings for distribution on student audience channels about alumni/Alumni Association efforts, which will increase visibility to this important constituency.
3. Demonstrate to the larger University community the ways in which the Alumni Association supports students (our alumni-in-training).
- Generate at least two stories per quarter about Alumni Association efforts to support students that can be distributed on University-wide media channels (newswires, psu.edu website), and/or via affiliate group networks to increase the visibility of such initiatives. These could include programmatic interactions, philanthropic/scholarship support stories, mentoring examples, or other similar items of interest.
 - Consider paid advertising to generate high visibility for such initiatives as the \$2.1 million Alumni Association gift in support of scholarships.

Intercollegiate Athletics:

1. With the pending expiration (as of June 30, 2013) of the Alumni Association's status as a keystone partner with Intercollegiate Athletics (ICA), due to the reduction of Bank of America revenue, devise ways of sustaining the good relationship with ICA and of creating opportunities for visibility in ICA programs, events, and venues.
- Explore the possibilities of formalizing new partnership agreements at lower tier levels.
 - Explore ways of creating visibility with a-la-carte funding proposals.
2. Continue Alumni Association support to the extent possible for the football program in particular, as it strives to regain its strength in the face of severe NCAA sanctions.
- Continue sponsoring, in cooperation with Development and Intercollegiate Athletics, annual Coaches Caravans, which in 2012 reached 4,815 alumni and friends in its inaugural year.
 - Continue sponsoring pep rallies/alumni mixers at all away games.
 - Continue to support the Beaver Stadium S-Zone, organized by the Lion Ambassadors.
3. Support other programs as opportunity and resources allow, with perhaps a special focus on the aborning NCAA men's and women's hockey programs.
- Explore a role for the Blue & White Society in the new student section of Pegula Ice Arena.

- Through the Alumni Association's chapter network, support Penn State student-athletes and the Intercollegiate Athletics program on the road by promoting athletic events and encouraging members and alumni to attend games and matches away from University Park.

State and Federal Government:

1. Continue to strengthen the effectiveness of the Penn State Grassroots Network, now 10 years old, in its work of supporting University goals with state and federal governments through the twin goals of education (keeping advocates well informed) and advocacy (providing volunteers with the tools and expertise they need to reach out to elected officials).
 - Maintain membership levels at 35,000+.
 - Increase *Information Update* readership, increase responses to online action alerts, and boost participation in signature Network events.
 - Encourage greater participation on the part of Alumni Council members in Network activities.
2. Keep alumni and friends informed about the essential nature of Penn State's land-grant status, the University's mission, and the benefits and importance of its long-standing relationship with state and federal governments.
 - Place increased emphasis on social media platforms for communication with members.
3. Develop an effective "case," with yearly alterations as circumstances warrant, for the importance of Penn State's annual appropriation from the Commonwealth of Pennsylvania and what it allows the University to do for Pennsylvania.
 - Emphasize the basics—keeping tuition increases low, maintaining the in-state tuition discount, and keeping the Commonwealth campuses strong.
 - Emphasize how Penn State positively impacts the quality of life and economic development, supports thousands of Pennsylvania jobs, and the extent to which it is replacing the mines and mills as the engine of the state's new economy based on knowledge and technology.
4. Develop programs and events to engage 35,000 alumni every year, to the fullest extent possible, in the mission and goals of the Penn State Grassroots Network.
 - Boost participation in signature events such as Capital Day (400+ at present), and Friend of Penn State legislative award luncheon.
 - Increase number of networking receptions in metro areas or key legislative districts from two to four annually.
5. In addition to alumni, nurture wider engagement in the Grassroots Network among other vital constituencies: students, parents, faculty, and friends of the University.

- Reach out to Penn State's Center for Democratic Deliberation and develop programs of mutual benefit.

Division of Development and Alumni Relations:

1. Clarify and develop the Alumni Association's role within the larger Division of Development and Alumni Relations (DDAR), appreciating that the 70 Alumni Association staff constitute 20 percent of the Division's 350 employees.
 - Showcase Alumni Association goals, accomplishments, events, and plans at the three all-DDAR staff meetings annually.
2. Participate in creating a shared communications platform for both Alumni Association and Development staff to replace Launchpad.
 - Survey Alumni Association staff to determine how the new intranet platform can best serve their needs; include feedback mechanisms on the new intranet to encourage continuous dialogue about its efficiency and effectiveness.
 - Ensure that the intranet includes relevant news, membership data/statistics, forms, and other resources pertinent to the Alumni Association; use it as a means to increase awareness among our Development colleagues about alumni relations activities, events, and opportunities.
 - Identify and equip the appropriate Alumni Association staff with the appropriate time and resources to contribute content on a regular basis to the shared intranet.
3. Attract more support for our needs from the Division's information services operation.
 - Identify existing personnel/staff resources within the Information Systems unit or explore hiring personnel with the requisite skill set to create a dedicated "Web Solutions Team" responsible for identifying, implementing, and supporting online tools and technology that best serve the Alumni Association and the alumni relations function. This includes conducting a comprehensive audit of existing technology to identify needs, budgetary requirements, and solutions that will ensure the Alumni Association's ability to provide state-of-the art services to its members.
4. Integrate databases, develop project management and constituent relations management tools, and ensure stronger information systems integration to better serve the needs of the Alumni Association.
 - Alternatively, explore an Association Management System (AMS) to integrate our various data needs in comprehensive fashion.
5. Continue to nurture the strong relationship with the Office of Annual Giving, which is essential to our success.



Hintz Family Alumni Center

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U.Ed. ALU 13-62

Advancement - Planning Worksheet

Area: Advancement		Responsible: Erin Johnson	
Program: Homecoming & Reunions		Year: 2014-2015	
Program Description: Plan and execute a comprehensive Homecoming weekend for parents, alumni and students with specific focus on 10, 25, 50 year groups.			
Program Plan and Tactics			
Special Events			
<ul style="list-style-type: none"> • Organize series of competitive and recreational athletic events with alumni and student participation. • Coordinate alumni hospitality tent. • Set up activities for younger children and families of alumni. • Arrange alumni event and pinning ceremony for anniversary classes. • Arrange Homecoming open house and guided tours. • Arrange new parent welcome BBQ and networking event. 			
Class Reunions:			
<ul style="list-style-type: none"> • Work throughout the year with anniversary class representatives to build communications with classmates and update lost records. • Organize individual class parties with special focus on special years and support to other years. • Arrange class activities within the school and reconnect with teachers. 			
Communication/Admin:			
<ul style="list-style-type: none"> • Coordinate advertising in Ashbury News, Alumni Connect, email invitation, outreach through Facebook, and direct mail out . • Coordinate post event survey and follow up information, tracking results and participation. • Coordinate volunteer involvement and recognition. 			
Desired Outcome: Higher attendance and engagement year over year and to improve and strengthen relationships with alumni. Overall satisfaction with events and greater awareness of current state of the school.			
Program Measurements:		Cost Estimates/Budget:	
<ol style="list-style-type: none"> 1. All honored classes having reunion and 40% attendance by honored years. 2. 400 parents attend and 60% of new parents attend. 3. 30% of current students attend 4. 300 for alumni for pinning reception. 5. 90% event satisfaction 		<ol style="list-style-type: none"> 1. Class Activities \$5,000 2. Homecoming \$11,500 3. Promotion \$2,000 4. Supplies \$1,000 <li style="text-align: right;">Total \$19,500 	

ALUMNI PROGRAMMING WORKSHEET

Area:	Responsible:
Program:	Year:
Program Description:	
Program Plan and Tactics:	
Desired Outcome:	
Program Measurements:	Cost Estimates/Budget: