

# ALUMNI BOARDS: STRENGTHEN YOUR STRATEGY AND GROW ENGAGEMENT

July 15 - 16, 2019 | Boston, MA



## *Develop your alumni or advisory board in a way that allows you to accomplish strategic objectives and goals.*

Learn how you can increase the effectiveness of your advisory board and its members' involvement. Representing alumni relations, annual giving, and academic perspectives, our expert instructors will share practical tips and advice on how you can create a more effective board, including:

- Defining your board's purpose, roles, and strategy
- Recruiting and onboarding board members and leaders
- Increasing the effectiveness of your meetings
- Identifying and solving communication issues
- Assessing your board's effectiveness with established metrics

## BRING YOUR BOARD MEMBERS WITH YOU

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This conference is carefully designed for institutional representatives charged with increasing board effectiveness, as well as board members. You are highly encouraged to bring teams comprised of both constituents. Save over 15% when you register three or more colleagues and/or board members.

## WHO SHOULD ATTEND

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Although the content of this program is in reference to alumni boards, the material will serve those managing all advisory boards, such as chapter and regional boards or dean's advisory boards. Past attendees have found it incredibly advantageous to attend this conference with their colleagues and board members.

# AGENDA

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## Day 1

### Conference Registration and Continental Breakfast (included in registration fee)

8:00 – 8:30 a.m.

### Opening Comments & Introductions

8:30 – 9:00 a.m.

### Defining Board Purpose and Roles

9:00 – 10:15 a.m.

We will start this session with a conversation around how alumni boards have evolved and how and if they should be best utilized. Assuming a board is the best route for your institution, we will discuss how to translate the board's purpose into meaningful responsibilities and how your board should work with institutional staff.

### Morning break

10:15 – 10:30 a.m.

### Setting Board Strategy

10:30 – 11:45 a.m.

With your board purpose set, and member responsibilities defined, the next step is to begin developing your strategy. This session will address how to cooperatively define long- and short-term strategy, and then how to ensure board buy-in from that strategy. We will then discuss how to move from strategy to implementation, and how best to assign responsibility for tactical issues, including committee charters and policies and procedures that are outside of the bylaws.

### Lunch (included in registration fee)

11:45 a.m. – 12:45 p.m.

### Working Session: Reviewing and Evaluating Board Structure

12:45 – 2:00 p.m.

Structure should reflect a board's purpose, roles, responsibilities, and process. Unfortunately, committees, policy, and bylaws are often created on an ad hoc basis and/or not updated regularly. During this session, the faculty will discuss how to create or revise your structure to make it reflective of your mission and will address how to most effectively implement your structure.

### Identifying, Recruiting, and Developing Your Pipeline of Board Members

2:00 – 3:15 p.m.

Identifying ideal board members from your pool of alumni leaders requires cooperation from all areas within advancement and the board. This session will focus on best practices for selecting and recruiting productive, dedicated board members, including how to convert board members from other volunteer programs. Knowing that succession planning can be tricky to navigate, we will talk through building a leadership pipeline. You will have time to review a matrix to identify and gaps in your current board.

### Afternoon Break

3:15 – 3:30 p.m.

# AGENDA

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## **Day 1 (CONTINUED)**

### **Onboarding, Educating, and Training New Members**

3:30 – 4:45 p.m

Bringing new board members up to speed, while integrating them into the existing membership, is essential to managing turnover effectively. This session will walk you through how to onboard and educate new members and provide tips for training them for their roles on the board.

### **Networking reception (included in registration fee)**

4:45 – 5:45 p.m

## **Day 2**

### **Continental breakfast (included in registration fee)**

8:00 – 8:30 a.m

### **Role of the Board in Fundraising Efforts**

8:30 – 9:45 a.m

What is the role of the alumni board in institutional advancement? In this session, we will identify different fundraising models and describe the relationship of the board with the advancement office. The faculty will also outline the role of the alumni board during a campaign.

### **Morning break**

9:45 – 10:00 a.m

### **Developing an Intentional Board Culture**

10:00 – 11:15 a.m

A healthy board culture is essential for a board to effectively execute its strategy and accomplish its goals. In this session, we will provide examples of effective board cultures, ways to evaluate your board's current culture, the importance of positive leadership, tone at the top, team building, active engagement, productive discussions, socialization, working through conflict, and continuous culture improvement.

### **Board Meeting Format and Agenda**

11:15 a.m – 12:00 p.m

There is nothing more frustrating than a board meeting that fails to accomplish its goals. This session will explore different format/agenda options for board meetings and discuss how to apply the best options to your meetings to make them more productive. You will learn how to create agendas that address strategic initiatives and leave board members energized. There will be time to tackle your next board meeting agenda with these new techniques in-hand.

### **Lunch (included in registration fee)**

12:00 – 1:00 p.m

# AGENDA

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## ***Day 2 (CONTINUED)***

### **Establishing Board Metrics and Assessment**

*1:00 – 2:15 p.m*

An effective alumni board must identify clear criteria for measuring success across activity—ideally at the mission level, the goal level, and individual level. This session will show you how to formally and informally evaluate your alumni board and its members, including how often to conduct your assessments.

### **Afternoon Break**

*2:15 – 2:30 p.m*

### **Navigating Your Board through Change**

*2:30 – 3:45 p.m*

Natural board flux can rapidly shift to uncertainty and inaction without proper leadership. However, being well prepared can allow you to address changes with ease. This session through inevitable change.

### **Faculty Panel, Final Q&A and Closing Comments**

*3:45 – 4:15 p.m*

## INSTRUCTORS

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### **Matthew Colson**

#### **Executive Director, Alumni Relations, Stony Brook University**

Matthew is an industry leader in alumni relations, building successful programs both in small private college and large public university settings. At Stony Brook, Matthew is responsible for the vision, strategy, revenue generation, communications, and program development for engagement of SBU's alumni worldwide. He works closely with the thirteen college deans and University Advancement colleagues to develop meaningful student and alumni experiences that create and sustain lifelong relationships with the university. He also serves as Executive Director of the Stony Brook Alumni Association, working closely with its Board of Directors, Executive Board, and Committee Chairs. Currently Stony Brook is in the final year of a \$600 million campaign that is unprecedented in the State University of New York (SUNY) system.

### **Susan Pyron**

#### **Associate Vice President of Annual Giving, Alumni and Parent Relations, Gettysburg College**

Susan E. Pyron has direct responsibility for the alumni association's board of directors and oversight of the annual giving, athletic giving, alumni relations, and parent relations offices focusing on constituent engagement and securing current operations support. Previously, Susan was the executive director of the Commission on the Future, a project that engaged nearly 400 alumni, parents, and friends in a year-long study that formed the foundation of Gettysburg College's former \$100M campaign. Gettysburg College is currently in the public phase of a \$150 million comprehensive campaign.

### **Sandra Richtermeyer**

#### **Dean of the Manning School of Business, University of Massachusetts, Lowell**

Dr. Richtermeyer's teaching interests are in the areas of corporate governance, accounting information systems, and managerial, governmental, and nonprofit accounting. Her research interests include corporate governance, technology enablement and enterprise systems, nonprofit accounting, and professional issues for accountants.

Dr. Richtermeyer works actively with a variety of professional organizations and is a frequent speaker for professional development programs on financial leadership, technology integration, organizational governance and performance measurement. She has authored many articles in academic and practitioner publications. Before joining UMass-Lowell, Dr. Richtermeyer was Associate Dean and Professor of Accountancy at Xavier University, on faculty at the University of Wyoming and the University of Colorado at Denver, and taught while completing her doctoral studies at the University of Colorado at Boulder.

## LOCATION

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***July 15 - 16, 2019 | Boston, MA***

***Hotel:***

Hyatt Regency Boston Harbor  
101 Harborside Dr  
Boston, MA 02128  
617.568.1234

**Room rate:**

\$219 + tax

**Room block dates:**

The nights of July 14 and 15, 2019 .

**Room block cutoff date:**

June 23, 2019.

Reserve Your Room: Please call 617.568.1234 and indicate that you are with the Academic Impressions group to receive the group rate. Please book early - rooms are limited and subject to availability.

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