

Strategic Plan – Initiative Work Plan FY2014

Initiative Name: Strengthen the engagement of Alumni in the life of the University Date: 5/2013

Goal # 5 Goal Chair(s) Jay Gatrell and Greg Goode

Initiative # 2 Initiative Chair(s) Rex Kendall

Thesis Statement: Alumni engagement is an important component of the expansion and development currently occurring at Indiana State University. “Best practices” of alumni development, outreach, cultivation and engagement must become an ever increasing focus at all levels within the University; undergraduate involvement, office/departmental, respective Colleges, and the University as a whole. The initiative strategies outlined below are necessary for increasing and optimizing the University’s efforts to engage and benefit from alumni involvement; now and in the future.

1. Introduction/Background – What?

The Indiana State University Alumni Association is the central organization that connects all alumni constituent groups to the University. With an alumni base of nearly 100,000, we must begin/continue to develop programs that will engage our constituents, no matter their age, to their alma mater. We continue to improve current techniques and search for new methods that will engage alums in both an active and passive participatory model.

2. Proposal/Purpose/Justification – Why?

The Alumni Association is the “front door” to the University for our alumni and friends. Strengthening programs, gaining a better understanding of “best practices” within the profession and increasing opportunities to engage in the life of the University are all priorities for the current Alumni Association staff. The establishment and/or re-establishment of Regional Alumni Associations, particularly within Indiana, continues to provide outreach, engagement and discovery of interested Indiana State University Alums. However, more outreach and engagement can be accomplished with the correct strategies in place. With this in mind, the FY14 plan will focus on the following areas;

1. Training and professional development for the current Alumni Association staff;
2. Implementation of ideas that will continue to engage and discover alumni and friends;
3. Purchase of technology that will allow for the collection of alumni data (names, address, phone numbers, emails, etc....) at all on and off-campus events;
4. Resources that will allow Alumni Association staff to highlight and share the on-going success occurring at Indiana State University;
5. Discovery of best practices to engage undergraduate students, on-line distance education students and International Alumni.

Strategic Plan – Initiative Work Plan FY2014

3. Discussion of Past Years Results – Benchmark Successes?

(This section needs to be as long as is necessary to assess whether funding should be continued.)

The most successful initiative of FY13 was the establishment/re-establishment of the Regional Alumni Associations. The Regional Associations provide an opportunity for regional alums to gather for social events, recruitment events, networking and philanthropic endeavors; just to name a few. This initiative will continue and reasonable benchmarks will be established to measure success.

Due to the complete replacement of the full-time, paid Alumni Association staff over the past 13 months, the remaining FY13 benchmarks were not accomplished.

However, FY13 was not entirely lost. Even though the submitted FY13 initiatives were not accomplished, with the exception of the Regional Alumni Associations, actions were taken to create a solid working-base for future initiatives. For example, in order for alumni to have a strong connection to the University, a new website needed to be developed and launched. The Alumni team, under the direction of the ISU-F Communications and Marketing staff and with the assistance of staff from the University - particularly OIT, Communications and Marketing, and Enrollment Management – developed and launched the new ISU Alumni Association webpage. The feedback has been extremely positive and work continues to utilize this important tool to inform, connect and engage our constituents.

In addition, a complete revision of the ISU Alumni monthly newsletter was initiated. Previously, the newsletter was inconsistent in the development and delivery. However, with the addition of a new Alumni Association staff member dedicated solely to communications, stewardship and cultivation, the monthly newsletter has been and will continue to be delivered electronically to our alums on a monthly basis

4. Work Plan, Next Fiscal Year – Action Steps – Process – How?

- 1) Continue to develop and establish Regional Alumni Association groups throughout Indiana and selectively within the U.S. Our goal for FY14 is to “take back the state” as it relates to the development and establishment of the alumni groups. Currently there are six Regional Alumni Association’s established within Indiana (Northwest Indiana – Hammond/Gary area; Northeast Indiana - Fort Wayne; Central Indiana – Indianapolis; Southwest Indiana - Evansville; Wabash Valley - greater Terre Haute area; and Dubois County, Indiana). Our goal is to strengthen our current regional groups and expand. The expansion will include the development of Regional Alumni Associations in the following areas: Chicago Area; Edgar County, Illinois; North Central, Indiana – South Bend; South Central, Indiana – Bloomington; St, Louis Area; Tampa, Florida area and Los Angeles, California area.
- 2) Aggressively collect, use and store contact information (name, address, email and cell phone number). It is imperative new and updated contact information be collected and stored for

Strategic Plan – Initiative Work Plan FY2014

current and future communications. The use of social media and constantly discussing with our constituent base the extreme importance of collecting contact information will be utilized. In addition, the use of the new webpage and the monthly newsletter will be utilized. However, portable technology must be made available for the collection efforts to be successful.

- 3) Secure funding for the printing of one-hard copy issue of the ISU/Alumni Magazine. Alumni Associations throughout the country struggle with the task of connecting with their constituent base. Due to the varying ages of the constituent base, the social media opportunities best serve a certain age segment. However, not all constituents prefer or want to be engaged with their alma mater via the social media outlets. In an effort to connect with all ages, the use of a variety of communications options (social media, hard copy, email, etc...) must be utilized to engage, connect and inform our constituent base. In addition, the hard-copy magazine will be used as one of many significant “benefits” to join the soon to be implemented dues paying Alumni membership program.
- 4) Training, professional development and networking of the current Alumni Association Staff. In order for progress to continue and new initiatives to be developed, the current Alumni Association staff must be trained and gain a better understanding of “best practices” within alumni work. Given the fact that all the staff members within the Alumni Association are new to their current positions, opportunities to attend conferences, workshops and participate in webinars must be made available to the staff.
- 5) Utilize technology to share with our constituent base the outstanding success ISU has experienced over the past few years. This will be this use of portable technology such as iPads, etc.....
- 6) Explore best practices and utilize on-campus resources (Nonprofit Leadership Alliance) to begin engaging undergrad students, on-line students and international students in their responsibilities as active and engaged participants with the ISU Alumni Association.

5. Reporting and Deliverable Schedule – When?

Progress and updates on action items will be reported to the goal chairs at regularly scheduled meetings and to the ISU-Foundation administration at staff meetings throughout the fiscal year. In addition, progress will be reported in the Alumni Association Annual Report.

6. Budget – How Much, a General Discussion of Funds Use?

- 1) No Funding requested - Continue to develop and establish Regional Alumni Association groups throughout Indiana and selectively within the U.S. Our goal for FY14 is to “take back the state” as it relates to the development and establishment of the alumni groups. Currently there are six Regional Alumni Association’s established within Indiana (Northwest Indiana –

Strategic Plan – Initiative Work Plan FY2014

Hammond/Gary area; Northeast Indiana - Fort Wayne; Central Indiana – Indianapolis; Southwest Indiana - Evansville; Wabash Valley - greater Terre Haute area; and Dubois County, Indiana). Our goal is to strengthen our current regional groups and expand. The expansion will include the development of Regional Alumni Associations in the following areas: Chicago Area; Edgar County, Illinois; North Central, Indiana – South Bend; South Central, Indiana – Bloomington; St, Louis Area; Tampa, Florida area and Los Angeles, California area.

- 2) \$8,000 - Aggressively collect, use and store contact information (name, address, email and cell phone number). It is imperative new and updated contact information be collected and stored for current and future communications. The use of social media and constantly discussing with our constituent base the extreme importance of collecting contact information will be utilized. In addition, the use of the new webpage and the monthly newsletter will be utilized. However, portable technology must be made available for the collection efforts to be successful.

Funding will be used to purchase ID/Card readers compatible with iPads and Smartphone technology. The system will be similar to the current ID/Card reader utilized by ISU Public Safety at late dance events. However, the program purchased will utilize the most up-to-date technology for remote use and compatible with current database programs located at either ISU or ISUF.

- 7) \$30,000 - Secure funding for the printing and mailing of one-hard copy issue of the ISU/Alumni Magazine. Alumni Associations throughout the country struggle with the task of connecting with their constituent base. Due to the varying ages of the constituent base, the social media opportunities best serve a certain segment. However, not all constituents prefer or want to be engaged with their alma mater via the social media outlets. In an effort to connect with all ages, the use of a variety of communications options (social media, hard copy, email, etc...) must be utilized to engage, connect and inform our constituent base. In addition, the hard-copy magazine will be used as one of many significant “benefits” to join the soon to be implemented dues paying Alumni membership program.
- 3) \$8,000 - Training and professional development of the current Alumni Association Staff. In order for progress to continue and new initiatives to be developed, the current Alumni Association staff must be trained and gain a better understanding of “best practices” within alumni work. Given the fact that all the staff members within the Alumni Association are new to their current positions, opportunities to attend conferences, workshops and participate in webinars must be made available to the staff. (The years of experience of the current Alumni Association staff total 13 months combined experience; this is the total for work experience as it relates to direct alumni work).

In order for progress to be made in the area of Alumni programming, engagement, cultivation, discovery and sustainability, the current staff must have knowledge and awareness of “best practices” in the field. The Council for Advancement and Support of Education (CASE)

Strategic Plan – Initiative Work Plan FY2014

<http://www.case.org> provides outstanding regional, national and international workshops, seminars and webinars for Alumni professionals. Even though the ISU Alumni Association currently provides quality services and programs for our constituent base, in order to expand our outreach and engagement efforts, we must be informed of programs that are being implemented successfully in the Alumni professional field to continue or success.

- 4) \$1,500 - Utilize technology to share with our constituent base the outstanding success ISU has experienced over the past few years. This will be this use of portable technology such as iPads, etc.....

The requested funds will be used to purchase three (3) iPads for use by the Alumni Association staff during events hosted off campus. In addition, the purchases of the iPads are necessary to utilize the ID/Card reader technology requested to collect alumni contact information.

- 5) \$5,000 - Explore best practices and utilize on-campus resources (Nonprofit Leadership Alliance) to begin engaging undergrad students, on-line students and international students in their responsibilities as active and engaged participates with the ISU Alumni Association.

The engagement and cultivation of a strong alumni base begins during the undergraduate years. This includes students enrolled in on-campus courses, but also for our on-line students. Dr. Nathan Schaumleffel is working with the ISU-Foundation to help build a culture of philanthropy and engagement within the University student body. In addition to the work ideas being presented by Dr. Schaumleffel (discussion meeting will be June 4, 2013), the Alumni Association must have a greater presence on campus throughout the academic year. Progress has been made, starting at the December 2012 and May 2013 commencements, with the Alumni Association diploma cover inserts, but outreach must take place prior to commencement ceremony.

7. Stakeholders and Management Plan – Who?

The work plan, budget request and oversight will be monitored, supported and updated by the following individuals:

Rex Kendall – Director, Indiana State University Alumni Association;

Hilary Duncan – Assistant Director, Indiana State University Alumni Association;

Catherine Saunders – Executive Vice President of Advancement, Indiana State University Foundation;

Amy Westgard – Associate Vice President of Advancement Services, Indiana State University Foundation,

Keary Dye – President, Indiana State University Alumni Association Board

Strategic Plan – Initiative Work Plan FY2014

8. Outcome Assessment & Future Testing

(How will we know that we were successful?)

Our success will be determined by the increase in the collection of contact information, the sustainability of current and the establishment of additional Regional Alumni Associations and increase in program attendance of our events due to active use of social media and hard copy print of the ISU/Alumni magazine.

As indicated in the March, 2013 Goal 5 Stakeholders meeting, the Indiana State University Alumni Association is initiating a “do-over” of our strategic plan. It is imperative we create and implement a solid foundational base to continue our outreach and engagement efforts. Before we can measure our success, we must have in place technology appropriate for our needs, a trained Alumni Association staff and a strong working relationship with our campus colleagues. Extreme progress has been made, particularly with are campus relationships, but more needs to be accomplished. Our success will be based on the continued collaborative approach we are utilizing within the Alumni Association.

9. Line Item Budget Discussion that tracks Budget Templates ...

Please refer to sections 4 and 6 of this proposal