

# Strategic Plan – Initiative Work Plan FY2015

Initiative Name: Strengthen the engagement of Alumni in the life of the University Date: 5/2014

Goal #: 5 Goal Chair(s): Gregg Goode

Initiative #: 2 Initiative Chair(s): Rex Kendall

**Thesis Statement: Alumni engagement is an important component of the expansion, success 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. This includes the development and establishment of a culture of student involvement prior to becoming degree recipient alumni. The initiative strategies outlined below are necessary for increasing and optimizing the University’s efforts to engage and benefit from improved alumni involvement; now and in the future.**

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## **1. Introduction/Background – What?**

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

## **2. Proposal/Purpose/Justification – Why?**

Efforts to build and maintain a strong Alumni Association are important to the success of the University. Alumni relationship building and engagement is a lifelong process; starting during the undergraduate experience. The process involves a variety of initiatives and outreach spanning several years. However, with the development and continued support of a vibrant and engaging alumni program, the involvement and leadership of alumni can help determine the University’s level of success in educating citizens; particularly within Indiana.

Alumni are permanent lifelong members of the University community. By creating a purposeful Alumni Association, we are building a base of support that will enhance student recruitment, improve fundraising, strengthen networking and career opportunities, increase legislative advocacy and continue community engagement. In an effort to develop and expand our alumni programming efforts, increased support must be provided. With this in mind, the FY15 plan will focus on the following areas:

1. Create an environment, by transforming the current ISU Foundation Building, to a destination location for Alumni returning to campus;
2. Support training and professional development for the current Alumni Association staff;

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3. Purchase and support current technology in use that will allow improvements to be made in the collection and storage of alumni data;
4. Support programming efforts that will allow undergraduate students to become familiar with and recognize the importance of the Alumni Association. Establishing an affinity to the Association during the undergraduate years will lead to continued involvement after commencement;
5. Enhance the benefits of the Alumni Dues Membership program – Blue Card Club;
6. Support Regional Alumni Clubs; with special focus in the Indianapolis and Marion County area;
7. Support the marketing and communication efforts to increase license plate sales;
8. Support the successful re-introduction of the STATE magazine as a tool to engage and connect with alumni;
9. Introduce methods to improve functions and operations of the ISU Alumni Association Board of Directors;
10. Enhance the Annual Giving program in an effort to increase the number of alumni donors captured through additional outreach and solicitation.

### **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 initiative has been extremely successful in accomplishing the goals established for FY14; with a few exceptions. Exceptional progress has been made in a few areas; Regional Alumni Clubs, professional development and E-Communications.

Alumni License Plate sales was an area of extreme importance for FY14. Unfortunately, the State of Indiana eliminated the marketing and sales program previously associated with the specialty license plate program. Due to the elimination of the State marketing program, no funding was available to support our license plate effort. The license plate program is an essential component of alumni engagement for the University and the Alumni Association. The support and launch of a successful marketing plan will greatly impact the Alumni Association as we continue to look for income generating opportunities.

Alumni Volunteers continue to increase each year. We will exceed our goal this year in the alumni volunteer category. Discussions continue on techniques we can use to include additional alumni volunteers in our counts; particularly alumni serving on Advisory Boards for specific Colleges and departments.

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Social Networking is an area that exceeded the goal for FY14. We continue to look for new and improved social networking opportunities to advance Alumni outreach and engagement. Facebook and Twitter have been our avenues for success during FY14. However plans to utilize LinkedIn and Instagram are being developed.

E-communications has been extremely successful this year. Our efforts to collect accurate data as it relates to email exceeded our goal by 50%. E-communication is an efficient and cost-effective avenue to communicate with alumni and friends. We will continue to improve our efforts in an attempt to grow the solid success exhibited in this specific area.

The launch of the Alumni Dues Paying program – Blue Card Club – was delayed by 3 months. Our goal was to have 200 new members by the close of FY14. However, due to the delay, the goal will more than likely not be accomplished. I will provide additional data as the fiscal year comes to a close.

Regional Alumni Clubs has been moderately successful in FY14. The Indianapolis Club, our most important, has been extremely successful with events and engagement opportunities. In addition, the Chicago Alumni Club continues to grow and sponsor events in the greater Chicago area. The Regional Clubs located in Northwest Indiana and Dubois County continue to host events and assist with outreach efforts. The Dubois County Regional Alumni Club sponsored two (2), \$1,000.00 student scholarships for students residing in Dubois County. However, the remaining Clubs throughout Indiana are still in the development stages. Development, maintenance and sustainability of the Regional Alumni Clubs remain a high priority for the Alumni Association staff; particularly Clubs within Indiana.

The financial support provided for training and professional development opportunities allowed the alumni association staff members the opportunity to interact with other alumni staff professionals working at institutions in the mid-west. The support provided resources that enabled the alumni staff to gather ideas for program purposes and network; all key factors to the continued success of alumni operations.

Benchmark data reflect the success of Initiative 2. Given that Initiative 2 basically re-launched in FY14, the accomplishments have been noticeable. As we continue to develop and sustain our engagement efforts, success will continue to be evident.

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

1. Create an environment, by transforming the current ISU Foundation Building, to a destination location for Alumni returning to campus

Alumni returning to campus must be able to easily locate the Alumni Office. Currently, the Alumni Offices are not listed on campus maps, designated by any campus signs in front of the ISU Foundation building or visible by signs located on the outside of the ISU Foundation Building. We must include the

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Alumni Office on campus maps (printed and electronic), install signs near and on the outside of the Foundation Building to improve way-finding.

In addition to way-finding improvements, action steps must be taken to improve the current location as a gathering place for alumni and friends visiting campus or the Terre Haute area. We must engage the alumni when they visit campus by providing a gathering place for small groups or individuals. Dedicating and enhancing space on the first floor of the Foundation Building will provide a necessary gathering/socializing place for alumni upon returning to their Alma Mater.

### 2. Support training and professional development for the current Alumni Association staff

Training and professional development for the current Alumni Association staff is essential to continue the implementation of alumni outreach opportunities. The current Alumni Association staff must be trained and made aware of the “best practices” being implemented around the country regarding Alumni engagement and outreach efforts. In addition to the programmatic ideas discovered while attending conferences, the staff is also provided networking opportunities utilized throughout the fiscal year. Alumni staff will continue, if supported, to attend the CASE conference in Chicago. However, conference attendance focused on specific areas of alumni work, such as – regional clubs, membership cultivation, etc.... – will also be explored for staff to attend. In addition to conference attendance, webinars and video streaming opportunities are being explored as training and professional development opportunities.

### 3. Purchase and support current technology in use that will allow improvements to be made in the collection and storage of alumni data

Improvements continue to be implemented regarding data collection and storage. The use of technology, particularly mobile electronic devices, will continue to be used to collect data at events occurring off campus. However, the use of technology must continue to improve in order for successful data collection to occur. The use of a mag-stripe ID card for Blue Card Club (BCC) members must be implemented during FY15. The use of the cards and the purchase of the “readers” will be a collaborative effort between ISU Technology staff, ISU Foundation advancement staff and the alumni staff. In addition, updates to e-communication are essential to the outreach and engagement of alumni, donors and friends of the University.

### 4. Support programming efforts that will allow undergraduate students and parents to become familiar with the benefits of and recognize the importance of the Alumni Association.

In an effort to introduce students and parents to the Alumni Association, programmatic efforts will continue and expand. Establishing an affinity to the Association during the undergraduate years will lead to continued involvement after commencement. Early engagement, both for students and parents, is extremely important for cultivation efforts and development of long term relationships.

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5. Enhance the communication efforts, data collection and the benefits of the Alumni Dues Membership Program – Blue Card Club (BCC)

The launch of the BCC is an integral component of the outreach and engagement efforts. The program provides an opportunity for alumni of all ages to financially support their Alma Mater while receiving discount benefits for their contribution. The benefits program, electronic communication and hard copy mailers must be updated regularly to keep alumni interested in participating and informed of events taking place on campus or in their communities.

6. Support Regional Alumni Clubs

Regional Alumni Clubs are important to the outreach and engagement efforts of the Alumni Association. Once an alumni club is established in a specific area, events and social gatherings are more likely to occur on a regular basis. Participating in Regional Alumni Club activities will allow alumni in a specific area to stay informed of the success occurring on the Indiana State University campus and allow them to reconnect/stay connected with their Alma Mater.

7. Support the marketing and communication efforts to increase license plate sales

Sales of the ISU License Plate are a source of income for the Foundation. In addition to increased scholarships, the ISU License Plate program helps support programmatic efforts of Regional Clubs, Athletic pre-game events and reunions. Due to the state of Indiana eliminating their in-house license plate marketing program, the Alumni Association must increase communication with alumni about the importance of purchasing a an ISU License Plate. The communication will involve: direct mail brochures, social media posts, follow-up and a reminder to renew the license plate.

8. Support the successful reintroduction of the STATE magazine as a tool to engage and connect alumni, donors, students, parents and friends of the University

A printed magazine used by the specific Colleges, Admissions, Administration and the Foundation is a vital component of the information sharing and engagement effort. Alumni, students, parents and donors want to stay informed about what is taking place on the ISU campus. The ISU Foundation and the Office of Communication and Marketing will continue to work collaboratively to develop the STATE magazine; printed at least two times a year; Fall and Spring.

9. Introduce methods to improve the functions and operations of the ISU Alumni Association Board of Directors

The Alumni Association Board of Director's is an important resource for the University. Efforts to improve their effectiveness, their sense of importance and the impact the Board members have collectively and individually on student recruitment, mentoring and career assistance must improve. Providing training and Board development seminars will allow for important improvements to be implemented.

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10. Enhance the Annual Giving program in an effort to increase the number of alumni donors captured through additional outreach and solicitation

The continued increase in alumni participation at events hosted in-state and nationally provides a great opportunity to increase donor outreach and solicitation by expanding annual giving efforts. Increasing the annual giving team to assist during times of heightened Alumni pride could result in an increase in gifts and donations.

### **5. Reporting and Deliverable Schedule – When?**

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

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

1. Create an environment, by transforming the current ISU Foundation Building, to a destination location for Alumni returning to campus - \$54,525.

The location of the Alumni Offices must be easy for alumni and friends to locate and identify upon their return to campus. Currently, the ISU Alumni office location has no presence on campus; no signs nor any designations on campus maps.

\$2,500 – A standard ISU campus sign installed in front of the ISU Foundation Building. The sign will identify the ISU Foundation Office, ISU Alumni Association and ISU Sycamore Athletic Fund

\$10,000 – The current Foundation building has no outdoor signs designating the location of the ISU Alumni Association. Two signs, similar to the current Barns and Noble Bookstore sign on the Cherry Street side of the building, will be installed on the north and south sides of the ISU Foundation Building.

\$22,575 – The patio/plaza area directly in front of the ISU Foundation Building – Meis Plaza – provides an outstanding location to welcome alumni and friends to the University if appropriate furniture and/or seating is available for use. The area provides ample room to meet with Alumni parents during summer orientation and other summer programs hosted at ISU. In addition, the patio area could be a gathering place for alumni to reconnect during Homecoming and prior to football games in the fall, weather permitting. The area needs to have tables with umbrellas, comfortable seating and trash cans.

\$19,450 – In addition to the patio area serving as a gathering place for alumni and friends, the first floor lobby area of the ISU Foundation building should be a gathering place for alumni and friends when they return to campus. The installation of new furniture, along with bookshelves, tables, and a coffee bar, could create an environment that is welcoming for alumni. The space is currently not inviting, nor utilized for a gathering location.

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2. Support training and professional development for the current Alumni Association staff - \$8,000.

\$8,000 – The Alumni staff continues to gain knowledge and discover improved efforts to engage and connect with Alumni. Attendance and participation at regional and national conferences is important for progress to continue. In addition, specific teleconferences and webinars focusing on e-communication, alumni club development and engaging “younger” alumni will be attended.

3. Purchase and support current technology in use that will allow improvements to be made in the collection and storage of alumni data – \$10,000.

\$10,000 – To begin use of Constant Contact. Constant Contact allow the Alumni Association to enhance and support electronic newsletters, invites and announcements; provide electronic offers and promotions; send on-line invites with registration options; and opportunities for Alumni to respond to surveys and submit feedback. More importantly the install will allow access to track the use of our communications. The tracking technology will provide useful information as we expand and grow our e-communications network.

4. Support programming efforts that will allow students and parents to become familiar with the benefits of and recognize the importance of the Alumni Association. - \$28,500.

\$10,000 – Engagement with students during their undergraduate and graduate enrollment years, is extremely important to the success of the Alumni Association. Currently, very little student engagement is supported or implemented by the ISU Alumni Association. Partnering with the ISU Forest and the weekend programming efforts would be a great opportunity to provide name recognition for the Alumni Association. In addition to name recognition, the interactions with Alumni Staff and students would provide a source for future volunteers after the student graduates.

\$15,000 – Parent engagement is an area currently not utilized by the Alumni Association. Parents influence students and their influence could be used to engage students in activities and events hosted by the ISU Alumni Association. In addition, if asked, parents could purchase ISU License plates for their students or purchase their student a membership in the BCC. The development of a parent brochure is essential as we begin to engage with this underutilized constituent base.

\$3,500 – The diploma cover inserts used during the Fall and Spring Commencement Ceremonies has been extremely successful. The insert provides useful information about the ISU Alumni Association, Affinity programs, Career Center opportunities and Regional Alumni Clubs. Most importantly, the insert includes an ISU Alumni window decal. The diploma inserts were first provided at the Fall 2013 Commencement Ceremony. Support is needed to continue this outstanding and successful program.

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5. Enhance communication efforts, data collection and benefits of the Alumni Dues Membership Program – Blue Card Club (BCC) - \$52,440.

\$18,000 – The initial launch for the BCC included a mailer and brochure to the following members of the now non-existent membership dues program: Lifetime members; previous annual members, and alumni 55 years old or older. Due to budget restrictions, direct mail was sent to only three constituent demographics. In order for the BCC to be successful, hard-copy invitations and electronic information must be sent to all alumni. Electronic information will continue to be developed and sent, but without accurate email addresses for all of our alumni, communication efforts are unsuccessful.

\$4,200 – Updating and maintaining accurate data on International Alumni is a monumental task. However, engagement and outreach to our International Alumni is important; particularly as our international student population continues to increase. Electronic means of communication is our best approach to engaging international alumni at the present time. However, emails change and incorrect data exists in files. Working with The Center for Global Engagement, specific embassies within the US, and certain employers, our goal is to reconnect with our International Alumni.

\$15,000 – Our goal with the initial launch of the BCC was to include a membership card with a magnetic stripe to record attendance at events, etc... Unfortunately our efforts were unsuccessful for the 2014 launch. However, it is imperative a membership card be used in the future in order for accurate participation information be collected from alumni.

\$6,000 – The use of portable bar code readers (magnetic stripe card readers) is an important component of the BCC. The funding will be used to purchase magnetic readers compatible with iPads, Smartphone technology or portable hand held devices. The system will be similar to the current ID/Card reader utilized by ISU Public Safety at late night dances. However, the devices purchased will utilize the most up-to-date technology for remote use and be compatible with current database programs in use at ISU, ISUF and/or both.

\$9,240 – The BCC will need staff to support the stewardship, data updates and data entry required to operate and maintain a successful membership program. However, the increased staff support does not have to be from a full-time or part-time staff member. Students currently enrolled at ISU would be outstanding staff members to help support the extra work associated with the launch of the BCC. We are requesting funding for student workers based on 28 hours a week, on a 12 month basis.

6. Support Regional Alumni Clubs - \$6,800.

\$6,800 – The development and maintenance of Regional Alumni Clubs provides an opportunity for alumni networking, socializing and cultivation to occur. Successful Regional Alumni Club events, if the club is established properly and with appropriate support from the Alumni Office, can save time and money. Alums interacting with Alums is a great way to keep the constituent base informed of events taking place on campus, without designating travel funds for staff. However, it is extremely important the Regional Clubs are established properly and function with an informed leadership core group.

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Indianapolis is an area that must have an established and maintained Regional Alumni Association Club. Initially staff must travel on a monthly basis to Indianapolis to meet with alumni and properly develop the core group of volunteers. In addition to staff time and travel, Regional Alumni Club kits must be provided to the regional leaders. The kits will include: thank you cards, ISU give away items – coffee mugs, tumblers, key chains, clothing, etc.... The kits are an investment that will be used by regional leaders to to engage and/or reconnect with alumni in specific areas; including, but not limited to Indianapolis.

7. Support the marketing and communication efforts to increase license plate sales - \$25,000.

\$12,000 – The elimination of the Indiana BMV marketing plan was a significant loss for ISU. Reminder mailings, posters and web advertisements were provided by the state; if utilized. All marketing must now be implemented in-house. Efforts to communicate electronically are effective, but additional communication must be implemented to reach an increased demographic of our constituent base. The strategy to increase license plate sales would include reminder letters and emails to all current plate owners about the renewal process, email and hard copy mailers to previous license plate owners, communication to currently enrolled students informing them of the opportunity to purchase the a license plate and marketing to all ISU employees about the license plate program.

\$8,000 – The creation of an ISU License Plate video will be used at sporting events, on social media (Facebook, Twitter, Instagram and YouTube) and sent electronically to remind alumni and friends of the significance of purchasing an ISU License Plate. The use of video is a new approach, but one that might result in an increase in plate sales.

\$5,000 – Just as solicitation and renewal reminders are important for the purchase of license plates, follow-up and stewardship is important for anyone purchasing a license plate. Communication expressing appreciation for the license plate purchase is important and must be implemented. Funds will be used to follow-up and thank the individual purchasing the plate.

8. Support the successful reintroduction of the STATE magazine as a tool to engage and connect alumni, donors, students, parents and friends of the University - \$75,000.

\$45,000 will provide postage for two printed issues (Fall and Spring) of the updated STATE magazine. In an effort to build engagement and excitement about Indiana State University and our alumni and faculty, two printed issues of the updated STATE magazine will be mailed to alumni, emeriti, donors within the past ten years, and volunteer leaders of Indiana State University.

\$30,000 will provide printing for two issues of STATE magazine to be sent to our alumni, emeriti, donors, and volunteer leadership twice annually. The re-introduction of STATE is a collaborative effort between the University's Office of Communication and the Alumni Association. This piece is intended to engage, excite and encourage key stakeholders to become involved in the life of Indiana State University. By featuring our student, faculty, alumni, and program successes pride in Indiana State University will grow even stronger than it is today.

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9. Introduce methods to improve the functions and operations of the ISU Alumni Association Board of Directors

No Funding Requested

10. Enhance the Annual Giving program in an effort to increase the number of alumni donors captured through additional outreach and solicitations - \$37,740

\$16,000 will provide additional compensation enabling a part-time staff position to be increased to a full-time position. The Annual Giving team currently operates with a professional staff FTE of 1.5. Increasing our staff by .5 will enable the program to grow in scope by allowing the director to engage in more personal visit with alumni donors and seek additional support for Indiana State students and programs. The additional staff time will afford the program the opportunity to implement an on-line engagement and solicitation strategy. Friends Asking Friends and Constant Contact are two new communication systems that will better equip the Alumni Association and Annual Giving program with the tools effectively and efficiently communicate with our alumni in an effort to engage them and secure resources for Indiana State University.

\$9,240 will enable the Annual Giving team to provide a student worker position that will support a variety of areas including personal alumni communication, direct mail solicitations, phone solicitation and general office support. This position is best described as a student professional and meets the expectation of experiential learning that Indiana State strives to provide all our students while, at the same time, strengthening our efforts to engage our alumni.

\$4,500 will increase the printing and postage budget for direct mail solicitations by 10% for the upcoming fiscal year. With the number of donors to Indiana State University being used as indicator of alumni engagement, casting a broader net will contribute to the growth of the Annual Giving program. By inviting more alumni to give the number of donors will increase.

\$5,000 will be used for donor retention. Past donors are more likely to give than non-donors. We strive for continuous engagement and plan to produce a special communication that will be printed and mailed to donors from the past three years that have not yet given again in the current fiscal year.

\$3,000 will provide funding to develop a first-time donor packet. The packet will be sent to alumni donors following their first gift to Indiana State University in an effort to retain them as donors in the future. It will welcome them to the family of ISU donors and encourage continued annual support of Indiana State University.

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### **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 – Executive Director – Indiana State University Alumni Association

Hilary Duncan – Assistant Director – Indiana State University Alumni Association

Ben Kappes – 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

### **8. Outcome Assessment & Future Testing**

(How will we know that we were successful?)

**Our success will be determined by the increase of the number of alumni visiting the ISU Foundation building, the increase in the collection of accurate contact information, the increase in the number of ISU license plates purchased, the sustainability of current and the establishment of additional Regional Alumni Clubs and engaging undergraduate students and parents.**

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

(These sections also need to be as long as is necessary to articulate each of the budget line items.)

Please refer to sections 4 and 6 of this proposal.