

Strategic Plan – Initiative Work Plan FY2016

Initiative Name: Strengthen the Engagement of Alumni in the Life of the University Date 5/2015

Goal # 5 Goal Chair(s) Greg 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.

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 FY16 plan will focus on the following areas:

1. Properly identify the ISU Foundation Building as the home of the ISU Alumni Office;
2. Support training and professional development for the current Alumni Association staff;
3. Support programming efforts and the reorganization of Sycamore Ambassadors allowing 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;

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4. Implement an increased marketing campaign for the Blue Card Club;
5. Support Regional Alumni Clubs and host events in China during the summer 2016;
6. Improve the marketing and communications efforts to increase license plate sales;
7. Continue to introduce methods and ideas to improve functions and operations of the ISU Alumni Association Board of Directors;

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 FY15; with a few exceptions. Exceptional progress has been made in the following areas: Improving student recognition of the Alumni Association, expanding and sustaining Regional Alumni Clubs, attending and participating in professional conferences and increased delivery of E-Communications; particularly the monthly alumni newsletter.

Alumni License Plate sales is an area of extreme importance for FY16. Sales continue to increase with limited marketing and communications efforts. Securing funds to increase direct mail and increased stewardship will improve this extremely important revenue generating program. The license plate program generates income, but more importantly provides outstanding advertisement throughout the State of Indiana by the increased number of license plates attached to automobiles; including motorcycles.

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 implement to accurately and effectively count alumni volunteers; particularly alumni serving on Advisory Boards for Colleges/Departments.

The development and publication of STATE Magazine has been overwhelmingly successful. The collaboration between The Office of Communication & Marketing and the ISU Foundation/Alumni Office must continue. Our Alumni and friends of the University continue to be extremely impressed with the magazine; always asking when the next edition will be delivered.

Social Networking is an area that exceeded the goal for FY15. We continue to look for new and improved social networking opportunities to advance Alumni outreach and engagement. Facebook and Twitter were our main social media outlets utilized during FY15. However, plans to utilize LinkedIn and Instagram are currently being developed.

E-communications has been extremely successful this year. 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 continue the solid success exhibited in this specific area.

The launch of the Alumni Dues Paying program – Blue Card Club – exceeded expectations. Lifetime membership giving was an unexpected revenue source. We are extremely pleased with the success of the program and will continue to develop new benefits to sustain and recruit members.

Regional Alumni Clubs continued to be moderately successful in FY15. 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

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Northwest Indiana and Dubois County continues to host events and assist with outreach efforts. We are very excited about the development of the Fort Wayne Alumni Club. 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 student engagement, development of alumni clubs and network; all key factors to the continued success of alumni operations.

Benchmark data reflect the success of Initiative 2. Given that Initiative 2 re-launched in FY14, the success is noticeable and documented. 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. Properly identify the ISU Foundation Building as the home of the ISU Alumni Office.

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

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 successful trends occurring within the Alumni Office. The current Alumni Association staff must continue to learn 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. 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. Support programming efforts, and the reorganization of Sycamore Ambassadors, allowing undergraduate students and parents 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.

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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4. Increase marketing campaign to help promote the sales of Blue Card Club (BCC) membership

Due to the success of the launch of the BCC program, increased direct mail efforts must be implemented during FY16. Three alumni segments were mailed to during FY15. The success of the program with the direct mail going to only 3 segments, is an indication success will continue if additional direct mail opportunities are implemented.

5. Support Regional Alumni Clubs and host events in China during summer 2016

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 can 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. In addition to engagement opportunities occurring in Indiana, efforts to connect with and engage International Alumni must be developed. University Administration and Faculty will be participating in several events in China during summer 2016. In an effort to work collaboratively and utilize financial resources effectively, hosting and co-sponsoring events in China during the summer 2016 would provide an opportunity for an alumni presence at summer events. In addition, engaging alumni in China might assist student recruitment efforts.

6. Improve the marketing and communications efforts to increase license plate sales

Sales of the ISU License Plate are a source of income for the Foundation. As sales increase opportunities for additional scholarship funding is available from the Foundation. In addition to increased scholarships, the ISU License Plate program helps support programmatic efforts of Alumni Clubs, Athletic pre-game events and reunions. License plate sales have increased continually that last 3 years. Increased direct mail efforts and stewardship, along with student awareness, are areas that will help increase sales. Increased direct mail opportunities must be developed to help sustain and improve license plate sales.

7. Continue to introduce and develop 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.

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.

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

1. Properly identify the ISU Foundation Building as the home of the ISU Alumni Office - \$3,800.

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 or no designations on campus maps.

\$3,800 – 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.

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. Support programming efforts, and the reorganization of Sycamore Ambassadors, allowing undergraduate students and parents 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 - \$22,500.

\$11,000 – Engagement with students during their undergraduate and graduate enrollment years is extremely important to the success of the Alumni Association. Sponsorships and co-sponsored programs, specifically with Union Board and the Forrest, have provided awareness opportunities for students. However, more program opportunities need to be developed. In addition, the re-organization of the Sycamore Ambassador program will provide an opportunity for additional awareness of the Alumni Association by students and parents. very little student engagement is supported or implemented by the ISU 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.

\$7,000 – Parent engagement was introduced during FY15 with limited success due to the lack of parent information. However, changes in parent data collection are being implemented and access to data will be available to the Alumni Office. Once the contact information is provided, parental influence can be utilized in the area of Alumni Office awareness, license plate sales and BCC memberships. The development of a parent brochure, along with other direct mail brochures, is essential as we begin to engage with this underutilized constituent base.

\$4,500 – The diploma cover inserts used during the Fall and Spring Commencement Ceremonies have 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 Spring 2013 Commencement Ceremony.

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4. Increase marketing campaign to help promote the sales of Blue Card Club (BCC) membership - \$9,000

\$9,000 – The initial launch for the BCC included a direct mail brochure to Lifetime members of the previous dues paying program, previous annual members of the dues paying program, and alumni 55 years old or older. Departmental/Office funds have been allocated to mail current dues paying members and Lifetime members a renewal brochure. However, if additional funds can be secured, the direct mail brochure could be distributed to additional alumni. In addition, electronic information will continue to be developed and sent.
5. Support to expand and sustain Alumni Clubs and host events in China during summer 2016 - \$12,500.

\$5,000 – The development and maintenance of Regional Alumni Clubs provides an opportunity for alumni networking, socializing and cultivation. Successful 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 are great ways to keep the constituent base informed of events taking place on campus, without designating travel funds for staff. However, it is extremely important the Alumni Clubs are established properly and function with an informed leadership core group. Departmental/Office funds have been allocated for the development and maintenance of Alumni Clubs within Indiana. However, if additional funds can be secured, opportunities exist beyond Indiana for alumni club development.

\$7,500 – During the summer of 2016 several ISU Administrators, faculty and students will be traveling to China. Dr. John Conant has been in contact with the Alumni Office about the possibility of hosting alumni events in China during his trips in 2016. International Alumni engagement is difficult and time consuming. However, if University events are currently being planned for summer 2016, outreach efforts could be maximized by working collaboratively with our academic colleagues in establishing alumni contacts in China.
6. Improve the marketing and communications efforts to increase license plate sales - \$8,000

\$8,000 – Departmental/Office funds are currently allocated to assist with the direct mail for the purchase of the plates, renewal reminders and follow-up to alumni that purchase license plates. However, if additional funds can be secured, increased revenue could be generated for the Alumni Office/ISU Foundation. Additional funds will be utilized to send direct mail brochures to an increased number of alumni and provide advertisement opportunities in targeted communities with large concentrations of ISU alumni.
7. Continue to introduce and develop methods to improve the functions and operations of the ISU Alumni Association Board of Directors

No Funding Requested

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

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Catherine Saunders – Executive Vice President of Advancement – ISU Foundation

Amy Westgard – Associate Vice President of Advancement Services – ISU Foundation

8. Outcome Assessment & Future Testing

(How will we know that we were successful?)

Our success will be determined and documented by the increase in the number of alumni visiting the ISU Foundation building, the increase in the sales of BCC memberships, the increase in the number of co-sponsored programs available to current students, the increase in the number of ISU license plates purchased, the sustainability of current Alumni Clubs and the establishment of additional Alumni Clubs.

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.