

IDENTIFY
INSPIRE
INVOLVE
INNOVATE

IU

Indiana University
Alumni Association
Strategic Plan
2011-2015



Dear Fellow Alumni:

IU's legacy of alumni leadership began in 1854 in response to a plea for help. A fire had destroyed the seminary that was the heart of IU's original campus. Alumni were enlisted to help raise private funds and rally state support to rebuild. It worked.

As in 1854, IU today benefits greatly from alumni who help their alma mater. Alumni investments of time, talent and treasure are, of course, not only in the university's best interest (thank you!), but also in the best interest of our alumni. The stronger IU's reputation, the longer its reach, the deeper its impact, and the higher the value of an IU degree!

The principal responsibility for mobilizing alumni on behalf of Indiana University falls to the IU Alumni Association. Already, IU benefits from one of the largest alumni associations in the nation. Yet big as we are — and good as we are — the possibilities are far greater.

By tapping our unrealized potential and placing more emphasis on volunteer involvement, we have a chance to move our association from very good to great — and to lift IU and each other in the process. This strategic plan outlines how we will accomplish that.

Yours for IU,



J Thomas Forbes, Executive Director

IU Alumni Association Mission

The IU Alumni Association brings alumni together to serve one another and Indiana University.

IUAA Strategic Plan Purpose

This 2011-2015 plan explains how the Indiana University Alumni Association will advance the mission and priorities of Indiana University by involving IU alumni in service to each other and their alma mater.

IUAA Strategic Plan Objectives

- Enrich the lives of alumni by offering them remarkable learning experiences through engagement with Indiana University.
- Increase alumni gifts of time, talent, and treasure by creating meaningful opportunities for alumni to be engaged and involved on behalf of Indiana University.
- Develop an exemplary Indiana University advancement and alumni relations organization respected for its energy, expertise, effectiveness, and inclusiveness.



CORE STRATEGIES: THE FOUR-I FORMULA FOR SUCCESS

Outcome Measures

The Indiana University Alumni Association will develop concise metrics and a simple scorecard for assessing progress on this plan, with emphasis on these indicators:

- 1) Growth in the breadth, depth, and diversity of alumni involvement with Indiana University, the IU Alumni Association, the IU Foundation, and IU's schools and campuses. (Alongside the typical emphasis on quantity, there will be renewed focus on quality of relationships.)
- 2) Growth in alumni membership, participation, and annual giving to Indiana University.
- 3) Development of more robust alumni programs and groups.

IDENTIFY

IDENTIFY alumni most likely to help. IUAA will focus its resources on a diverse group of IU graduates with a high probability for significant involvement with Indiana University over the course of their lives.

INSPIRE

INSPIRE alumni by asking what matters most to them and sharing meaningful information. Inspire IU graduates with interactive communication and experiences to solicit their views, identify their interests, introduce them to role models, explain needs and involvement opportunities, and engage them in conversations.

INVOLVE

INVOLVE alumni in personal enrichment and service opportunities. Create opportunities for IU graduates to invest time, talent, and treasure in ways that are relevant, meaningful, and beneficial to one another and Indiana University.

INNOVATE to create a remarkable association. Transform IUAA into an exemplary advancement and alumni relations organization respected for its effectiveness, energy, expertise, and inclusiveness.

INNOVATE

IDENTIFY

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IUAA will focus its resources on a diverse group of IU graduates with a high probability for significant involvement with Indiana University over the course of their lives.

- a. **Collaborate with IU and IUF partners and alumni leaders to achieve increased alumni involvement.** Shape programs, alumni communities, and recruitment strategies that embrace the richness and diversity of Indiana University and its alumni body.
 - i. Conduct research to identify and target investment in programs to attract and retain alumni most likely to be significantly involved with IU over the course of their lives.
 - ii. Collaborate with IU and the IU Foundation to develop technology and data systems to capture individual alumni needs, interests, preferences, and manage communication and involvement.
 - iii. Develop with the IU Foundation an annual planning process and advancement summit for all alumni-relations and development staff at Indiana University.

- b. **Engage the alumni of tomorrow by involving key students today.** Engage the most-likely-to-volunteer alumni while they are still students, including men's and women's fraternity leaders, student organization leaders, resident assistants, etc.
 - i. Assess student alumni affiliate groups on each campus and work with relevant IU units to establish a "final-year experience" leading to increased retention of recent graduates as engaged alumni.
 - ii. Bring together current and former leaders of primary student organizations to celebrate their connections and build relationships in order to develop a pipeline of alumni leaders.
 - iii. Develop a chapter-level program in targeted cities to connect recent graduates who have moved from their campus of origin to new communities.
 - iv. Provide for student representation on the Board of Managers.

- c. **Engage more diverse alumni of Indiana University.** Embrace the richness and diversity of IU and its alumni body by supporting current initiatives and creating new awareness of alumni wants and needs.
 - i. Collaborate with the IUF Women's Philanthropy Council to best serve IU alumnae.
 - ii. Work with the IU Foundation and the Office of the Vice President for International Programs to expand the number of alumni chapters abroad and increase giving and voluntary service among alumni living outside the United States.
 - iii. Collaborate with the IU Foundation and the IU Office of the Vice President for Diversity Equity and Multicultural Affairs to define strategies for key affiliate groups as well as increased giving and volunteering by alumni of color.
 - iv. Collaborate with the IU Office of the Vice President for Regional Affairs, IUF Office of the Vice President for Regional Campus Development, chancellors, and campus staff to define strategies for regional campus alumni relations.





INSPIRE

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- a. **Develop a strategic and collaborative communications plan based more on asking than telling.** Focus on input and feedback in every possible interaction with alumni. Focus communications on the benefit and personal value of serving each other and IU.
 - i. Implement an IUAA annual marketing and communications plan to inspire alumni to share their perspectives and become involved.
 - ii. Collaborate with IU Public Affairs and Government Relations to build IU's capacity to communicate its brand personality and position.

- b. **Customize communications to alumni.** Tailor communications and programming to inspire individuals and address niche groups.
 - i. Review the *Indiana Alumni Magazine* to assure alignment of institutional priorities and alumni interests, maximize its appeal, leverage IU alumni and employee storytelling, encourage feedback and conversation, and achieve greatest-possible return on resources.
 - ii. Collaborate with IU and the IU Foundation to develop technology and data systems to manage and tailor alumni communication according to individual needs, interests, preferences, and involvement.

- c. **Embrace new media.** Develop, launch and continually enhance an interactive media strategy that capitalizes on free technology and encourages dialogue, inspires action, and increases connections.
 - i. Implement a new alumni-centered Internet presence for the IU Alumni Association that leverages social media and other emerging technologies.
 - ii. Collaborate with the IU Office of Creative Services to offer professional enrichment for alumni relations staff and volunteers in the use of social media, storytelling, and interactive conversation.

INVOLVE



INVOLVE alumni in personal enrichment and service opportunities. Create opportunities for IU graduates to invest time, talent, and treasure in ways that are relevant, meaningful, and beneficial to themselves, one another and Indiana University.

- a. **Focus on volunteer involvement.** Embrace IUAA's legacy as a "commitment cultivator" and renew IU's tradition of alumni leadership and service to each other and to IU.
 - i. Define and develop an initial set of nine areas to help alumni serve each other and IU:
 - Career development
 - Diversity and multiculturalism
 - International outreach
 - Personal enrichment
 - Philanthropy
 - Spirit, pride, and tradition
 - Student recruitment
 - Student and recent graduate enrichment
 - University advocacy, citizenship, and recognition.
 - ii. Create Executive Council program-review committees that align with these nine areas.
 - iii. Collaborate with IU partners and alumni groups to build a comprehensive calendar of events, activities, and programs that coincides with the "seasons" of the academic year.

- b. **Empower the Alumni Programs team to create meaningful experiences and service opportunities.** Shape organizationally sound programs to involve, enlighten, and engage alumni.
 - i. Develop and package a series of "programs in a box" and regular tours of signature events that solicit alumni feedback, facilitate networking, encourage conversation, and introduce/advance service and learning opportunities — all while relieving the pressure to proliferate programs.
 - ii. Working with the IU Foundation and a representative group of alumni relations and development staff at the campus and unit levels, develop and launch an institutional strategy for volunteer recruitment, leadership development, and involvement that aligns with institutional needs and priorities across key alumni roles:
 - Adjunct faculty and guest speakers in courses
 - Advisers/board members
 - Advocates and champions
 - Award committee members
 - Athletics boosters and sports fans
 - Career development clients (both employers and employee roles)
 - Competition judges
 - Consumers of gear, personal enrichment experiences, entertainment, and events
 - Donors and dues payers
 - Exemplars and award winners
 - Readers of various print and electronic communications (some paid and some not)
 - Recruiters of students
 - Speakers, presenters, and performers (for off-campus personal enrichment, professional development, lifelong learning, entertainment experiences, stewardship experiences, and programs)
 - Student leaders who can be developed into volunteer leaders and donors after graduation
 - Student advisers, mentors, and role models.
 - iii. Refine an annual series of personal-enrichment experiences such as lectures, seminars, and travel to inform, inspire, inquire of, and engage alumni around the state, nation, and world.

- c. **Empower the Alumni Communities team to involve individuals and groups through targeted programs, experiences, and interactive communication.** Segment and manage audiences and groups to systematically engage alumni to serve each other and IU.
 - i. Convene a staff group and subject-matter experts to develop an annual Alumni Community Development Plan to define roles and strategies for affiliate groups, chapters, and constituent societies.
 - ii. Initiate a research program to identify alumni needs and interests for personal enrichment and service.
 - iii. Develop an alumni volunteer-training and leadership-development curriculum.
 - iv. Pilot a regional alumni council program to bring together chapter leaders for a weekend to share challenges and best practices, offer guidance and feedback to alumni relations staff, and establish operating plans.
- d. **Move from a tactical-response mode to a strategically planned intentional operation.** Strengthen organizational planning, coordination, accountability, and assessment.
 - i. Implement an annual alignment process with key IU partners to prioritize work by IUAA in support of University Administration, IU Foundation, Athletics/Varsity Club, and Bloomington schools and units. Over time, expand to other campuses and units identified by the IU President and IUAA Board of Managers.
 - ii. Collaborate with IU partners to implement a series of signature experiences to meet advancement and personal-enrichment objectives (such as We Are IU!, IU Live!, Winter College, Mini University, Alumni Leaders Conference, etc.).

INNOVATE

INNOVATE to create a remarkable association.

Transform IUAA into an exemplary advancement and alumni relations organization respected for its effectiveness, energy, expertise, and inclusiveness.



- a. Pursue continuous program alignment and improvement.** Provide greater clarity and accountability by creating an annual process to align IUAA programs with priorities of the IU units and alumni we serve.
 - i. Create an annual performance management program that provides staff with a prioritized work plan.
 - ii. Create an annual alignment process to prioritize work done for units/groups served by IUAA.
 - ii. Establish an organizational scorecard to track progress on key strategies and actions.

- b. Streamline back-of-house operations.** Offer an integrated suite of advancement services by combining operations with the IU Foundation and other appropriate organizations.
 - i. Seek efficiencies in administrative and financial operations between IUAA and IUF wherever possible.
 - ii. Establish a strategic plan for the Advancement Data and Information Technology department.
 - iii. Establish an annual-giving and alumni-membership strategy and annual-operating plan to boost overall annual giving and generate revenue for alumni involvement and scholarship programs.

- c. Develop resources to support alumni involvement and enrichment priorities.** Maximize existing revenue sources and create new ones to support alumni involvement and institutional advancement priorities.
 - i. Develop an event program-pricing and cost-management strategy based on analysis of alumni financial capacity and prevailing costs/rates for comparable programs and experiences in key geographic markets.
 - ii. Assess all affinity programs and alumni-service offerings, modifying and creating new partnerships based on analysis of peer and competitor offerings; alumni perceptions of price, value, and relevance; as well as potential revenue.
 - iii. Develop and implement a partnership strategy to generate sponsorship revenue, co-brand enrichment experiences, and share program costs with appropriate companies, groups, organizations, and units.
 - iv. Develop and implement a sustaining-life-membership program.
 - v. Work with the IU Foundation and key units to identify special membership societies and entry-level giving-circle opportunities that cultivate a culture of both service and giving by recent graduates and other identifiable peer groups with a propensity to engage in these unique membership and giving experiences.

- d. Maximize benefits of technology.** Develop a rigorous program of data analysis and management to target prospects and manage alumni involvement.
 - i. Ensure that the IU Lifetime Involvement Initiative and Enterprise Advancement System specifically address IUAA requirements for event management and registration, membership and volunteer management, and annual giving.
 - ii. Harmonize key data management terms, policies, and practices with the IU Foundation.
 - iii. Create self-managed online reporting processes and competitions to track and reward alumni involvement.

- e. Foster a climate that treats all people with integrity, dignity, and respect.** Construct a clear and concise statement of ethical expectations based on the best practices of corporations and organizations recognized for exemplary policies concerning the treatment of employees, volunteers, and others.
 - i. Develop an IUAA Statement of Ethical Principles and Code of Conduct.
 - ii. Create three professional-enrichment experiences: one to foster understanding of the importance of diversity; one designed to address careful communication; one focused on NCAA Division I athletics compliance issues.
 - iii. Ensure 100 percent staff participation with organizational compliance training required by IU and IUF.

IU Alumni Association Values

The Indiana University Alumni Association enhances commitments by IU to its alumni, by the alumni to the university, and among alumni to each other. We build a diverse and global network of committed volunteers who share a sense of pride, purpose, and promise about Indiana University.

As a community of staff and volunteers, we value:

- Commitment to IUAA's mission and goals
- Dedication to the greater good of Indiana University and its graduates
- Respect for the worth and dignity of individuals
- Accountability to the public, university, and each other
- Openness and responsible stewardship of time, talent, and resources
- Personal warmth, hospitality, and fun.



Institutional authority and scope

These are foundational decisions that dictate the conduct of alumni relations at Indiana University:

- 1) The strategic direction of Indiana University and its alumni-relations priorities ultimately are determined by the president and trustees of Indiana University.
- 2) The IU Alumni Association exists to serve and support Indiana University and alumni of all campuses, schools, and degree-granting programs.
- 3) The executive director of the IU Alumni Association is Indiana University's chief alumni-relations officer and the chief executive officer of the IU Alumni Association, reporting to the president of Indiana University through the president of the Indiana University Foundation.
- 4) The IUAA Board of Managers is the governing board of the IU Alumni Association, a nonprofit corporation chartered in Indiana.

Planning Assumptions

These are key environmental factors affecting membership, giving, and engagement over which IU and IUAA have little or no control:

- 1) Economic conditions and indicators that affect volunteer engagement and membership
- 2) Financial and other pressures on Indiana University that will further increase the importance of alumni engagement
- 3) Demographic changes in the alumni and prospective donor populations
- 4) Social and cultural changes, especially related to volunteer engagement patterns and philanthropic activity.



**INDIANA UNIVERSITY
ALUMNI ASSOCIATION**