INDIANA UNIVERSITY
ALUMNI ASSOCIATION

Five-Year Plan

2015–2020

Adopted on November 13, 2015

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Dear 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 your 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, especially in the potential alumni have for supporting one another and IU in making a better world.

Based on input from a variety of stakeholder groups and individual feedback from the many constituencies served by the IU Alumni Association, this plan is a working document that will be reviewed regularly and revised annually by the IUAA Board of Managers and executive leadership.

For our beloved alma mater,

J Thomas Forbes
Chief Executive Officer

Barbara Popp
Board of Managers Chairwoman, 2015-16

Our Vision

Indiana University alumni are a powerful global network supporting their alma mater and one another throughout their lives.

Our Mission

The Indiana University Alumni Association brings alumni together to support IU and one another throughout their lives.

Our Values

There are four core behaviors that drive our success:

- **Collaboration.** We actively connect groups and individuals who are mutually accountable for achieving shared goals and outcomes.

- **Commitment.** We consistently follow through on what we say we will do.

- **Inclusion.** We intentionally embrace a broad range of unique people and perspectives, treating all with dignity and respect.

- **Pride.** We genuinely share the spirit of IU in all our communications and interactions.

Core Priorities

- **Make involvement easier.** Our approach needs to reflect the evolving ways that alumni relate to IU and one another. IUAA will lead initiatives so that alumni are informed, involved, and invested in IU.

- **Personalize the alumni experience.** No two alumni are alike. IUAA will lead initiatives to personalize experiences to build lasting relationships of mutual benefit.

- **Empower our staff and volunteers.** Our volunteers and staff expect help connecting alumni. IUAA will lead initiatives to help attract and retain a powerful global alumni volunteer network serving one another and Indiana University.

Core Priorities & Strategies

1. **Make involvement easier.** IUAA will lead initiatives so that alumni are informed, involved, and invested in IU, with particular focus on digital and mobile applications of technology.

   1.1. **Make it easier to be a member.**

   1.1.1. Consider a new form of membership. Explore the feasibility and impact of creating a category of opt-in membership for all who identify as IU alumni to expand the base of qualified prospects for increased IU giving and involvement.

   1.1.2. Make paying dues as easy as making a gift. Establish an auto-renewal/automatic payment functionality to make it easier and more convenient for alumni to renew their membership dues.

   1.2. **Make it easier to access connections, content, and programming.** Develop content, delivery mechanisms, and solutions to help alumni stay connected to IU and one another. Track effectiveness and develop content marketing strategies to drive consumption.

   1.2.1. Create and deliver relevant content and programming to alumni in a convenient and ever-present way.

   1.2.2. Implement systems to deliver content and programming to alumni in ways that are accessible on devices and screens of all sizes.

   1.3. **Make connecting easier.** Collaborate with the IU Foundation and IU partners to conduct regular audits and reviews of business and technology processes, systems, and technology to ensure we continuously make it easier for alumni to be involved with IU and for IU alumni relations staff to report on alumni engagement.

   1.3.1. Collaborate to present an annual season of signature events across IU and its alumni communities. Work with IU partners and alumni groups to plan and present an annual series of signature alumni events throughout the university that can be announced and promoted at the beginning of the academic year.

   1.3.2. Enhance event management systems and improvement based on participant feedback and follow-up. Work with the IU Foundation and IU partners to offer a user-friendly registration and payment system for both online and on-location events that also can track participation and enable the use of the Net Promoter System[1] to survey participants to improve event experience and facilitate follow up.

   1.3.3. Make CRIMSON even better. Take actions to address current gaps in the Crimson alumni/donor system (event management and registration, volunteer management, annual giving for alumni initiatives, etc.).

   1.3.4. Make it easier for alumni to manage their IU interactions. Allow alumni to record their interests, needs, and preferences related to their engagement to provide

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[1] The Net Promoter System measures the willingness of customers to recommend a company's products or services to others. It is used as a proxy for gauging the customer's overall satisfaction with a company's product or service and the customer's loyalty to the brand. The IU Alumni Association, as well as Cornell, Stanford, and other notable institutions, have been using this method for program assessment for several years.

actionable intelligence that can help enhance alumni giving and engagement efforts.

1.3.5. Make it easier for IU units to manage, measure, and track alumni involvement. Work with the IU Foundation to develop and implement institution-wide methods, systems, and tools to track alumni giving and involvement.

1.4. **Make involvement mobile.** Drawing on the capabilities identified from the stakeholder input sessions conducted for the IUAA Five-Year Plan, develop and implement technologies that work on devices and screens most likely to be used by alumni. Partner with firms and organizations with proven capabilities and solutions.

2. **Personalize the alumni experience.** IUAA will lead initiatives to personalize experiences to build lasting relationships of mutual benefit.

2.1. **Continue to align IUAA marketing and programming to alumni preferences and behavior.** Develop programs tailored to alumni habits, life stages, needs, and preferences. Continue to develop and use assessment and research methods such as the Net Promoter System for IUAA events and experiences. Develop a value proposition and measurable outcomes statement to help guide and inform the activities outlined below.

2.1.1. Adapt university advocacy and citizenship initiatives to increase awareness of university achievements, priorities, insights, and impact. Continue efforts to increase IU Trustee election voter participation and award the Talbot Scholarship.

2.1.2. Assess, develop, and sustain "tried and true" alumni engagement programs across all campuses such as Homecoming celebrations, IUPUI Regatta and Top 100, Mini University, Winter College, and specific "signature" programs identified by regional campus alumni directors.

2.1.3. Develop the alumni communities staff into market experts. Offer data, expertise, and facts that help IU alumni leaders and staff develop effective efforts to engage alumni.

2.1.4. Offer career coaching and networking opportunities to all IU alumni at key life stages. Present opportunities for alumni to serve as advisers, mentors, and presenters. Continue developing partnerships with campus and school career services to facilitate student-alumni career connections.

2.1.5. Provide customized and sophisticated alumni travel experiences that appeal to a wider alumni demographic to boost participation and foster sustainability. Provide customized, turnkey group travel services to campuses and schools. Present athletics-related travel experiences to alumni, with particular emphasis on destination and post-season tournament appearances.

2.1.6. Renew efforts to involve students and recent graduates. Drawing on insights of the Board of Aeons report[2] and best practices of the Student Alumni Associations (SAA) and IUPUI Student Organization for Alumni Relations (SOAR), collaborate with the IU Foundation and IU partners to engage students

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[2] Founded in 1921, the Board of Aeons is a 12-member student research and advisory organization on the IU Bloomington campus that works closely with the president of Indiana University. President Michael A. McRobbie typically selects juniors and seniors who have distinguished themselves through scholarship, leadership, and service to the university. In 2015, the Board worked on a project to investigate how IU could "utilize the collegiate experience to socialize current [IU Bloomington] students into becoming engaged alumni." The full report is available at: https://iu.box.com/aeonsreport2015.

and graduates of the last decade to build the pipeline of future IU alumni leaders and donors. Implement a plan to convert more opt-in members and SAA/SOAR leaders to higher levels of involvement leading to dues-paying membership.

    2.1.7. Support the IU Bicentennial. Identify and recommend alumni as advisers, presenters, and participants in events and programs. Develop and implement other initiatives as requested by the Office of the President. Update the history wall in the Inskeep Library in the DeVault Center to highlight the ways alumni have contributed to IU's two centuries of success. Look for opportunities to leverage the capital campaign.

2.2. **Enhance efforts to be even more inclusive.** Develop a value proposition and measurable outcomes statement to help guide and inform the activities outlined below.

    2.2.1. Attract and retain more diverse alumni talent with emphasis on increasing involvement of alumni of color, international, and GLBT[3] alumni. Develop a leadership program and enhance programming for these members of the IU alumni family. Devise engagement campaigns for these groups, aligned and jointly funded by relevant IU partners.

    2.2.2. Attract and retain more regional campus alumni. Continue collaborations with the IU Office of the Vice President for Regional Affairs, IUF Office of the Vice President for Regional Campus Development, chancellors, vice chancellors, and regional campus alumni directors to develop a strategic plan for increasing giving and involvement among graduates who attended IU regional campuses. Devise engagement and membership campaigns for these groups, aligned and jointly funded by relevant IU partners. Develop synergies across common programming like Homecoming, student engagement, and other overlapping areas.

    2.2.3. Attract, retain, and deepen the engagement of IUPUI alumni. Define desired outcomes for alumni relations and develop a five-year plan with staffing and budget to advance those priorities. Identify and align priorities with the IU Bicentennial strategic plan, IUPUI Strategic Plan, IUPUI Office of Community Engagement strategy, and IU Alumni Association five-year plan. Develop an evidence-based alumni engagement plan to embrace both IU and Purdue graduates of the campus and fulfill advancement goals of the institution, advocate for the values and principles of higher education engagement and economic development, and attract diverse, talented alumni, faculty, staff, and student populations for the future.

2.3. **Enhance the member experience.** Develop a value proposition and measurable outcomes statement to help guide and inform efforts to enhance member experiences, as measured by growth in membership and Net Promoter System scores. Implement a multi-year plan based on member feedback and quantifiable results. Review the plan, report results, and revise annually.

    2.3.1. Address data issues. Establish data collection and analysis processes to better understand and manage IUAA member interactions, interests, and behaviors.

    2.3.2. Gather input and test different, new approaches. Continue use of the Net Promoter System and specific research projects to gather feedback to achieve

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[3] GLBT is an abbreviation for gay, lesbian, bisexual, and transgender.

plan goals and metrics. Test different or new approaches before implementing major changes or initiatives.

    2.3.3.   Help IU units and campus partners. Partner with the IU Foundation to identify more new prospects for campus- and school-driven engagement and giving programs. Share effective practices and insights to help IUAA staff and volunteers personalize interactions with alumni.

3. **Empower our staff and volunteers.** IUAA will lead initiatives to help attract and retain a powerful global alumni volunteer network serving one another and Indiana University.

    3.1. **Align the work of all IU-chartered alumni groups**[4] with specific initiatives, projects, and tasks that support IU and IUAA needs and priorities. Share best practices with other IU units responsible for alumni engagement. Collaborate with IU chartered groups to develop appropriate metrics and systems for managing and rewarding their efforts.

    3.2. **Develop and reward staff performance, productivity, retention, and satisfaction.** Document and deliver programs to enhance staff retention, rewards, and succession plans. With Indiana University and IU Foundation human resources staff, devise programs to develop, recognize, and reward exemplary performance. Conduct consistent, regular surveys to assess staff satisfaction and organizational performance at developing staff. Report results regularly. Share strategies with the IU advancement and human resource community as time and resources permit.

    3.3. **Define and deliver a sustainable service model for all those served by IUAA.** Working collaboratively with the many entities served by IUAA, document and deliver on the terms and specifications for IUAA resources and services available to the entities it supports, including affiliate groups, constituent societies, and IUPUI and regional campus alumni relations offices. Develop strategies for self-organizing groups over time.

    3.4. **Help all IU units boost dues and donations** in concert with the IU Foundation and IU partners. Secure financial support for IUAA pilot projects to test new approaches and then scale up over time.

        3.4.1.   Collect and share information needed to boost dues and donations across the university. Share best practices and data to help IU units and alumni volunteers personalize the alumni experience in ways that increase paying dues and making gifts.

        3.4.2.   Enhance geographic outreach. Partner with the IU Foundation Regional Advancement Team, campuses, and selected units to implement specific alumni engagement campaigns for alumni and friends who seek involvement beyond giving.

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[4] IU-chartered alumni groups refer to all affiliate groups, campus- and school-based alumni boards, and geographically-based entities (ambassador groups, chapters, clubs, etc.) formally established in accordance with the IUAA bylaws.

3.4.3. Institutionalize the IUAA fundraising program. Building on current IUAA annual giving and past capital fundraising efforts, implement a formal, sustainable program of cultivation, stewardship, and solicitation of individuals interested in financially supporting alumni engagement. Prioritize initiatives that enhance IUAA's capacity to serve all alumni and support alumni engagement across all campuses.

3.4.4. Strengthen alumni scholarship efforts. Continue to work with Indiana University and the IU Foundation to increase applications and grow IUAA alumni scholarship funds, leveraging Bicentennial campaign matching opportunities. Develop and implement consistent policies and sustainable partnerships supporting scholarship fundraising. Identify and expand the best practices of our most successful scholarship efforts around the university. Communicate lessons learned and success stories.

3.4.5. Quantify and share the impact of alumni donor and volunteer support to Indiana University. Such behaviors might include: attending an IU athletics or arts event; buying IU merchandise; encouraging and referring qualified students to attend IU; hiring or encouraging the hiring of IU graduating students and alumni; making a gift to IU; or registering to receive regular information and updates from IU. Recommend individual and joint alumni engagement initiatives that IUAA and IUF can launch to boost dues and donations. Report and share results on a regular basis.

3.5. **Renew efforts to create an even more effective and reliable staff and volunteer effort.** Develop a value proposition and measurable outcomes statement to help guide and inform the activities outlined below.

3.5.1. Build alumni volunteer training programs to strengthen the volunteer experience and performance. Beginning with IUAA and expanding over time, identify and present more task-oriented and outcome-focused volunteer opportunities. Develop appropriate online and on-location training programs for both staff and volunteers. Track participation and expand use of the Net Promoter System to gather feedback.

3.5.2. Collect and share information needed to strengthen the alumni volunteer experience across IU. Share best practices and data to help IU units and alumni volunteers personalize the alumni experience.

3.5.3. Continue IUAA board and committee development and related activities that meaningfully engage the members of the Board of Managers, Executive Council, Finance Committee, Governance Committee, Past Chairs Council, and related entities.

3.5.4. Develop a cadre of experienced IU alumni leaders to serve as mentors working with the IUAA Alumni Communities Department to help develop the growing network of alumni leaders.

3.5.5. Make it easier for alumni leaders to manage and mobilize alumni. Establish and maintain a reliable online knowledge base of available tools, FAQs, and resources for staff and volunteers to find information about best practices, effective ways to personalize and simplify alumni involvement, and related competencies. Consistently update it with relevant information and communicate it to core staff and volunteers. Ensure all this is accessible on devices and screens of all sizes. Design with self-organizing groups in mind. Track usage and reward those who take advantage of these resources.

3.5.6. Recognize and reward high-performing groups and individuals. Re-establish a simplified program for recognizing and rewarding IU-chartered groups for

effectiveness and impact at engaging alumni. Strengthen individual recognition programs for exemplary alumni volunteers.

Outcome Measures

The Indiana University Alumni Association will develop concise metrics and a simple dashboard for assessing progress on this plan, beginning with what it directly controls and then expanding the scope and complexity of these metrics and dashboard report on the following indicators:

- **Participation**, as measured by event attendance and membership;

- **Revenue**, as measured by income related to donations, dues, events, and all other sources.

- **Satisfaction**, as measured by surveying event participants and members.