

# SEAMILESS INTEGRATION

By MAURA KING SCULLY

## Alumni associations move to align programming with their institution's strategic plan

Call it the “Groundhog Day Effect.” It’s that feeling in alumni relations that once you complete a big event, it’s time to start planning it all over again.

In this Bill Murray–esque cycle, it’s easy to get trapped on the treadmill of event-event-event without taking time to stop moving and reflect. What are all of these events accomplishing? It’s a question that has led alumni organizations small and large to engage in strategic planning to figure out the overall alumni relations goals and the programming that can help achieve those goals.

But that strategic departmental approach alone isn’t enough anymore. Increasingly, there’s a growing realization in alumni relations that successful alumni programs, benefits, and services are not ends in and of themselves. Rather, alumni engagement is ultimately all about the institution. Success in alumni relations ideally advances an institution’s overall forward progress.

### IN LOCK STEP

Twenty years ago, alumni strategic plans were unusual, but they have slowly become much more mainstream. The next step in this organizational evolution is going

on now: a strategic plan that aligns the alumni association’s goals with the institution’s goals.

For Nazareth College in New York, the shift came five years ago with the arrival of a new president who “challenged each division to develop its own strategic plan supporting the college’s plan,” explains Kerry Gotham, director of alumni relations. “The directors from each area in our division—development, marketing, alumni, campaign and corporate, and government relations—sat down to develop a plan. Now we revisit it every year to write annual goals and objectives flowing from that strategic plan. It’s really helped us see the forest for the trees,” Gotham continues. “Everyone can see how they—and everyone else—fits in. In alumni relations, it’s made us more mindful of the types of programs we do, how we’re spending our time, and the return on investment for the college.”

Similar to Nazareth, institutional transition brought alumni planning and programming changes at Canada’s Wilfrid Laurier University. The alumni office developed an integrated plan in February 2009 when the director of alumni left the university just as the alumni board’s five-year plan was reaching its end.

“The alumni association is separately incorporated and used to have its own strategic plan, separate from alumni relations,” explains Roly Webster, acting director of alumni relations. “At that time, we decided it just made sense to develop one integrated strategic plan for both.”

Webster reports that it’s been a success. “When I talk to other alumni directors, they can’t believe how collaborative we are. It’s an open book both ways: The board knows what our needs are in alumni relations, and we know where they stand.”

At the University of Minnesota Alumni Association, the need for a coherent strategy was driven by a watershed moment: the desire to build a new alumni center at the Minneapolis campus. The association hired a strategic planning consultant who helped survey alumni and conducted in-depth, in-person interviews with 100 campus stakeholders. “What we learned from that process was that more than anything, alumni wanted to be engaged in a mutually beneficial relationship with the university,” says Bruce Rader, senior director of marketing and outreach. “That’s when we decided to develop an integrated strategic plan.”

**LEADING THE WAY**

Sometimes it's alumni themselves who are clamoring for strategic change, which was the case at Lynchburg College in Virginia. "In 2005, the alumni board approached the college president, telling him they wanted to help strategically advance the college," explains Allison J. Datz, assistant director of alumni programs. "The president commissioned a blue-ribbon panel to look at best practices across the country and then make recommendations."

As a result, alumni engagement figures prominently in the college's 2008 strategic plan: Goal six of the seven-point plan is to "increase alumni participation in the life of the College."

At Pepperdine University in California, Executive Director of Alumni Affairs Catherine Kort says that a comprehensive alumni survey drove the alumni board to dissolve itself and reform as a new strategic entity. "The survey's results gave clear indicators that alumni wanted more from us, and we currently weren't providing it," she explains. "The board established criteria they felt they needed to be successful. And they agreed that, as currently configured, they weren't going to be able to move quickly enough." In short order, over a period of a few months, they disbanded and established an alumni leadership council, which, from its inception, was integrated with the university's objectives. "This was possible through the cooperation of the original board's executive committee, an

independent task force, and a transition team representing the blending of the two."

Such a move, while radical, was successful because it came from the bottom up. In that way, Pepperdine's experience is similar to the University of Warwick's: Three years ago, the U.K. institution switched from a membership association to an all-alumni association.

"The appetite for change came from alumni themselves," says Ian Rowley, director of development, communications, and strategy. "The alumni organization approached the vice chancellor and said, 'We think we've become more peripheral. We want to be more central to your new strategy.'" So the alumni association made a major shift, realized through a process of long conversations over a series of months. "Some were concerned about change moving too quickly and about losing some things. And it's true that in the examination of events, some people lost a connection that they once enjoyed. But the one powerful thing going for us from the outset was that the push for change came from the alumni organization itself. Certainly, there were a few casualties, but the alumni group that was the architect of that change stayed with it through the difficult times."

**MAKING A LIST**

So how do you start to restructure existing alumni programs and imagine new ones—all with an eye to strategic alignment with the institution? Many

who've done it advise developing a list of criteria of what makes a program successful.

"In the course of our strategic planning, we came up with four general criteria for alumni programs," says Nazareth's Gotham. "First, [the program] has to maximize alumni impact, meaning it benefits alumni, benefits Nazareth, and furthers the institution. Second, it has to offer personal and professional networking. Third, it must advance a culture of giving and support; and fourth, wherever possible, [it has to] involve students in our quest to educate them about the importance of lifelong engagement." Establishing a baseline for successful programs forced Gotham and his team to "take a hard look at how programs, communication, and events fit back into those general objectives."

Rader describes a four-criterion list that Minnesota alumni programs must meet. "It must help us advance the cause of the university, generate support from the legislature, provide a unique benefit or service, or create awareness of the alumni association's special role," he explains. A particular benefit, service, or event need not satisfy all criteria, but the more it does, the stronger the program.

Donna Thornton, vice president for alumni relations at Rutgers, The State University of New Jersey, used a similar process in creating one central alumni board from 19 separate school-based bodies. "The first thing we did was identify our core functions. We



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decided that those were awards and recognition; reunion and homecoming; chartered organizations (affinity groups); educational programming; and communications, benefits, and services. Based on those core functions, we prioritized programming, looking at how many alumni are we serving. What's the cost? What's the intrinsic benefit? Did it influence alumni actions: Did they make a gift, wear a Rutgers T-shirt, advocate to a legislator?"

**PROGRAMMING WITH A KNIFE**

Of course, when you use strategic criteria to examine programming, some staff- and volunteer-beloved programs won't make the cut. For Gotham, it was Nazareth's annual holiday brunch. "We had about 75 people for the event every year. It was the same people year in and year out," he says. When alumni relations opted to put time and energy elsewhere, brunch time approached and the brunch didn't happen. "Some folks grumbled," he says. Staff fielded a

**in short**

**DATA TRUMPS GUT.** When the strategic planning process reveals that certain staff-beloved events are no longer meeting institutional objectives, it can be tantalizingly easy to keep those events off the chopping block using personal experience and intuition as the rationale. While *Blink* author Malcolm Gladwell might argue the benefits of leading via intuition, in a paper titled *Role of Intuition in Strategic Decision Making*, researchers from Singapore's Nanyang Business School reported that after interviewing U.S. managers in the utility, banking, and computer industries, "use of intuitive synthesis was found to be positively related to organizational performance in an unstable environment, but negatively related to it in a stable environment."

**QUALITY QUERYING.** One part of effective strategic planning is ensuring that you know what alumni want from the association. There's no better way to find out than straight from the horses' mouths, and administering your own alumni survey has never been easier. But that doesn't mean you are doing it right. Find out how to phrase, construct, and sequence questions by reading "How to Write an Effective Survey Questionnaire" at the MarketingProfs site ([www.marketingprofs.com](http://www.marketingprofs.com)). "It takes very little thought to write out a bunch of questions on a piece of paper and call it a questionnaire," writes marketing research pro Robert Kaden. "It takes considerable thought to write questions that are good ones and produce a meaningful questionnaire."

**TENDING TO THE TEAM.** Strategic planning in a downturn can lay bare the tough budget realities. In this environment, alumni leaders are wise not to ignore employee morale. Leaders looking for inspiration should check out the Q&A between Harvard Business School Professor Michael Beer and Martha Lagace, senior editor of the *HBS Working Knowledge* newsletter. Beer has studied leaders who have built a high-commitment, high-performance (HCHP) workforce. He says, "CEOs of HCHP companies think very differently about their employees. They see them as an asset, and care about them as people and work hard to frame the mission of the firm in a way that creates meaning. Consequently they manage downturns very differently." Read the interview at [hbswk.hbs.edu/item/6108.html](http://hbswk.hbs.edu/item/6108.html).

**BOARD SERVICE 101.** For some alumni leaders, strategic planning involves the alumni board; maintaining a good working relationship with this group is critical. Many alumni associations offer board member training sessions so that they understand their roles and duties. Through the Board Fellows program at Stanford University's Graduate School of Business, students are receiving training on a broader level for future nonprofit board service. Those accepted as fellows serve as a nonvoting board member with a San Francisco Bay Area nonprofit organization for six months during the school year. In addition to receiving guidance from a mentor at the host organization, the school offers training workshops and networking opportunities with current and past fellows.



handful of complaining phone calls. “We listened and told them we appreciated their feedback. Nine times out of 10, it died there. We were fortunate that many of the attendees were already good volunteers who understood that we were moving in a different direction with our time and resources, and [they] were able to help spread the word.”

Wilfrid Laurier’s “Backpack to Briefcase” program ended up on the chopping block after the strategic overhaul, at least from an alumni programming perspective. “It’s a student program focusing on the soft side of the job search: etiquette, dressing for success, networking. We tried to use it to brand ourselves to students,” says Webster. But it was also extraordinarily time-intensive. “Our director had just left, we were down another staff member, and [we] decided we had to find a different way to cut the pie. We now hope to partner with the student leadership center on campus to continue to deliver these valuable programs.”

Alumni staff members initially balked at the change. “Two in particular had grown the program and were very invested in and passionate about it,” he says. “But when we sat down to do strategic planning as a staff, realization dawned that we couldn’t just do things because we did them last year.” Involving staff members in that planning and making tough choices “brings more collaboration, more buy-in,” Webster says.

After its strategic alliance, Rutgers continued offering its annual alumni regional club leadership conference, but the alumni association stopped paying for volunteers’ hotel rooms. “We shifted the focus from the university providing that to the volunteers. We want alumni leaders to participate because of their pride in Rutgers, not because they’re getting a free hotel room,” says Thornton. “So now, they pay their overnight expenses, and we give them a worthwhile experience. It was disappointing to those who considered it a reward for being an active volunteer. But I

think that everyone understood the financial realities forcing the decision.”

Pepperdine’s new strategic alumni focus meant reinventing a 20-year-old staple event: a gathering of graduates at the Hollywood Bowl, an iconic entertainment venue in Los Angeles.

“It was an event that had outlasted its tradition. It just didn’t have the same draw anymore,” Kort observes. “We’re now in the process of bringing it back to campus to a park that overlooks the Pacific as part of homecoming weekend.”

Another cross-off was a labor-intensive alumni speakers network, in which alumni volunteers would go into classrooms to talk to students about staying involved once they graduated. “It wasn’t easy to make that a positive experience,” says Kort. “It was difficult coordinating with faculty to make time in their classes, and then often hard for alumni volunteers to engage students once they were in the class. For this, they’d have to take a half day out of work. In the end, when the council sat down to evaluate programs, they decided it wasn’t the best use of their time. Luckily, the volunteer who was most excited about this program was on the committee making the decision, and she had witnessed the program’s limitations firsthand.”

#### **SINK OR SWIM?**

Sometimes, the decision to eliminate a program in the name of strategic alliance is easy, and clear criteria certainly help. Particularly with new ventures, however, programs need time to develop before judging their worth. Just how much time? “Three years,” says Kort, echoing the sentiments of many. “It takes a year to get a program up and implemented. In year two, you tweak it. By year three, you know for sure if it’s working or not.”

Like any rule of thumb, however, there are exceptions. Rader reports that Minnesota pre-emptively

canceled a program before it flopped. “We have a big homecoming parade every year and decided to add a pre-parade event from 3 p.m. to 6 p.m.” The alumni staff lined up high-profile ex-athletes to attend and sign autographs, ordered food and beverages, marketed the event, and then waited for registrations to come in. They didn’t. At least not in the numbers they hoped they would. “We realized the error of our ways, scheduling a family event when kids were still in school,” he says. “So we pulled the plug.”

Even if reconfiguring a staple event is the right decision, the first iteration might not be a smashing success. “Good things will always refresh themselves organically and improve over time,” observes Rowley, “but we have to be quite nimble in how we respond to new ventures.”

Warwick is now grappling with a test of that flexibility. “We used to have 10 reunion dinners each year, one for each class celebrating a milestone year. But we were faced with declining attendance.” The

university shifted to one all-alumni weekend instead, which was successful in terms of overall numbers of alumni returning, but not in its appeal to milestone-year alumni. “Those alumni didn’t feel there was necessarily enough of a special calling for them,” he says.

“We’re still reflecting on that and what to do about it. But you need to be pragmatic about these things. We won’t hit the bull’s-eye every time, and we can’t be defensive about it.”

Wise words to keep in mind as alumni professionals enter a new era of integrated strategic planning. ■

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