Strategic Planning Report

for

Wichita State University Alumni Association

June 23, 2016

WSU Alumni Association Strategic Planning Report

Summary

This planning report includes the strategic goals of the Wichita State University Alumni Association for the next eighteen to twenty-four months:
1. Increase member engagement by creating opportunities to "give back"
2. Increase member engagement through events
3. Increase member engagement by creating or restoring chapters and societies
4. Enhance marketing and communication
5. Prepare organizational infrastructure for sustainability and future development

These goals specifically reflect and support five of the University's stated values: seizing opportunities, success for all stakeholders, adaptive approaches, teamwork, and positive risk-taking.

Three dashboard measures will be continually assessed to monitor progress:
- Total membership
- Rate of membership retention
- Number and percentage of active/participating members

History and Mission

The mission of Wichita State University is to be an essential educational, cultural and economic driver for Kansas and the greater public good.

Founded in 1913, the Wichita State University Alumni Association is the oldest and largest support organization for WSU. The primary intent of the partnership between the association and the university is to help ensure the continued excellence of Wichita State.

It is the belief of the Alumni Association that fulfilling the University mission requires a dedicated core of alumni and friends supporting and promoting the brand and the essential functions of the University. These enthusiastic, committed alumni undergird the university with financial support and personal attention. Members maintain and grow their connection to the University over their lifetimes.

The Association's message is that belonging to and participating in the WSU Alumni Association is the best way to support the University you love.

Planning Process and How This Plan Will Be Used

This strategic plan was developed through several steps:
- Review of past documents
- Two design team meetings including staff members, executive committee members, and an industry consultant to identify preferred approaches and key questions
- Two focus groups and a survey to better understand knowledge, beliefs, and attitudes of alumni
- A board of directors planning retreat to identify high-level objectives as well as brainstorm options for implementation
- Two next-level meetings of key staff members and board representatives to distill high-level objectives into target areas
- Two writing meetings with key staff members to create this planning document

Every focus area in this plan is connected to specific values and/or goals espoused in the University strategic plan.

Following any requested modification of the plan and final adoption by the Board of Directors, Association staff will take the lead in identifying tactics and action steps necessary to achieve the goals in this plan. The Director will be responsible for updating the Board on progress related to the plan, including the need to modify or reframe the plan over time to reflect new developments and opportunities.

Goals

Goal 1: Increase Member Engagement by Creating Opportunities to 'Give Back'

Our alumni and friends are grateful for what the University has provided them and is providing the community. They seek opportunities to give back to or on behalf of the University. These acts of giving back strengthen the bond alumni have with the University and also engage new Shockers and community members who benefit. These acts may also increase the professional network of alumni and current students. This goal reflects the University value of success for all stakeholders. It also may connect with University Goal 5—Empower students to create a campus culture and experience that meets their changing needs.

Goal 1 success will be measured by:

➢ Scholarships created and awarded
➢ Volunteer opportunities created and promoted
➢ Members report feeling connected and appreciated

Strategies to Achieve Goal #1

A. Create a marketing plan to promote current scholarships
    a. Emphasize that established scholarships are an easy, effective way to give
        i. Drive Your Pride
    b. Educate alumni and students about the difference among scholarships
B. Create opportunities for additional endowed funding toward scholarships
C. Increase number of applicants for Alumni Association scholarships
D. Identify volunteer opportunities that appeal to "average Shockers" who want to help the University and the community
E. Work with University entities to connect potential students, current students, alumni, and friends
    a. Institute corporate receptions
    b. Work with Admissions
    c. Work with Career Development
    d. Be responsive to Shockers For Higher Education

Goal 2: Increase Member Engagement Through Events

The WSU Alumni Association is rightfully well known for its events, several of which are annual traditions members expect at certain times of year. In order to amplify the strategic benefits of these events, the Association must continue to modify existing events for optimal impact. Association staff and board members will use events as opportunities to better know alumni beyond a superficial, "name tag" level, which includes sharing prospect information with the WSU Foundation. Successful events will inspire participants to become members and inspire members to become active. Events may also help members identify new ways to engage with or through the University. This goal is primarily the responsibility of the Programs Department. Achieving this goal will require adherence to the University value for positive risk-taking. It may also connect with University Goal #6—Be a campus that reflects—in staff, faculty and students—the evolving diversity of society.

Goal 2 success will be measured by:

➢ Event Participation
➢ Repeat attendance
➢ Number of participants using the member discount for events
➢ Collecting current contact information
➢ "Feel good factor"—Participants report feeling a sense of community

Strategies to Achieve Goal #2

A. Evaluate events and their effectiveness based on costs, participation, and other relevant criteria. (If we are going to do an event that costs us money, do it intentionally.)
   a. Review events that were successful in the past
B. Consider target audiences when planning our events
   a. Current students
   b. People who prefer family friendly
   c. Young alumni
C. Consider partnerships to expand slate of events available to members
   a. Boutique events (examples might include Chamber, Final Friday, Shift Space, Ulrich, Zoo)
   b. Opportunities that leverage expertise in the University (examples might include lectures, archaeology trips, continuing education)
D. Share information with WSU Foundation and Admissions
   a. Use Raiser's Edge (see Infrastructure goal)

Goal 3: Increase Member Engagement by Creating or Restoring Chapters and Societies

This goal reflects the University value of <u>seizing opportunities</u>. Our alumni are in major urban areas, and our Association in the recent past has failed to seize the opportunity to capitalize on that. This goal includes the opportunity to provide structure and expectations for cities where there is alumni activity. By defining chapter and spirit groups and finding key volunteers, the Association will increase support for the University from high-potential cities. This goal also will help the Association better code alumni records, leading to more effective connection in the future. Last but not least, this goal recognizes the strong WSU Men's Basketball brand and the need to seize the opportunities that stem from Shocker success on the national stage.

Goal 3 success will be measured by:

➢ Having a structured platform for chapters
➢ New networking, mentoring and recruiting opportunities
➢ Creating ways to recognize alumni for their professional achievements
➢ Knowing who alumni are (the "Dallas test")

Strategies to Achieve Goal #3

A. Create tools for successful Chapters and Spirit Groups
   a. Provide suggestions for Spirit Groups (for example, locations, accessibility, hospitality)
      i. Support and educate hosts
   b. Complete and distribute Chapter handbook
B. Identify key locations for Chapters to support the University based on numbers of alumni and potential donors
   a. Chicago
   b. Dallas
   c. Phoenix
   d. Kansas City
   e. Others?
C. Chapters move toward self-sufficiency
D. Research the history of campus societies and what is still happening
   a. Meet with Deans and learn what support they desire
   b. Establish guidelines that encourage consistency and self-sufficiency

Goal 4: Enhance Marketing and Communication

In many ways, the work represented by this strategic goal is at the heart of the Association. Marketing and communication efforts connect to the University value of <u>adaptive approaches</u>; they require the Association to embark on a series of smart experiments to diversify and improve communication with alumni and the community. This means building on efforts that have been successful in the past while continually evaluating their effectiveness and learning from results. This adaptive work requires the engagement of multiple stakeholders and must take into consideration their diverse points of view. The Association recognizes a strong connection between our messaging and our membership growth rate.

Goal 4 success will be measured by:

➢ Increased membership
➢ Higher ratio of positive online engagement (alumni providing updates, likes) to negative online engagement (alumni unsubscribe requests)
➢ Awareness of key programs, services the Association provides
➢ Other University and community entities participating in sharing a small number of key messages (e.g., Drive Your Pride scholarships)

Strategies to Achieve Goal #4

A. Investigate ways to harness technology to further customize communications.
   a. Look for ways to customize what the Association sends out.
   b. Look for opportunities that allow members to customize what they get, when, and in what formats.
   c. Test alternatives such as smaller bursts of information and alternate templates.
B. Implement a versatile web and content platform that is proven effective in similar organizations
   a. Continue to refresh the look of Association communications and marketing
   b. Fully use options provided such as event registration, directories, networking supports, and job searches.
   c. Integrate email and e-newsletter communication.
C. Develop and implement a marketing plan to promote the Association and the value of participation.
D. Position the Association as the keeper of alumni history—and teach that history to new generations of Shockers.
E. Develop and promote bold goals that demonstrate participation.
   a. Create a short-term Show Your Pride or Day of Giving style campaign.
   b. View these participation goals as a pathway to membership.

Goal 5: Prepare Organizational Infrastructure for Sustainability and Future Development

Infrastructure and internal processes are necessary to achieve the Association's strategic goals, and they also represent a goal unto themselves. The strategies outlined in this section undergird the work of the Association in the next two years and also represent the importance of designing and testing new approaches that may become future strategies. Within the infrastructure goals, as in the rest of the Association's work, it is important to balance the pragmatic need for steady, adequate revenue with the harder to measure need for cementing the bond between the University and its alumni. This goal area reflects the University value for <u>teamwork</u>, as achieving it will require the concerted and coordinated efforts of staff, board, members, partners, and University societies.

Strategies to Achieve Goal #5

    A. Increase undesignated/operational revenue that benefits the Association
- a. Increase passive revenue
  - i. Promote current affinity partnerships
    1. Financial and insurance products
    2. Exclusive merchandise
    3. Travel opportunities
  - ii. Identify new affinity partnerships

    B. Improve the accessibility and usefulness of data in our database
- a. Increase functionality by implementing an industry standard product
- b. Improve quality of the information we collect and house in the database

    C. Provide useful reports to other University entities.

    D. Evaluate new events and their revenue potential (examples might include Spartan Race, Affinity Group/College Reunion, All-University Open House)

    E. Evaluate membership pricing
- a. Create marketing plan to reflect updates

    F. Expand opportunities associated with Heritage Fund
- a. Increase number of touches
- b. Further vary ways of engaging alumni

Appendices

Reports from the Center for Applied Research and Evaluation
- Focus Group Report
- Young Alumni Data Report
- Kansas City Alumni Survey Report

Reports from Alumni Association meetings

December 7, 2015 Strategic Planning Retreat
- Strategic Planning Retreat Notes – Notes captured by Alumni Association staff during the event
- Strategic Planning Board and Staff Session December 2015 – notes transcribed from discussion flipcharts by Alumni Association staff

April 14 and 18, 2016 Staff and Executive Committee Planning Meetings
- WSUAA Executive Committee Planning Worksheet

Want to know more about this report? Contact Seth Bate at seth.bate@wichita.edu