

University of San Diego Alumni Association
Strategic Plan
Established July 2010 (Revised January 2012)

Executive Summary

The USD Alumni Association began a strategic planning process in 2010 to chart the future course of the organization over the next five years through June 30, 2015. This strategic plan outlines a new way of thinking, organizing and measuring success for the Alumni Association that will better meet the needs of the alumni and the University. A key tenet of the strategic plan is that the USD Alumni Association is primarily charged with engaging alumni and building relationships. Subsequently, alumni support will result. This does not mean the Alumni Association will shy away from its fundraising goals and efforts to increase the alumni-giving rate, but it will focus its core activities on building relationships between alumni and the University. It should be understood that support is not only meant to be financial but also volunteer support in its many facets. An additional byproduct of these stronger relationships will be improved brand growth and international visibility and recognition for USD embodied through the alumni themselves. Readers of this plan may notice an emphasis on undergraduates but we fully intend to develop and include graduate alumni in this plan. This strategic plan is intended to be a fluid, living document that will be updated on an annual basis.

Five core themes emerge from the Alumni Association strategic plan:

1. The Alumni Association will move from a “one-size-fits-all” engagement strategy to a “targeted and segmented” engagement strategy. The strategic plan calls for distinguishing alumni into “alumni group segments” and looks at its offerings more as “engagement tactics, strategies and services.”
2. The University of San Diego will embrace an alumni-inclusive perspective. True transformational change will only happen once alumni relations is the work of the entire USD community as opposed to the sole efforts of the Alumni Association and Office of Alumni Relations.
3. The Alumni Association will become a volunteer-driven organization where volunteers are encouraged and empowered to build and manage their own programs. As it has been suggested, we need to work with alumni, not for alumni.
4. The Alumni Association and USD will become more relevant in the lives of alumni through targeted communication and programs that resonate with alumni.
5. The Alumni Association will measure success through a series of targeted benchmarks to monitor its progress. An alumni engagement dashboard will be developed to measure progress on a monthly basis and an Annual Report will publish our results to the entire USD community.

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Mission and Vision

Mission Statement:

“To connect, engage and involve alumni with the University of San Diego, and with one another, in support of the University’s mission and goals as a Roman Catholic institution.”

Our mission is simple and clear: to build effective communication vehicles, programs and events that build strong and lasting relationships between alumni and their alma mater.

Vision Statements:

- We envision an alumni body – undergraduate and graduate - that is a connected and proud group who raise the brand of USD to high levels and who continues to support the its mission of service and Catholic education.
- We envision an alumni body that is excited about having graduated from USD. They support each other, cheer for each other, and support the University financially, spiritually, and intellectually.
- We envision that prospective students will choose USD because of the strength and vibrancy of its alumni network.
- We envision a transformed USD community that instinctively expects alumni involvement in all facets of campus life.

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Alumni Association SWOT Analysis

The following analysis represents a snapshot of the current climate and internal and external factors facing the USD Alumni Association.

Strengths:

- USD's increasing national visibility, rankings and athletic success
- Good data on alumni (90%+ of mailing addresses and 60% of email addresses)
- Strong alumni leadership team
- Solid infrastructure with core programs established (regional programs, student-alumni programs, scholarships, Homecoming Weekend, USD Wine Classic, Alumni Mass, etc.)
- Campus climate open to partnership and collaboration
- Philanthropic and service-oriented alumni base
- Overwhelming majority of alumni had a positive student experience and maintain a positive attitude towards USD

Weaknesses:

- One-size-fits-all outreach, engagement and solicitations
- Lack of class identity among students and alumni
- Engagement and giving rate is low
- No strong alumni brand other than USD
- Lack of culture of giving directed towards USD among students and alumni
- Lack of visibility and messaging in largest alumni publication – USD magazine

Opportunities:

- Usage of social media to engage and communicate with alumni and students
- New lifetime Gmail accounts for students to increase good email addresses for alumni
- Train students to be actively engaged alumni while still on campus
- Increasing competition for students over next decade will provide opportunity for alumni to play a major role in student recruitment, retention and yield
- Increasing expectations from alumni that alma mater will help them in their career development
- Untapped potential of affinity group programming
- Shed events and programs that are not having an impact on strategic goals

Threats:

- University budgets and lack of resources
- Information and media overload on our students and alumni
- Philanthropy overload and competition for alumni time, talent and treasure
- Increasing student debt load
- Rising cost to attend universities nationwide will be stressful for families affecting our constituents during their lifetimes as students, alumni, parents and donors.
- Continued duress and panic in the economy limiting alumni time and gifts to University

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USD Alumni by the Numbers

The chart below is a current snapshot of the demographic makeup of USD's alumni population (as of January 2012). USD recently surpassed 56,000 alumni. We project a total of 64,000 alumni by June 30, 2015, approximately 37,000 undergraduate alumni and 27,000 graduate alumni.

Overview	Undergraduate Alumni	33,371
	Graduate Alumni	25,550
	Total Alumni ¹	56,647
Gender	Female	29,916
	Male	26,727
School	Arts & Sciences	22,140
	SBA	16,711
	Law	13,687
	SOLES	4,986
	Nursing	2,048
	Peace Studies	59
Age	Average Age	38.8
Regional	United States	55,199
	International	1,448
Top States	California	31,736
	Washington	1,234
	Arizona	1,165
	Colorado	1,061
	Texas	966
	Nevada	766
	Virginia	764
	New York	694
	Oregon	676
	Florida	571
	Illinois	557
Top CA Counties	San Diego County	18,219
	LA County	3,261
	Orange County	2,959
	Riverside	1,030
	Santa Clara	620
	San Francisco	609
	San Bernardino	494
	Ventura	443
	Contra Costa	424
	San Mateo	397

1. 2,274 alumni are both undergraduate and graduate alumni

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USD Alumni Association Five-Year Goals (by 2015)

*Metrics below are calculated on an annual basis. Items in **bold** indicate updated metrics as of this revision.*

Goal 1: A transformational increase in the number of alumni and students actively participating in the Alumni Association and life of the University on annual basis.

Key Metrics:

- Increase annual alumni attendees at global events from 5,000 to 15,000
 - **We had approximately 12,000 attendees at our events in 2011.**
- Increase annual active alumni volunteers from 500 to 2,500
 - **In 2011, we had approximately 650 active alumni volunteers.**
- Increase alumni participation in Homecoming & Reunion Weekend from 1,000 to 3,000
 - **Overall attendance increased due to merging of Homecoming with Family Weekend with 2,600 attendees.**
 - **However, Reunion attendance significantly increased, including more than 900 alumni who attended affinity reunions.**
- Increase Student Alumni Association membership from 120 to 1,000
 - **In January 2012, membership is at approximately 190.**
- Increase student participation in Student Alumni Association and Alumni Association programs from 3,200 to 10,000
 - **For FY 2011, student participation in SAA and AA programs was 4,700.**
 - **Began Fall Semester with first-ever “Senior Toast” at Degheri Alumni Center with more than 300 attendees. This will become a great annual tradition (co-hosted by University Ministry).**

Goal 2: A transformational increase in the number of alumni in active communication with the Alumni Association (active as opposed to passive communication, such as receiving USD magazine or emails).

Key Metrics:

- Increase average open rates of alumni emails from 15 to 30 percent
 - **Average open rate for our e-newsletters is currently 20%.**
 - **Average open rate for our event invitations is approx. 25%, and the open rates for other types of alumni emails depend on the subject matter.**
- Increase alumni email addresses from 50 to 90 percent
 - **January 2012 – We have email addresses for 59% of alumni.**
- Increase alumni website weekly hits from 600 to 3,000
 - **January 2012 – “alumni.sandiego.edu” has an average of 685 weekly hits.**
- Increase in social media followers from 6,000 to 25,000
 - **USD Alumni Association Facebook Page: 6,900/Regional pages: 400+**
 - **USD Regional Alumni Facebook Pages: 1,000**
 - **SAA Facebook Page: 170+**
 - **USD Alumni Association LinkedIn Group: 3,800 members**
 - **Other USD alumni-related LinkedIn Groups: Approx. 1,000 members**
 - **@GoUSDAlumni Twitter Feed (new): 60+ followers**
 - **@USDYoungAlumni Twitter Feed (new): 100+**
 - **Created Facebook Pages for 10 Class Reunions in 2012**
- Increase alumni participating in webinars and online programs from zero to 1,000
 - **Webinar planned for Regional Chapter Volunteers in summer 2012**
 - **Young Alumni Network planning a quarterly webinar series.**

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Goal 3: Exceed \$1 million fundraising goal for Alumni Association scholarship endowment and sustain increased annual funding levels.

Key Metrics:

- Meet or exceed current \$1 million fundraising goal for Alumni Association scholarship program by June 2012 (currently at \$625,000 as of Jan. 2011)
 - **As of January 2012, fund is at \$885,000. A push is underway to exceed the goal by June 30.**
- Increase annual USD Wine Classic fundraising effort from \$30,000 to \$60,000
 - **The third annual Wine Classic raised over \$40,000, bringing the total raised to \$120,000. The 4th Annual Wine Classic has a goal of \$60,000.**

Goal 4: Assist the University's goal to increase the undergraduate alumni participation rate from 11 percent to 20 percent.

Key Metrics:

- Increase alumni donors to Alumni Association scholarships from 700 to 2,100 (2,100 alumni donors would represent 6.6 percent towards USD's goal of 20 percent in 2015)
- The Alumni Board has a 100 percent giving rate. Increase giving rate of regional alumni leaders from 30 to 100 percent
- Increase giving rate of active Alumni Association volunteers from 20 to 50 percent
 - **Rate of Alumni Volunteer Giving is at 44% (FY11 Volunteers)**
- Increase senior class gift participation from 10 to 50 percent
- Increase young alumni giving from 8 to 30 percent
 - **Young Alumni Network leaders are promoting the "Torero \$20" Facebook campaign to raise participation levels among young alumni.**

Goal 5: Develop an Alumni Engagement and Satisfaction Index based on a biennial survey to alumni and show increasing scores over next 5 years (see Exhibit B for further explanation).

Key Metrics:

- **Alumni Attitude Study, an independently developed, comprehensive survey of alumni attitudes toward USD and the Alumni Association, is planned for distribution in February 2012, and a second survey will be sent to alumni in February 2014.**

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Strategic Direction: Alumni Group Segmentation

Relating to alumni as customers is a transformational way of viewing things and fundamental to this plan. By breaking down the alumni population into smaller targeted groups it provides more meaningful and impactful messaging, services, and programs for each group. There are a myriad of ways we could break down the alumni population; however, for focusing our efforts and ease of implementation we think that it is most important to first look at the alumni body inclusively by generation. This first section will explain how this will work. We also understand that graduate alumni may have different relevance propositions than undergraduate alumni and that many alumni feel connected to specific affinity or special interest group. In a follow-on sub-section we outline how these segmentation groups should receive additional focus.

Alumni Groups Based on Generation

Group (Undergrad and Grad)	Description	Number of Constituents (as of 1/2012)
Student Alumni	Current USD Students	8,317
Young Alumni	Alumni 0-10 Years out	22,145
Mid Career Segment 1	Alumni 11-25 Years out	24,309
Mid Career Segment 2	Alumni 26-40 Years out	9,315
Founding Alumni	Alumni 41+ Years out	3,897

By using *customer segmentation* it will be more efficient and effective to target services for each group. In the following section, the plan identifies several *relevance propositions* that will help determine the programming and *strategic services* delivered to each *customer group*. These *strategic services* generally represent the most critical elements of the alumni relationship. By addressing these strategic services we should be able to point to improved performance as manifested in the goals. Before we identify the services, we start by looking at the characteristics and relevance propositions for each group to determine what messages and services would be most appropriate. Each group will require a more detailed operational plan, but for the purpose of the strategic plan high-level strategic directives will be outlined along with additional metrics to benchmark.

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Engaging and Cultivating Alumni Groups

In this section we break down each of the customer groups under four key areas (Desired Outcomes, Directives, Additional Metrics and Critical Campus Partnerships).

Alumni Segmentation Relevance Matrix		
Alumni Group	Demographic Highlights	AA Relevance Propositions
Student Alumni (current undergrad and graduate students)	<ul style="list-style-type: none"> • Busy student lives • Text, Facebook and social media communication • First job search • Selection of major • Seek leadership and volunteer opportunities 	<ul style="list-style-type: none"> • Scholarships • Internships and summer jobs • Networking with alumni • Graduate School/Career Mentoring • Class identity & Torero spirit • Instill traditions & USD values • Student leadership and involvement opportunities
Young Alumni (alumni 0-10 years out)	<ul style="list-style-type: none"> • Real world transition • Facebook and social media communication • Give back through time vs. finances • First job search/establishing career 	<ul style="list-style-type: none"> • Job search • Networking and socializing with Alumni • Professional development • Build social network • 5- and 10-year reunions • Mass/Founders weddings
Mid-Career Segment 1 Alumni (Alcalá Alumni) (alumni 11-25 years out)	<ul style="list-style-type: none"> • Peak professional clout • Family commitments • Children applying to college • Email and phone communication • Give back through finances vs. time 	<ul style="list-style-type: none"> • Professional development • Ongoing education • 20- and 25-year reunions • Business development • Networking with alumni • Legacy/Admissions • Mass/Founders baptisms
Mid-Career Segment 2 Alumni (Second Score Society) (alumni 26-40 years out)	<ul style="list-style-type: none"> • Mature career • Maturing family • Children in college or graduates • Legacy consideration 	<ul style="list-style-type: none"> • Reintroduction to University • Travel/Educational programs • Challenging reunion years • Mass/Spiritual retreats
Founding Alumni (alumni 41+ years out)	<ul style="list-style-type: none"> • Empty nesters • Second career/retirement • Increased time for volunteer activities • Attention to leaving a legacy • Give back through both finances and time 	<ul style="list-style-type: none"> • Ongoing education • 50-year reunion • Mentoring alumni • Travel programs • Mass/Spiritual retreats

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Student Alumni (current undergraduate/graduate students)

Desired Outcomes:

- Students understand that USD is a lifelong family and maintain and respect USD traditions and values
- Students have opportunities to interact with and foster relationships with alumni throughout their student experience
- Upon graduation, students understand their role as alumni and transition to engaged young alumni
- Students participate in alumni activities as volunteers
- Students develop a culture of giving back to their alma mater with participation as the core message

Directives:

- Increase membership, breadth and visibility of Student Alumni Association
- Increase opportunities for students to network with alumni (both individually and through affinity groups)
- Develop new scholarship opportunities for students
- Create more activities with scholarship recipients
- Facilitate internship and job opportunities with alumni
- Provide personal and professional development opportunities (leadership, confidence, etiquette, etc.)
- Increase usage of social media tools to engage and cultivate students/future alumni

Additional Metrics:

- Number of student volunteers involved with Alumni Association
- Number of students attending Homecoming Tailgate
- Number of scholarship applications received
- Participation rate in Senior Class Gift

Critical Campus Partnerships:

- Students have positive customer service experience across the campus
- Partnership with Student Affairs on building class identity and sustaining traditions like Homecoming & Family Weekend
- Alumni participation in Move-In Days, Torero Days and Commencement
- Partnership with Residential Life on messaging and cultivation of students
- Messaging from Deans and faculty on USD family and fostering a culture of giving
- Partnership with Career Services on alumni internships and job opportunities
- Messaging from Admissions on USD as a lifelong relationship and importance of legacy
- Partnership with Student Affairs on identifying and coding student leadership and involvement

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Young Alumni (alumni 0-10 years out)

Desired Outcomes:

- Graduates feel welcomed into alumni community and are aware of alumni programs and benefits
- Graduates feel they have something to contribute to the alumni community right away
- Graduates feel Alumni Association facilitated interactions with alumni that assisted job search or graduate school decisions
- Young alumni stay connected to Alumni Association through attendance at regional and campus events and through social media and web communication
- Young alumni have relevant programming regarding real world transitions, career development and social interaction
- Young alumni continue giving to USD based on culture of giving that was instilled while students at USD
- Young alumni update contact information with Alumni Association during transient years after college

Directives:

- Develop Alcalá 100 into core alumni leadership group
- Launch and growth of Young Alumni Network
- Tiered pricing structure to encourage young alumni attendance at events and programs
- Increase opportunities for young alumni to come back to campus and interact with students and each other
- Provide real world transition and career development opportunities
- Increase usage of social media tools and webinars to engage and cultivate young alumni
- Encourage development of affinity related groups
- Identify and cultivate “tipping point alumni”

Additional Metrics:

- Number of young alumni volunteers
- Attendance at five and ten year reunions
- Young alumni giving rates
- Membership in Young Alumni Network Leadership Council

Critical Campus Partnerships:

- Positive customer experience across campus especially financial aid, registrar and parking
- Partnership with Career Services on assessment and job search skills
- Partnership with Athletics to encourage young alumni to attend athletic events
- Partnership with IT to ensure USD email and network privileges remain
- Partnership with University Ministry (weddings, retreats)

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Alcalá Alumni – Mid-Career Segment 1 (alumni 11-25 years out)

Desired Outcomes:

- Alumni actively seek to hire USD students and alumni for internships and jobs
- Alumni actively help fellow alumni and students build their professional networks
- Alumni actively promote USD to colleagues, family and friends
- Alumni consider sending their children to USD for college
- Alumni participate in the life of University on advisory boards and search committees, and as speakers and mentors for students
- Alumni volunteer their time and give financial support to the University
- Alumni view USD and the Alumni Association as a career resource, as well as their home, a place where they belong.

Directives:

- Increase professional development and ongoing educational opportunities
- Highlight the successes of accomplished alumni via Alumni Association and USD media outlets (USD Magazine, Featured Torero, USD website, Inside USD, etc.)
- Ask alumni to share expertise through speaking engagements, hosting webinars, serving on advisory boards and search committees, etc.
- Build a culture of giving specifically around the milestone 20- and 25-year reunions
- Provide relevant programming and support for many alumni who are preparing their children for college admissions and taking care of elderly parents
- Identify and cultivate “tipping point alumni”

Additional Metrics:

- Attendance at 20- and 25-year reunions
- Participation in 20- and 25-year class giving campaigns
- Number of legacy students
- Increase number of career-related panels and workshops for mid-career alumni

Critical Campus Partnerships:

- Partnership with Admissions to clarify legacy programs for children of alumni
- Coordination with Deans and faculty to encourage speaking opportunities and advisory board participation for alumni
- Coordination with Development Office to facilitate cultivation of major gift prospects
- Positive customer experience across campus
- Partnership with Career Services on facilitating internship and job opportunities for students and career services for alumni
- Partnership with University Ministry (weddings, baptisms)

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Second Score Society – Mid-Career Alumni Segment 2 (alumni 26-40 years out)

Desired Outcomes:

- Alumni actively seek to hire USD students and alumni for internships and jobs
- Alumni actively help fellow alumni and students build their professional networks
- Alumni actively promote USD to colleagues, family and friends
- Alumni with children attending USD
- Alumni participate in the life of University on advisory boards and search committees, and as speakers and mentors for students and fellow alumni
- Alumni volunteer their time and give financial support to the University
- Alumni view USD and the Alumni Association as a career resource, as well as their home, a place where they belong.

Directives:

- Increase ongoing educational opportunities
- Highlight the successes of accomplished alumni via Alumni Association and USD media outlets (USD Magazine, Featured Torero, USD website, Inside USD, etc.)
- Ask alumni to share expertise through speaking engagements, hosting webinars, serving on advisory boards and search committees, etc.
- Build a culture of giving specifically around the 30- and 35-year reunions
- Provide relevant programming and support for many alumni who might be on the verge of becoming “empty nesters” or taking care of elderly parents
- Identify and cultivate “tipping point alumni”

Additional Metrics:

- Attendance at 30- and 35-year reunions
- Participation in 30- and 35-year class giving campaigns
- Number of legacy students
- Increase number of career-related panels and workshops for mid-career alumni

Critical Campus Partnerships:

- Coordination with Deans and faculty to encourage speaking opportunities and advisory board participation for alumni
- Coordination with Development Office to facilitate cultivation of major gift prospects
- Positive customer experience across campus
- Partnership with Career Services on facilitating internship and job opportunities for students and career services for alumni
- Partnership with University Ministry (weddings, baptisms, spiritual retreats)
- Development and strengthening of educational and travel opportunities for alumni

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Founding Alumni (alumni 41+ years out)

Desired Outcomes:

- Alumni actively seek to hire USD students and alumni for internships and jobs
- Alumni actively help fellow alumni and students build their professional networks
- Alumni actively promote USD to colleagues, family and friends
- Alumni consider sending their children and grandchildren to USD for college
- Alumni participate in the life of University on advisory boards, search committees, speakers and mentoring students
- Alumni volunteer their time and give financial support to the University

Directives:

- Increase ongoing educational opportunities
- Provide messaging and programming focused on College for Men and College for Women
- Provide travel program opportunities to relevant and meaningful locations (Vatican, Israel, Guadalajara, etc.)
- Highlight the successes of accomplished alumni via Alumni Association and USD media outlets (USD Magazine, Featured Torero, USD website, Inside USD, etc.)
- Build a culture of giving specifically around the milestone 50-year reunion
- Provide relevant programming and support for many alumni who are preparing for retirement
- Identify and cultivate “tipping point alumni”

Additional Metrics:

- Attendance at 50-year reunions
- Participation in 50-year class giving campaign
- Number of legacy students

Critical Campus Partnerships:

- Coordination with Continuing Education on University of Third Age programming
- Coordination with Deans and faculty to encourage speaking opportunities and advisory board participation
- Coordination with Planned Giving for Bridges programming and to facilitate cultivation of planned gifts to University
- Positive customer experience across campus
- Partnership with University Ministry (retreats)

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Sub-section A: Graduate Alumni

While the broader approach to segment the population by generation is inclusive, we recognize that Graduate Alumni have specific needs as a group and we have identified additional ways we can engage these alumni. It will be most efficient for these graduate alumni groups to be developed and led with strong involvement and ownership of the respective graduate schools where possible. The Alumni Association will support the effort by providing guidance and strategic leadership but alumni from the respective graduate schools should be the primary organizer.

Desired Outcomes:

- Graduate alumni feel they have something to contribute to the alumni community through support of their interests
- Graduate alumni will feel that the value of their graduate degree exceeds expectations based on the network of contacts, opportunities and recognition they are provided.
- Graduate alumni stay connected to their graduate school and the Alumni Association through attendance at regional and campus events, and through social media and web communication

Directives:

- Develop specific leadership groups or councils for the respective graduate schools
- Develop specific strategies for these alumni groups that are coordinated with the Alumni Association
- Increase opportunities for these graduate alumni to come back to campus and interact with students and each other
- Provide real world career development opportunities
- Increase usage of social media tools and webinars to engage and cultivate alumni
- Identify and cultivate “tipping point alumni”

Additional Metrics:

- Number of graduate alumni volunteers
- Attendance at milestone reunions and other key events sponsored by the graduate schools
- Membership in respective Graduate School Alumni Councils

Critical Campus Partnerships:

- Positive experience across campus when these graduate alums visit
- Partnership with appropriate USD areas beyond the graduate schools that provide alumni with true feeling of membership, value and inclusiveness

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Sub-section B: Alumni of Color Groups

We recognize that alumni of color also have specific opportunities to network, to be engaged and to be supportive of the University.

Desired Outcomes:

- Alumni of color stay connected to Alumni Association through attendance at regional and campus events and through social media and web communication and support specific activities

Directives:

- Develop specific leadership groups or councils for the alumni of color groups
- Develop specific strategies, tactics and services for the alumni of color groups
- Increase opportunities for these alumni to come back to campus and interact with students and each other
- Provide career development opportunities
- Identify and cultivate “tipping point alumni” in each segment group

Additional Metrics:

- Number of alumni volunteers for affinity groups
- Attendance at annual reunions and events
- Track and measure alumni giving rates among this group
- Membership in respective alumni councils

Critical Campus Partnerships:

- Positive experience across campus
- Programming and engagement with the Center for Inclusion and Diversity
- Student life activities

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Sub-section C: Affinity/Special Interest Alumni Groups

As stated previously, we recognize that alumni with special interests and affiliations have specific opportunities to network, to be engaged and to be supportive of the University based on things that they chose to participate in when they were a student. Some examples include Greek life alumni, Rugby alumni, Mortar Board alumni, etc. These affinity alumni groups are going to be dependent on volunteer leaders within their respective alumni communities. The Alumni Association will provide guidance, best practices and support where possible.

Desired Outcomes:

- Alumni feel they have something to contribute to the alumni community, current students, and the USD community through support of their interests and service projects on campus and in their communities
- Alumni stay connected to Alumni Association through attendance at regional and campus events and through social media and web communication

Directives:

- Develop specific leadership groups or councils for these affinity groups
- Develop specific strategies, tactics and services for these affinity groups
- Increase opportunities for alumni to come back to campus and interact with students and each other
- Provide career development opportunities
- Increase usage of social media tools and webinars to engage and cultivate alumni
- Identify and cultivate “tipping point alumni” in each affinity group

Additional Metrics:

- Number of alumni volunteers for affinity groups
- Attendance at annual reunions and events
- Track and measure alumni giving rates among affinity groups
- Membership in respective alumni councils

Critical Campus Partnerships:

- Positive experience across campus
- Student life activities
- In the case of former athletes, partnership with Athletic Department to attend athletic events and to counsel and support student athletes

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Strategic Direction: Volunteer Empowerment

The Alumni Association will not meet its aggressive five-year goals without becoming a truly volunteer-driven organization and fundamentally changing the way it empowers its volunteer base. We will instill a culture of autonomy and accountability for our Alumni Board leadership that will permeate through the entire body of volunteer leadership.

Starting at the top, the Alumni Board will become more self-sufficient and less reliant on staff support from the Office of Alumni Relations. When brainstorming and proposing new ideas, strategies, programs or events, we must give first consideration to who will implement this initiative. Great ideas moving forward will be ones that can have a big impact on one of our strategic goals but just as importantly, be implemented or managed by members of the Alumni Board and alumni volunteers with minimal support from staff. To be sure, the Office of Alumni Relations will continue to provide support and guidance to the Alumni Board of Directors and alumni volunteer leadership, but staff must be willing to stand down as the alumni stand up.

Directives for Volunteer Empowerment:

- A culture of accountability and autonomy that permeates the entire alumni volunteer apparatus
- Staff will develop additional templates, tools, job descriptions and volunteer training
- An Alumni Leadership Conference or “Alumni Council” will take place each year to invigorate, train and recognize the volunteer leadership of the USD Alumni Association.
- Streamlined protocols for access to alumni contact information that respects the confidentiality and integrity of the data.

Strategic Direction: The Alumni-Inclusive Campus Community

As stated at the beginning of the strategic plan, the transformational change we seek will only happen once alumni relations is the work of the entire USD community as opposed to the sole efforts of the Alumni Association and Office of Alumni Relations.

Directives for an Alumni-Inclusive Campus:

- Develop annual report on Alumni Association progress for the campus community
- Annual meeting for campus community on the state of the Alumni Association
- Proactive collaboration with the schools and the college on engagement initiatives
- Development of Faculty/Staff Alumni Chapter that promotes and leverages the alumni presence on campus
- Acknowledgement of alumni in all communications as one of the core campus constituents
- Ensure alumni presence is felt in both person and spirit
- Campus wide customer service practices that reflect a commitment to alumni satisfaction

Strategic Direction: Alumni Engagement Dashboard

As seen throughout the strategic plan there are core metrics that will be monitored on a monthly basis at Executive Committee meetings of the Alumni Board and reviewed with the entire Alumni Board at the quarterly Alumni Association Board of Directors meetings. See Exhibit A - Alumni Engagement Dashboard.

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Exhibit A Alumni Engagement Dashboard

Goal 1: A transformational increase in the number of alumni and students actively participating in the Alumni Association and the life of the University on an annual basis.

Key Metrics	5 Year Goal	Current
Student Participation in SAA/AA Programs	10,000	4,700
Active Alumni Volunteers	2,500	650
Homecoming & Reunions	3,000	900
SAA Membership	1,000	190
Alumni Event Attendance	15,000	12,000

Goal 2: A transformational increase in the number of alumni in active¹ communication with the Alumni Association.

Key Metrics	5 Year Goal	Current
Alumni Satisfaction Survey response rate	45%	22%
Email open rates	30%	20%
Alumni email addresses	90%	59%
Social media followers	25,000	6,900
Alumni website weekly hits	3,000	685
Alumni participation in webinars & online programs	1,000	0

Goal 3: Exceed \$1 million fundraising goal for Alumni Association scholarship endowment and sustain increased annual funding levels

Key Metrics	5 Year Goal	Current
\$1M Scholarship Fund Goal by 6/2012	\$1,000,000	\$885,000
USD Wine Classic Annual Fundraising	\$60,000	\$30,000

Goal 4: Assist the University's goal to increase undergraduate alumni participation rate from 11 to 20 percent.

Key Metrics	5 Year Goal	Current
Annual Alumni Association scholarship donors	2,100	700
Undergraduate Alumni Participation	20%	11%
Alumni Trustee participation rate	100%	100%
Alumni Board participation rate	100%	100%
Regional Alumni Leader participation rate	100%	30%
Alumni volunteer participation rate	50%	44%
Senior Class gift participation rate	50%	10%
Young Alumni participation rate	30%	8%

Goal 5: Develop an Alumni Satisfaction Index² based on bi-annual survey to alumni and show increasing scores over next 5 years.

Key Metrics	Calendar Year	Index
Alumni Satisfaction	2012	
Alumni Satisfaction	2014	

1. As opposed to passive communication such as receiving USD magazine or emails
2. Alumni Attitude Study, an independently developed, comprehensive survey of alumni attitudes toward USD and the Alumni Association, is planned for distribution in February 2012, and a second survey will be sent to alumni in February 2014.
3. Annual data provided above is for fiscal year 2010-2011 ending June 30, 2011.; all other data provided is current as of the date of noted revision date.

Exhibit B
Alumni Satisfaction Study

Purpose: To provide a systematic method to monitor and track the level of engagement and satisfaction the alumni body has for USD. Survey will provide more than a simple percentage satisfied, it will provide diagnostic information about what is driving satisfaction and engagement, where there are strengths and weaknesses, and what level of engagement the alumni are reporting. The data would be broken down and analyzed by segment (class year, geographic location, activity level, etc.). On an on-going basis (biennially), this measurement tool will provide USD and the Alumni Association with a solid, fact-based means of identifying where progress is being made and where deficiencies need to be addressed.

Method: Online survey conducted by sending an email invitation to email addresses of USD alumni. Survey would be conducted on a biennial basis. Survey window would be open for approximately 2-3 weeks when alumni could respond and provide their ratings.

Rather than expend resources to develop a survey tool, the Alumni Office will contract with a professional, independent organization utilizing an existing survey. The use of the independent organization will give additional weight to the survey. Using a survey that has been developed over the past decade by alumni professionals around the country will help with benchmarking toward the development of best practices. Identifying trends and motivators will help target programming and communications more effectively, deepening the level of engagement with alumni. Sharing this data with administrators, faculty, and other staff across campus will help in the effort to increase awareness of, and build support for, alumni engagement efforts.