

Operations Financial Plan of Action for Alumni Relations

Criteria: *What are the main objectives of your unit and how do you measure success in achieving them? How do you review and evaluate your department's yearly performance?*

Alumni Affairs started August 25, 1926, with the first graduating class. The Alumni Relations office of today was re-established in 2003. We currently have 23,683 living alumni. The objective is to continually engage alumni with the institution. This engagement will increase giving and garner public support of the institution. We evaluate alumni events by tracking, new attendees, recurring attendees and alumni giving. We have been very successful as the alumni giving has increased each year, 2015/16 3.94% to 2016/17 4.29%. The national average for public institutions according to Blackbaud Summary of Annual Giving Key Performance Indicators /July 2015 – June 2016 is 5%. Without continuation of alumni activities, the giving will ultimately be reduced. This office is staffed at a 1.5 FTE.

The following initiatives have been created since 2003. In 2008, the staffing of the Alumni and Foundation offices went from 6.5 FTE to 3. This required an adjustment of programs and the alumni director took on a fundraising role by including planned giving and fundraising visits. In July 2015, we added a foundation administrative assistant, promoted the Alumni Program Coordinator to Assistant Director of Alumni to allow the Alumni Director (position change to Executive Director of Alumni (.5 FTE) and Donor Relations (.5 FTE) more time to fundraise. There has been a 22% increase in gifts since the reorganization. The Associated Alumni of ASU operates with an MOU with the ASU Foundation.

Initiatives: Events & Chapters

Locations are determined by plotting the alumni addresses. In areas where there is a concentration or an engaged group, an event is scheduled. Attendance at events is recorded in our database, Talisma Donor 2. We evaluate alumni events yearly based on the number of returning alumni, alumni attending for the first time and new or increased giving. We strive for at least 30% of attendees to make a gift or increase their gift within 12 months of the visit. For example, we had 986 alumni attend events from 2015 to May 13, 2016. 25% of alumni have made a gift after the first event; 54% have made a gift in their lifetime. We also take into account feedback from alumni and thank you cards, positive notes, etc. We have a yearly planning meeting in August to set the alumni event schedule for the upcoming year. At that time, we evaluate each program before continuing.

- San Luis Valley started in 2003 with 3 events per year, decreased to 2 events per year in 2008 but increasing to 3 in 2017
- Pueblo, started in 2003, increased to 2 events per year in 2005, decreased to 1 event per year in 2016
- Colorado Springs, started in 2005 with 2 events per year, decreased to 1 event per year in 2016
- Denver started in 2003, increased to 2 events per year in 2005, decreased to 1 event per year in 2016
- In even years, we do a statewide event; i.e. sporting events, train trips, etc.

The following chapter events were reduced to every other year. After evaluation, we did not see an increase with new attendees, but did see the increase in giving and returning alumni. The events were still considered effective but adjustments were needed. By reducing the visits to every other year, travel costs were reduced, allowing the schedule to accommodate additional areas.

- Lamar
- Walsenburg
- La Junta
- Grand Junction
- Durango
- Albuquerque
- Santa Fe
- Phoenix
- Tucson
- San Diego
- San Francisco
- Orange County
- Washington DC

Chapters that have been removed for underperformance include: Philadelphia, New York, Gunnison, Fort Collins, and Los Alamos.

We have also hosted events in Orlando, Juneau, Seattle, Fort Lauderdale, Boston, Mosca, South Fork, Fort Garland, Baltimore, Fort Collins, Kansas City and Canon City. We hold events in cruise departure cities and, if staff is at a conference or in the area for any reason, an alumni event is hosted.

Initiative: Denver Chapter

The Denver chapter was established in 2015, with the goal of assisting the Alumni Relations Office in the Denver metro area. The group calls alumni, has an annual meeting, assists the Denver admission recruiters with college fairs, and in summer 2017 started an annual scholarship luncheon. Evaluation indicates the program may not be effective. There is poor attendance at their events compared to events hosted by the Alumni Office, they only participated in 15 of the 25 recruiting events, and low attendance at the scholarship dinner. The chapter did engage the committee of 6. The group has one more year (three-year trial) then a decision will be made for continuation.

Initiative: A-Stater, Alumni magazine

We send approximately 18,000 A-Stater alumni magazines to alumni and current donors three times a year. In 2009, we reduced the magazine from four times a year to three to cut costs. In 2010, we started including envelopes in two additions, in 2015 we moved to envelopes in all editions. We look for engagement by gifts made through the magazine and feedback. In 2017 we receive gift in 2016 we receive \$9335, in 2017 we received \$6494.

Initiative: Homecoming

ASU Homecoming is a tradition started in the fall 1930 when the first football team was established. The goal is to provide tradition, therefore, we evaluate on attendance. Changes that have been made in the last ten years include:

- Providing a more upscale banquet.
- Adding an additional award at the banquet, the Exceptional New Alumni Award, to target a younger alumni audience. We also recognize our Outstanding Alumni at the banquet.
- Including a beer garden at the tailgate party.
- Refreshing the parade to include more community members.
- Providing flags displayed on Main Street celebrating Homecoming as a community event.
- Adding the Adams Family Feud game show, where alumni play against students.

We have had consistent participation for the last 10 years, recognizing the banquet attendance is a direct reflection of the award winners. We have also tracked that the later the date, the fewer the attendees. The homecoming date is set by the athletic department. The most recent change was combining the tailgate party with the Grizzly Club tailgate to reduce duplication of services. In 2016, we did a count of participants at the parade and have a bench mark of 1,256 community members. Past attendance has been:

- 2013: 412
- 2014: 382
- 2015: 444
- 2016: 446.

Initiative: Travel Program

For a period of 3 years (2003-2006), we asked our alumni what services they wanted us to provide. A travel program was one of the top requested. The goal is engagement. In 2009, we took our first cruise and have offered a trip every other year since. The cruise line reimburses our expenses and the connections are very positive, including increased giving by participants, and many return participants. We have had 371 people utilize the program. Currently, 77% of the alumni who have participated in the travel program are donors. Cruises are selected to accommodate a wide variety of mobility and dietary restrictions. We operate through a local travel agency, Dream Vacations.

Initiative: Alumni Board of Directors

The Alumni Board of Directors was established and incorporated as The Associated Alumni of Adams State College on December 13, 1973. The current mission was created by the board of on February 5, 2005, and is reviewed yearly at the February retreat along with the MOU. Since 2005, the Board had determined that the mission is current and relevant to the direction and purpose of the association. "The Mission of the Adams State University Alumni Association Board of Directors is to reach out to the current alumni, future alumni, and the community in order to cultivate loyalty, pride, and commitment to Adams State University." The mission aligns with the ASU strategic plan under strategic Goals 4 & 5. Each Initiative of the Alumni Relations Office falls under the mission concepts:

- Current Alumni: alumni events, birthday cards, sympathy cards, alumni literature night, A-Stater magazine, E-newsletters, alumni email, travel program. The association has a liaison with the foundation.
- Future Alumni: New Graduate brunch, Next Generation dinner, graduation t-shirts, scholarships, mentorship program, career services link, leadership awards banquet, Denver chapter recruitment committee, Porters Scholarship dinner, Spud Bowl sponsorship, and Student Scholar Days. Community: Homecoming, ribbon-cutting events, Teacher Hall of Fame, Music Hall of Fame, Athletic Hall of Fame, retiree events, teacher appreciation luncheons, and events in conjunction with the president.

Initiative: Data cleansing

This is an administrative necessity. We utilize Donor Search for batch address updates. At any given time, we have approximately 23% of our graduates with wrong or missing addresses. We utilize Alumni Finder for individual address searches. We are required to have the data updated every 90 days to do bulk mailing, which is done through the NCOA database. In 2017, we sent 53,380 pieces of mail, including mailings for other departments, and had 29 email campaigns for a total of 11,458 emails sent.

Initiative: Reunions

The goal of reunions is to bring together alumni with a common interest and increase engagement with the campus. We try to host one reunion every other year. One reunion group that meets yearly has created an endowed scholarship. We have hosted theatre, music, band, x-country, basketball, baseball, wrestling, football, and volleyball reunions. We evaluate the program by attendance.

Initiative: Alumni Literature Night

Alumni Literature nights were started in conjunction with the Nielsen Library to celebrate our alumni authors. The events feature readings and book signings. The first event was in November 2014, the second event took place in April 2015, third event was in December 2016 and the final event was December 2017. The event has been canceled based on evaluation of participation.

Initiative: Tee-shirts at Graduation

T-shirts at graduation have been a long-time tradition. It is customary for alumni associations to give a graduation gift to new graduates. In 2002, the association decided to give a shirt that was the graduates' first item labeled "Alumni" and would provide advertising. The shirt style has stayed the same to provide a legacy. We are able to purchase the shirts for \$6. We hand out approximately 700 shirts a year. We have noticed at events and in the community, the alumni wear the shirts. No changes have been made to the program because it is meeting the goal.

Initiative: Alumni email accounts

Based on a request from alumni, in 2011 we created a google alumni email account service. Student emails are only active for current students. When students graduate, they lose the contacts and emails they have had for the last 4 years. We established "alumni.adams.edu" emails through google with the ability to migrate emails over to the new account from the

grizzly student account. Students receive an email their last semester indicating their accounts will be closed and to contact the alumni office if they are interested in a new one. We currently have 163 active users. The number of requests increases each year. The initiative is low cost and does not require large amounts of time. <https://www.adams.edu/alumni/emailfaq.php>

Initiative: Alumni Scholarship

The Alumni Board of Directors Future Alumni committee meets annually and reviews applications for the alumni scholarship. The scholarship was established and funded by the Alumni Association until 2009 when the Alumni Association signed an MOU with the Foundation. There are 10 scholarships valued at one-semester resident tuition. The student must have a 2.5 GPA and preference is given to children and grandchildren of Adams State Alumni. In 2011, we created a rubric for evaluating applicants; in 2013 the rubric was revised to clarify the GPA requirement. If the initial 10 applicants do not attend or are not eligible, the group provides alternates with the goal of utilizing the scholarship. We receive, on average, 75 applications every year. The group also selects the Southway Alumni Scholarship recipient, which has similar criteria. The scholarship recipients are invited to a dinner in November to meet with the alumni board at the annual Donor Recognition. The scholarship is advertised in the annual scholarship guide.

Initiative: New Graduate Brunch

The New Graduate brunch was developed to engage students before they leave campus. In 2003, we hosted a social that was poorly attended for two years in a row and the event was canceled. Based on the recommendation of the alumni board, we tried again in 2016 and again the attendance was poor, 12 students. We discontinued the dinner. We still needed to reach the population. With guidance from the student activities board, we decided to host a breakfast. It is scheduled the Monday of finals week when students do not have class, making it easier to attend with few activity conflicts. The first event was very successful with 52 participants and very favorable feedback from the students, including numerous "likes" from Facebook. This initiative will continue for two more years and be evaluated then.

Initiative: Mentorship program

The Alumni Relations office has worked continually with the career services center on a mentorship program since 2007. After evaluation in 2016, we took a different approach and established a program fully maintained within the Alumni Relations office. The program includes an email sent in early May and December asking faculty to recommend graduating students that would benefit from the program. Then based on the students' geographical area, career goals and interests, we hand-select an alumni mentor. The alumni staff and faculty provide introductions and check-in with the mentor and mentee once a semester. The feedback was very positive with the 2016 mentee and the program will continue. In 2017 we plan to send emails to graduating students.

Initiative: Financial assistance of student groups

On occasion student groups need additional financial assistance to attend leadership workshops, conferences, and festivals. Student groups submit a letter to the Alumni Relations Office containing a picture and a brief summary of what was gained by attending. In the last 5

years, we have assisted students attending the IMACS International Conference, Regional & Kennedy Center/American College Theatre Festival, and Student Scholar Days.

Initiative: Next Generation dinner for children of alumni

This is a new initiative that started September of 2017. The goal of this initiative is to assist with retention of students. As a starting point, we plan to invite the children of alumni to special social gatherings to build a cohort of students that have something in common. The group will be connected to an additional support group through our office, including Alumni Board member volunteers. The initial list of students will consist of students that apply for the Alumni scholarships. The goal is to have the students retain at a higher rate than the whole student body. If the program is effective, we will ask each student to bring one additional friend.

Initiative: Day at the Capitol

In 2015 under the direction of our new President, we added the Day at the Capitol event. The goal was to have alumni connect with the state legislative body to share the importance of ASU statewide. The event consisted of a reception and a breakfast at the state capitol. After two years, the event was determined unsuccessful due to the high cost and poor alumni attendance. The program was moved to the President's office which has a larger focus on legislators.

Initiative: Teacher Appreciation luncheons

A large portion of our alumni group are educators. In 2005, we hosted a San Luis Valley teacher luncheon on campus and had a good response. In 2006, the numbers dropped to 9. The feedback is that they are too busy to attend events on campus. In 2010, we began taking lunch to individual schools and feeding both faculty and staff. This has been very successful. To date, we have attended 12 of the 14 school districts in the San Luis Valley. In the last 7 years, we have met with 489 valley educators.

Initiative: Retirees Events

The retirees of ASU have a strong affiliation with our university. Upon retiring, they become members of our ASU Retiree's Association. We host an annual dinner for the group. The group gives at a higher rate than other groups, and to date have established 48 scholarships or Honor/Memorials.

Initiative: Birthday Cards/Sympathy cards

In an effort to have an additional presence at a lower cost, we started a birthday card program in September 2015. We send hand-written birthday cards to our alumni that are over 65. These cards are sent weekly, with a monthly average of 450. We have many thank you notes from alumni for remembering them.

The sympathy card program started in 2003 but was eliminated in 2008 due to reduced staff. In 2015 with additional staffing we reinstated the program. When we are notified of an alumnus passing away, we send a sympathy card and list them in the A-Stater. We have a subscription to Obitary.com and the Valley Courier to capture the names.

Initiative: E-newsletter

In an effort to continue to provide information in a timely, low-cost manner, we started an e-newsletter. We utilize Constant Contact for email delivery that tracks unsubscribes. The first

newsletter was sent February 2, 2017. Newsletters are sent every semester in-between the editions of the A-Stater alumni magazine. The first letter had a 41% open rate, 12.8% click rate. The goal was a 20% open rate, 10% click rate, and less than 30 unsubscribes. The first letter met the goals.

Initiative: Surveys

Every graduating senior is given a survey in their graduation packet. The survey asks for a new address, if employment is obtained, and involvement in student clubs. We track this information in our database. Starting in 2016, we introduced a more comprehensive survey of alumni one year, three years, and five years after graduation. The survey focuses on employment, the first date of employment, preparation for the work force, graduate school, additional degrees, fellowships & internships, learning outcomes that are utilized in the work force, and how ASU prepared them and their satisfaction with their success. We currently send an email version via Survey Monkey and a direct mail copy for any graduate that does not have an email listed. The results are shared with the office of Institutional Effectiveness. We had an 11.6% response rate for the email survey, and 7.1% for the direct mail. The 2016, online results (65 responses) indicated that 65% were employed in 1-6 months after graduation, 100% were currently employed, 91.1% felt they were somewhat or adequately prepared for the work force.

Initiative: Participation/Sponsorship/Assistance with Institutional events and award programs

The office provides financial assistance and/or event planning assistance for many campus events. In the last 10 years, we have assisted with Student Leaders Award Banquet, Teacher Hall of Fame, Music Hall of Fame, and Athletic Hall of Fame. We work with different departments and groups to assist with award events. This also includes assistance for grand opening and naming ceremonies.

Criteria: In what ways does your unit relate to other units of the university, academic and nonacademic?

We are integrated with all academic units through alumni-supported scholarships. There are currently over 60 scholarships for academic areas that were funded by Alumni. Alumni have been guest speakers for classes and lunch-time talks. An alumnus has funded the Teri McCartney endowment for the Creative Arts that enhances professors' projects to bring back to the classroom. The alumni office has done mailings/emails for the following academic departments: Counselor Education, Masters in Business Administration, the Chemistry's Adams Atom, Music, English and Teacher Education. We feature articles in the A-Stater on many academic departments. In the most recent edition we included: Ph.D Program gains CACREP Accreditation, Bring down the Walls, The Anne Frank Theatre Project, Getting Saxy with the music departments Uptown and Downtown Jazz Ensembles, Bridging Worlds through Music and four pages of athletic news. Each edition of the A-Stater lists academic pursuits of both professors and students. We also make contributions to student groups if they perform at Alumni events.

The alumni relations main involvement with non-academic units is Homecoming, in coordination with the Grizzly Activity Board. Alumni Relations specifically sponsors the Spirit award, sponsorship for float-making workshop, the Adams Family Feud game and purchases the parade permit. We have an active

role in New Student Orientation, reunions for athletic teams, surveys for institutional assessment, and assistance with award programs. We house all alumni addresses. We assist the President's office with a variety of events including: Day at the Capitol, lunches at the president's house, the president's end of the summer party, president's holiday party, and ribbon cutting & grand openings.

What resources do you need to improve your services to a superior level? How could the university help your unit do its job better?

We offer a superior program for the amount of resources we have. I believe staffing and funding is adequate under the current circumstances. A 2.0 FTE would be optimal since some initiatives have been reduced due to staff size. The current funding is doable, but in the future the operational funding should increase each year equal to inflation. The majority of expenses are travel and events which are driven by inflation. It is important to keep constant contact with alumni. In 2009 we did 43 alumni events, in 2017 we were only be able to do 21.

Comparison to other alumni relations programs: ASU Alumni Relations has 1.5 FTE and operating budget (excluding salary) of \$63,636. Western State Colorado University Alumni Relations has 2.0 FTE and an operating budget (excluding salary) of \$80,000. Mesa has 2 alumni staff. Fort Lewis has 15 Alumni & Foundation staff, and Metro has 25 Alumni and Foundation staff.

Additional evaluation to follow from MPW strategies.

Do you see needs and demands for services that your unit cannot currently meet? If so, what are they, and how do they relate to the university's mission?

I see the demand for more social media and more on-line engagement via Snapchat, Instagram, etc. This would be to engage our new graduates. We currently are struggling to meet these needs due to staff size.

The Alumni Relations office directly impacts the 2020 Strategic Plan. Alumni giving addresses Goal 4: Access and Affordability by providing scholarships. Other initiatives address Goal 5: Community Relations by collaborating with the SLV community which includes 3600 of alumni and providing information via the A-Stater.