

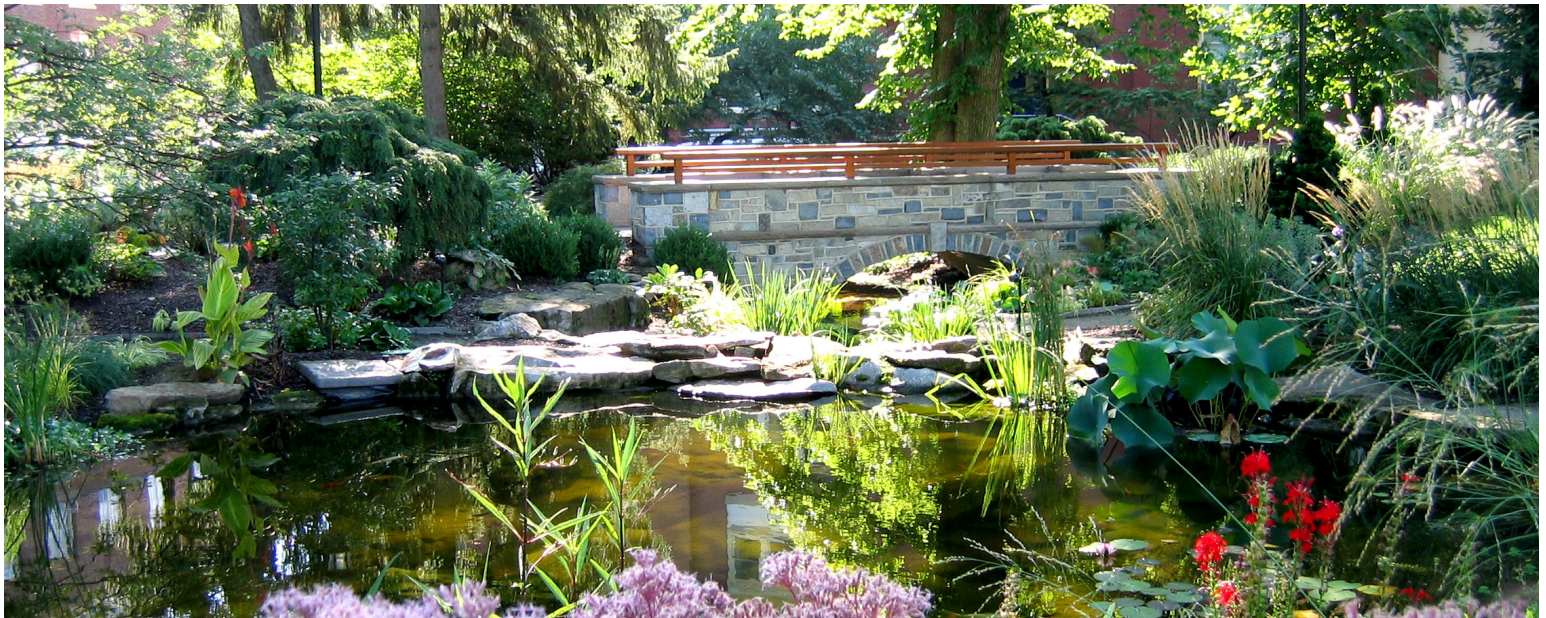


VISION 2020: POWERED BY PRIDE

A strategic plan for the
Penn State Alumni Association
2016-2020



PennState
Alumni Association



EXECUTIVE SUMMARY

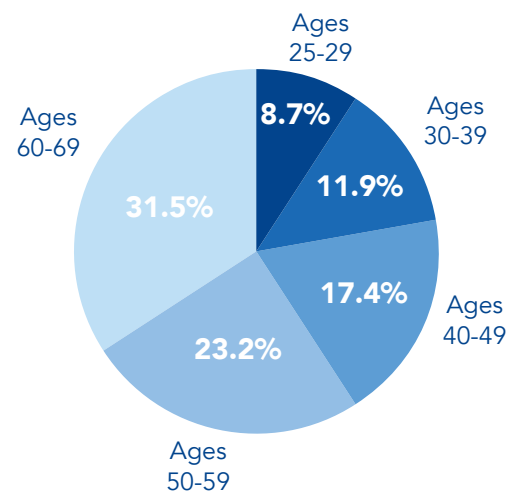
In 2020, the Penn State Alumni Association will celebrate 150 years of service to Penn State and her alumni. Throughout our history, the Alumni Association has been committed to keeping Penn Staters connected throughout their lifelong relationship to Penn State. Particularly during the last 30 years, the Penn State Alumni Association has emerged and is widely regarded as one of the top organizations of its kind in the world.

Our strategic plan, **VISION 2020: POWERED BY PRIDE**, aims to continue the storied history of service and engagement of the Penn State Alumni Association. It is constructed to help us meet the challenges ahead posed by a shift in our alumni demographics, generational trends, and the most diverse definition of the Penn State experience in the history of our institution.

SHIFTING DEMOGRAPHICS/GENERATIONAL TRENDS

The Alumni Association has been and should continue to be positioned to engage alumni of all generations. Continuous monitoring of our alumni population and identifying shifts in demographic trends is a key characteristic of a nimble, member-focused organization. The Penn State alumni population is trending younger with approximately 37 percent of our alumni graduating in the last 15 years. Over the next 10 years, approximately 170,000 more will graduate. These numbers are in contrast to our alumni membership population in which the average age is 50, and 70 percent of our members are over the age of 40.

The market penetration of our alumni by decade also shows declining rates in younger alumni populations:



Overall: 19.7% market penetration

SHIFTING PENN STATE EXPERIENCE

The traditional student experience of two-plus-two or four years at University Park has grown to now include students who graduate from Commonwealth campuses and World Campus without ever stepping foot on the University Park campus. These varied ways to experience Penn State pose significant challenges to engaging students and alumni alike through the Alumni Association.

Built on the following foundational brand pillars ...

- Spreading the good news of Penn State and her alumni
- Supporting and Enhancing the Student Experience
- Building and Sustaining Lifelong Relationships
- Harnessing the Power of the Penn State Network
- Celebrating Academic Achievement
- Upholding Tradition and Sustaining Spirit

... the Alumni Association will address challenges and take advantage of opportunities by focusing on the following core priorities:

- For Penn State: Foster Loyalty to Penn State
- For Penn Staters: Provide Avenues for Personalized Engagement
- For Pennsylvania: Keep Higher Education Strong
- For LOVE: Leaders of Volunteer Engagement
- For the Future: Ensure the Continued Success of the Alumni Association

METHODOLOGY

Based on input from stakeholder feedback representing many constituencies served by the Penn State Alumni Association, Vision 2020: Powered by Pride is a working document that will be reviewed regularly and revised as needed to ensure that the Alumni Association remains nimble and responsive to the needs of alumni and the University. This process sought to include the voice of all Penn Staters in a variety of ways.

A program review and benchmark study was conducted by Grenzebach Glier and Associates (GG&A) to define and understand programs and practices currently in place. This study included a review of materials, data, and documentation from the Alumni Association, as well as on-site and phone interviews with 57 individuals, including University leadership, Alumni Association staff, alumni, University staff, and key volunteer leaders. Finally, they engaged 12 peer and aspirant peer institutions in a benchmarking survey. This process culminated with the delivery of a final report detailing all observations and recommendations.

All good strategic plans are grounded in solid market research. The Penn State Alumni Association retained the services of the Performance Enhancement Group, Ltd., a leading alumni market research firm, who conducted its Alumni Attitude Survey completed by more than 500,000 alumni at 230 universities and colleges over the last 15 years. More than 10,500 Penn State alumni responded to this survey, and our results were compared to a group of peer institutions and a national average. This is a statistically significant response rate.

In addition, the Executive Board of the Alumni Council appointed an ad hoc strategic planning committee that has played a crucial role in setting a vision, analyzing data, reacting and giving direction on presentations, and setting the direction of the planning document. Throughout this process, a series of planning sessions were conducted to allow staff and volunteer leaders to have significant input into the plan.

MISSION

To connect alumni to the University and to each other, to provide valued services to members, and to support the University's mission of teaching, research, and service.

VISION

WE ARE passionate about advancing Penn State Forever by engaging Penn Staters like you through all that you LOVE about Penn State!

VALUES

Building on the University values of integrity, responsibility, excellence, respect, discovery and community, the Penn State Alumni Association has identified **additional values** definitive of the Alumni Association's culture both internally and externally.

PRIDE, SERVICE, ENGAGEMENT, LIFELONG, CONNECTION, PASSION, NETWORK, LEADERSHIP, LOYALTY

Great brands are often associated with a singular defining word. At the Penn State Alumni Association, PRIDE emerged as a universal and unifying value for the Penn State alumni community.

PRIDE DEFINED

1. A feeling or deep pleasure or satisfaction derived from one's own achievements, the achievements of those with whom one is closely associated, or from qualities or possessions that are widely admired.
2. A group of lions forming a social unit.

Based on our research, we believe that Pride is THE word that defines how Penn Staters feel about Penn State and drives their involvement in the Penn State Alumni Association. Pride is the word that is most strongly associated with our brand. The dual meaning of pride also connects to Penn State in a unique way. The most powerful network of alumni in the world is the Penn State alumni network, the Pride! Pride also is complimentary and encompassing of two secondary values that emerged—community and network.

The Penn State Alumni Association is dedicated to cultivating a lifelong connection to Penn State and fellow alumni through service and engagement. When high school students consider the college decision, they often think about it in terms of the "next four years." Then, somewhere along the way, they realize that it is a lifelong decision; a decision that connects them forever to a network of people who share a common experience; a decision that is tied to the reputation and stature of their alma mater. Wherever they go and whatever they do, Penn State is part of them, and they are always close to a fellow Penn Stater.

The Alumni Association is the only organization that is tasked specifically with maintaining that lifelong connection with alumni.

The Penn State Alumni Association relies on leadership from our dedicated and talented volunteers and staff who share a passion for Dear Old State! Together, we uphold the tradition of excellence that Penn State is known for and harness the loyalty of our alumni.

PROGRAM PILLARS

What is the Alumni Association known for? The answer to this question defines our brand and the promise that we make to alumni and Penn State.

SPREADING THE GOOD NEWS OF PENN STATE AND HER ALUMNI

The Penn State Alumni Association is responsible for maintaining regular communications with our 658,000 alumni worldwide. Among our many publications and communications avenues, *The Penn Stater* magazine, *AlumniInsider*, and *The Football Letter* are favorites among our alumni.

SUPPORTING AND ENHANCING THE STUDENT EXPERIENCE

The decision to attend Penn State is a lifelong decision, and the best way to ensure that our students feel they are part of the Penn State family is by involving them from the very start. Our student leadership initiatives—Lion Ambassadors and the Blue & White Society—expose students to unique and meaningful experiences that connect them to Penn State forever. Our FastStart mentoring program gives students needed assistance right out of the gate, and sets them on the path for a successful Penn State experience.

BUILDING AND SUSTAINING LIFELONG RELATIONSHIPS

The Alumni Association is the only organization at the University specifically tasked with building and sustaining lifelong relationships with our alumni. The Alumni Association cultivates these relationships through our numerous volunteer opportunities and our diverse array of programs and engagements events.

HARNESSING THE POWER OF THE PENN STATE NETWORK

The Penn State Alumni Association serves one of the largest and most powerful networks of alumni in the world. The Alumni Association leverages this power through our robust network of affiliate groups and lifelong career services.

CELEBRATING ACADEMIC ACHIEVEMENT

At the Alumni Association, we are proud of the academic quality of the institution and are committed to increasing the academic stature of the institution. We celebrate academic achievement through our support of the Trustee Matching Scholarship program across all colleges and campuses; the Match Day ceremony in Penn State's College of Medicine; Graduate School and our societies on every campus and in each college

KEEPING TRADITION ALIVE

The Penn State Alumni Association is the torch bearer of tradition for Penn State. From traditional events like Rally in the Valley and Guard the Lion Shrine to away game Pep Rallies and myriad other events and activities, the Alumni Association generates and harnesses the spirit of Nittany Lions worldwide.

CORE PRIORITY 1

FOR PENN STATE: FOSTER LOYALTY TO PENN STATE

- 1.1** Position the Alumni Association as the Loyalty Program for Penn State
 - 1.1.1** Develop a suite of member Penn State-specific benefits through cross-campus partnerships.
 - 1.1.2** Create a communications infrastructure for people to track/share their loyalty to Penn State.
 - 1.1.3** Incentivize attendance, volunteerism, etc. across the entire Penn State community.
- 1.2** Develop a communications strategy that appeals to the reasons alumni love Penn State.
 - 1.2.1** Develop a message matrix, based on program pillars and market segmentation.
 - 1.2.2** Develop a pool of testimonials from members about their experiences and pride.
 - 1.2.3** Develop communications strategy aimed at current members to reinforce the value of Alumni Association membership, including a “Membership Matters/Powered By Pride” email campaign.
- 1.3** Maintain existing and establish new partnerships with University entities that enable alumni to benefit from their expertise and for these entities to benefit from the loyalty of alumni volunteers.
- 1.4** Continue to enhance the magazine’s coverage of Penn State strengths and areas of focus detailed in the University’s strategic plan.
- 1.5** Foster purposeful student and alumni relationships, engagement, and programs that build life long commitment to the University and an identity as a Penn State alumnus/a.

CORE PRIORITY 2

FOR PENN STATERS: PROVIDE AVENUES FOR PERSONALIZED ENGAGEMENT

- 2.1.** Increase participation and create engagement strategy to strengthen the bond between the Penn State Alumni Association and all generations of alumni and students.
 - 2.1.1.** Specifically develop engagement strategies that engage young alumni.
 - 2.1.2.** Create multi-faceted events for a more customizable event experience.
 - 2.1.3.** Create a variety of avenues that develop relationships among participants pre and post events.
 - 2.1.4.** Implement a tradition-keeper program for students and alumni.
- 2.2.** Build a digital engagement strategy to inform, involve, and excite Penn Staters and particularly young alumni and future alumni (students).
 - 2.2.1.** The Penn Stater magazine will continue offering interactive content in the print magazine, and explore creative ways of increasing interactive opportunities through social media.
- 2.3.** Explore a regional services model to serve and engage Penn State alumni where they live and work.
- 2.4.** Understand our alumni audiences to convey that we know them, they matter to us, and we enhance their overall Penn State experience (sophisticated data capture, metrics, analysis).

CORE PRIORITY 3

FOR PENNSYLVANIA: KEEP HIGHER EDUCATION STRONG

- 3.1.** Re-launch the Grassroots Network to reinforce purpose and inspire alumni volunteers around Penn State’s legislative priorities.
 - 3.1.1.** Boost understanding of and support for the Network through all Penn State constituencies.
 - 3.1.2.** Set up advisory panel of top Penn State administrators, student leaders, others to help shape, support, and implement Network initiatives.

- 3.2.** Increase awareness, visibility, and participation in the National Alumni Admissions Program (resources, education, storytelling, etc.)
- 3.3.** Develop a communication strategy/marketing plan for advocacy in collaboration with the Grassroots Network team.
- 3.3.1.** Enhance Network communications to boost knowledge of Penn State and build pride in its mission and accomplishments.
- 3.4.** Showcase Penn State's economic impact on the Commonwealth.

CORE PRIORITY 4

FOR LOVE: LEADERS OF VOLUNTEER ENGAGEMENT

- 4.1.** Develop systems to identify and recruit volunteers for all Penn State volunteer opportunities.
- 4.2.** Promote current and develop innovative volunteer opportunities for alumni and students.
- 4.3.** Increase engagement, communications, and support to the directors of alumni relations (DARs), Blue & White Society advisors, society members, and volunteers.
- 4.4.** Provide more support to our regional alumni chapters through additional fiscal, human, and technological resources.
 - 4.4.1.** Develop a program to eliminate chapter dues.
 - 4.4.2.** Provide additional staff support for chapter efforts.
 - 4.4.3.** Deliver technology solutions to help chapters connect with alumni and conduct e-commerce.

CORE PRIORITY 5

FOR THE FUTURE: ENSURE THE CONTINUED SUCCESS OF THE ALUMNI ASSOCIATION

- 5.1.** Develop a comprehensive market research program that assesses the needs of our constituency and consistently measures our net promoter score.
- 5.2.** Implement an Alumni Association-wide business intelligence platform that measures effectiveness of all marketing, membership, programs, and services offered.
 - 5.2.1.** Develop assessments that regularly measure the Penn State Alumni Association Net Promoter Score.
 - 5.2.2.** Develop executive and operational dashboards that track key performance indicators and visually expose changes in trend.
- 5.3.** Develop a methodic and prioritized approach to program formation, enhancement, and sun-setting.
- 5.4.** Develop a Memorandum of Understanding between Penn State and the Alumni Association.
- 5.5.** Evaluate and assess the bylaws of the Alumni Association and pursue reforms that align with best practices in association management.
- 5.6.** Evaluate and assess the current organizational structure and implement changes that best align resources with organizational priorities.
- 5.7.** Identify our strategic financial goals and develop plan to achieve them based on financial forecasts and projections.
 - 5.7.1.** Develop and document the annual budget process for the Penn State Alumni Association, and tie funding to this plan.
 - 5.7.2.** Continue to diversify the revenue stream of the Alumni Association.
 - 5.7.3.** Increase participation in our sponsorship program to bolster the financial returns.
 - 5.7.4.** Continue to recruit and retain the best staff to support the programs and initiatives of this strategic plan and the Alumni Association.

KEY METRICS

MEMBERSHIP

- # of members
- retention rate

EVENT AND PROGRAM PARTICIPATION

- Alumni Engagement
- Parent and Student Engagement

NET PROMOTER SCORE

- Events
- Membership
- Readership

REVENUE

- Membership
- Corporate Sponsorships/Affinity/Advertising
- Sustaining Pride
- Philanthropy to the Penn State Alumni Association

SOCIAL MEDIA

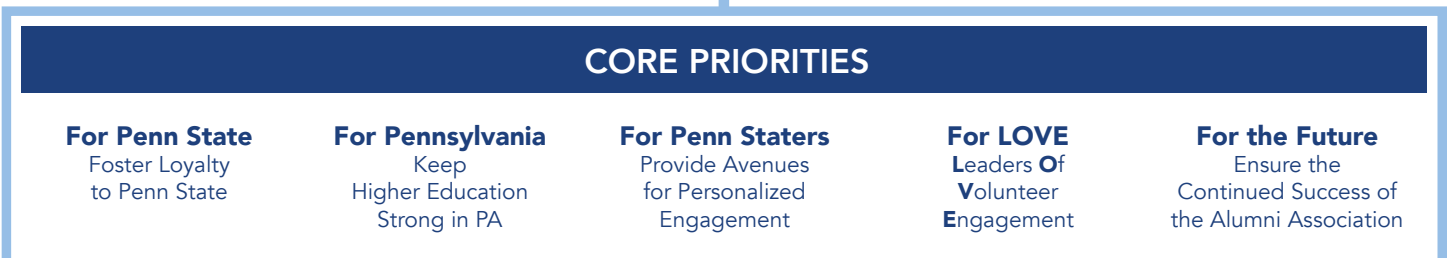
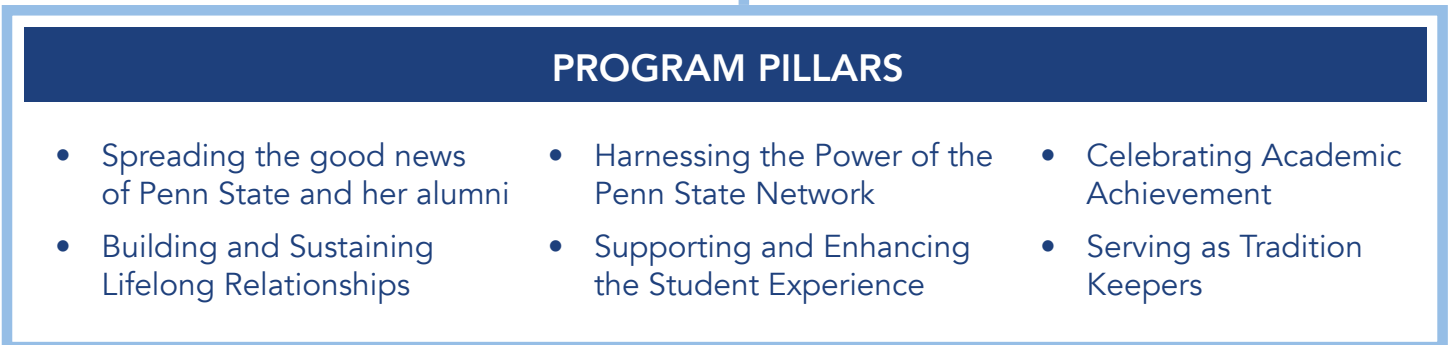
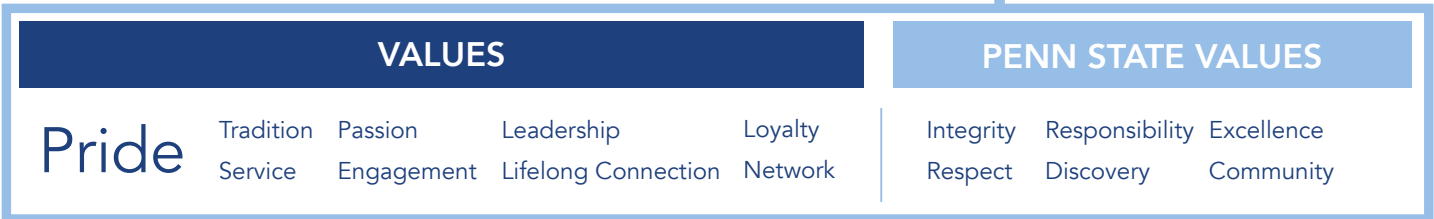
- Facebook Followers
- Twitter Interactions
- Instagram

WEB TRAFFIC

- Site visits
- Email opens
- Email clicks



THE MISSION of the Alumni Association is to connect alumni to the University and to each other, to provide valued services to members, and to support the University's mission of teaching, research, and service.



WE ARE
passionate about
advancing
Penn State Forever
by engaging
Penn Staters like
you through all
that you LOVE
about Penn State!



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