



ASSOCIATION OF YALE ALUMNI
THE STRATEGIC PLAN

AMBASSADORS FOR YALE: THE AYA STRATEGIC PLAN

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ASSOCIATION OF YALE ALUMNI

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AMBASSADORS FOR YALE: THE AYA STRATEGIC PLAN

ALUMNI RELATIONS AT YALE – RESPECTING THE PAST AND EMBRACING THE FUTURE

For an institution that measures its history in centuries, an organization that traces its formal roots only to the beginning of the 1970s – that is, the Association of Yale Alumni (AYA) – may seem “youthful” indeed. Despite its relatively short history, the AYA has made tremendous strides in the last three decades to provide programs and services of value to the alumni community. These efforts, of course, stand on a tradition of alumni engagement that dates back to the late 18th century when Class Secretaries began compiling class address lists and biographical records and planning class events.

It was in late 1971 that the Yale Corporation approved the establishment of the Association of Yale Alumni. At its heart, the AYA is fundamentally about serving and engaging alumni and advancing the needs of the institution. As Yale becomes truly global in its reach, influence, and impact, the opportunities to engage and interact with alumni around the world are unprecedented.

In the summer of 2006, the AYA launched a strategic planning effort designed to guide the Association in the next five years to create more ambitious programs that will both serve alumni more successfully and also engage them more effectively in service to Yale. As part of the planning process, we have worked to:

- examine our core values, mission, vision, and goals;
- identify those activities, programs, and services that will be valuable to members of the alumni community;
- identify and embrace the strategic directions that will better serve alumni needs; and
- identify and exploit opportunities for service to Yale in its fourth century.

This planning process was spearheaded by Mark R. Dollhopf '77, the fifth executive director of the AYA and Board of Governors Chair Susanna Krentz '80. A planning retreat involving the members of the Board of Governors, as well as Vice President and University Secretary Linda K. Lorimer '77 JD and the AYA staff, was among the first steps in the process. That first productive brainstorming weekend led to numerous discussions with alumni stakeholders – including a series of focused sessions with front-line volunteers at the November 2006 AYA Assembly, as well as more in-depth planning activities with the AYA Board. Consultation with campus partners (e.g., the Secretary's and Development Offices), intensive staff discussions, and a benchmarking exercise designed to get a sense of effective programs and services offered by our peer institutions have also been key features of the fall and early winter 2007.

In the following pages, we have set forth a framework for the AYA – goals, strategies and projects – that builds upon what has collectively been accomplished in the last 35 years and shares our vision for the next five.

INTRODUCTION

Over the past 35 years the Association of Yale Alumni has been incrementally broadening its vision. In the last decade in particular, the AYA Board of Governors and the staff have been innovators, moving the organization beyond its inherited structures.

- The AYA has moved from a focus almost exclusively on the College's graduates to a recognition that the AYA should serve *all* graduates – we now mail the *Yale Alumni Magazine* to Graduate and

Professional School alumni, stage reunions for departments in the Graduate School, and have an AYA Board of Governors with 12 Graduate and Professional (G&P) School alumni among its 26 members.

- We have moved from an almost exclusive focus on Clubs and Yale College classes as the only modes of AYA engagement to a recognition that Shared Interest Groups (whether women, African-Americans, singers, *Yale Daily News* alumni, actors, etc.) should increasingly be a focus for the Association's work.
- We have emphasized more clearly our primary role in serving as many alumni as possible even as we provide staff support to the volunteer leaders. The elimination of the second annual Assembly for the same cohort of alumni leaders and its replacement with other programs for differing groups of graduates each year is just one example.
- The AYA has embraced new technology in many ways ranging from the online directory, the Career Network, and an electronic ELine newsletter even as we have realized that there is so much more we could and should do if staffing were made available.
- In some cases, traditional club and class structures are not always the best vehicles for a growing number of older Yale College graduates and we recognize that new modes of engagement, particularly for younger graduates, must be created. For example, the regional *Connect with Yale* programs piloted in 2005 and 2006 have proved to be very popular and highly successful.
- We have been reorganizing the AYA from being a mere provider of services to an organization designed to call alumni to service – that is, motivating and inspiring alumni to serve Yale.
- The AYA has embraced projects that enlist alumni to contribute to a priority identified by the University, such as assisting Yale College with the development of summer internships.
- The AYA has moved philosophically from an “all or nothing” mentality (where we used to draw hard lines between programs we ran exclusively and those sponsored by other alumni groups where the AYA contributed nothing) to a recognition that the AYA's limited resources can be stretched and our mission advanced by often being a subordinate (but key) contributor. Conspicuous examples were the *Yale Daily News* reunion and the recent Glee Club reunion.

Limited staffing and funds have been the major impediments to expanding in every dimension described above but we should also admit that a certain caution and reliance on historic patterns have been at work.

The University administration has an increasing sense of the importance of alumni relations – and the AYA's potential to serve our alumni and facilitate ways for alumni to serve Yale. The addition of the AYA Executive Director to the President's Council of Deans and Directors is more than symbolic recognition of the AYA moving into a greater position of institutional leadership. The special funding for the new regional programming and for sending the alumni magazine to G&P graduates are also examples of this increased support and greater engagement. But we need to remember that for many years, the AYA did not enjoy a prominent and distinct position in the University planning, prioritization, and funding process.

WHY CHANGE IS URGENT

Volunteer Time is Precious

The *time* that alumni contribute as volunteers is precious, and more often than not it is not used wisely. At a recent Yale Club dinner the president of a Club (a distinguished faculty member of a peer institution) remarked that although he was having a good time serving as president, he was tired and ready to pass the job to someone else, commenting that he had spent fifteen hours the prior week taking dinner orders on the phone, “*I’ll have the chicken, please.*”

Truth is, he was not tired of the position, he was tired of the *job*. Volunteers of today are different than volunteers of just a decade ago; their needs and expectations are changing at a dramatic pace. They seek active and participative engagement with their nonprofit organizations in mission fulfilling activities, not clerical or administrative tasks. Volunteers are more and more concerned with the *impact* of their gift of time, and they want opportunities that resonate with their personal and professional interests and talents.

To inspire alumni to greater service, to motivate them to lead, we must give them appropriate counsel, administrative support, and technical tools. We cannot afford to have our volunteers “learn on the job” or be consumed with administrative work – they will become frustrated and burn out, and we will lose them to other nonprofits that can engage them more strategically. While we may not be in a position to eliminate entirely the administrative aspects of every volunteer’s job, we can lessen that burden with new tools and greater support.

If we take care of our alumni, they will take care of us.

Volunteer Talent Can Make an Increasingly Important Contribution to the Success of Yale

As a leading international university in a changing world, Yale’s needs are expanding. The University has the opportunity to leverage the rich talents and expertise of alumni to an unprecedented level by engaging them in many more ways on projects of interest to Yale and to the alumni themselves.

Volunteer *talent* is abundant. Yale has some 4,000 alumni providing volunteer services – more than 3,000 of them serving on boards and advisory groups representing organizations as diverse as the Corporation, the University Council, 180 Yale Clubs, 65 classes, the *Yale Tomorrow* Campaign, the Alumni Fund, the AYA, the Graduate School Alumni Association, 12 Professional Schools, the Admissions Office, the Libraries, Galleries and Museums, 22 athletic teams, and innumerable other affinity groups. The goal now is to mobilize most effectively our volunteers in ways that excite them and advance the institution.

The University seeks *ambassadors*, alumni leaders who share its vision, values, and priorities – ambassadors who can be instrumental in promoting the University, enhancing its reputation, recruiting the best students, and energizing other alumni, thereby ensuring its place among the best of world universities.

We cannot count on volunteers to appear serendipitously on the scene when needed; Yale must be intentional in recruiting and developing the right volunteers for the right jobs, and recognizing them appropriately for their accomplishments.

Volunteer Treasure Will Follow

Last but not least, engaging the hearts and minds of alumni in volunteer activities inspires greater giving. While the AYA is not responsible for *fundraising*, it is, in the broader sense, a strategic partner in *development*. Numerous university studies have demonstrated that significant gifts are much more likely to be made by those alumni who participate in alumni activities over many years. But financial giving is only one measure. The gifts of time and expertise are contributions that are increasingly valuable treasures for graduates to offer in an era of increasing demands on all of us.

The MIT Giving/Engagement Study of 2002 concluded that graduates engaged in alumni association activities demonstrated greater participation in giving, were more consistent in their giving, and were far more likely to give larger gifts. MIT examined the giving of those who attended reunions, volunteered (e.g., alumni interviewers), or belonged to a regional MIT Club. Their findings:

Participation: Those who attended reunions were 30% more likely to give to the Alumni Fund; those who volunteered in some capacity were 20% more likely to give; and Club members were 13% more likely to give.

Consistency: Involved alumni were 1.4 to 2.1 times more likely to give four or more years out of every five.

Size of Gift: Involved alumni were two to six times more likely to make cumulative gifts of \$2,500 or more over five years, with even stronger correlations at \$25,000 and greater levels.

Alumni are demanding more of the AYA, and the AYA Board of Governors has ambitious plans to meet that demand. Information gathering and brainstorming sessions have been conducted over the past year with the AYA Board and its committees, delegates to the 2006 AYA Assembly, the AYA staff, and the staff of the Office of the Secretary. A summary of the findings:

1. Alumni seek greater ways to serve Yale and be served by Yale that vary by age group (retirees versus young alumni) and by situation (clubs versus shared interests). One-size-fits-all will no longer suffice even for clubs and classes.
2. They have differing needs and expectations – connection to the educational heart of the university; the opportunities for service to an institution that was formative in their lives; the chance for networking and association with one of the preeminent institutions in the country; and occasions for fun as well.
3. They expect better staff support and the technological tools to make association easy.
4. They want to see the much discussed shared interest groups (SIGs) be enabled and flourish. We need to recognize and support these groups so that their mission and purpose is in alignment with University priorities.
5. They want programs that meet their interests – not what we guess those interests to be. Many AYA programs are launched with the attitude “build it and they will come.” We need more consultation with alumni (“market research”), along with product and service testing, to ensure that we are meeting the demands and expectations of our alumni in a measurable fashion.
6. Alumni accustomed to success in their own careers want to be accountable for results in their volunteer activities. The AYA must develop goals and standards to ensure that all organizations – classes, Clubs, the Graduate School Alumni Association, and SIGs – are growing, meeting the needs of their constituents, and being good stewards of the resources, human and financial, entrusted them.

What Are Other Universities Doing?

As part of the strategic planning process, seven peer institutions, those considered to be among the best in the field of alumni relations were benchmarked – Berkeley, Cornell, Harvard, Michigan, North Carolina, Princeton, and Stanford. AYA Executive Director, Mark Dollhopf visited all of these universities. Most of these institutions, particularly those *outside* the traditional Ivy League, are investing significantly in innovative and ambitious programming. For those institutions not directly supported by their own endowment – those outside the Ivy League – their university subsidies are two to five times that of Yale. Several have

endowments of their own, with the requisite permission to fundraise. Funding tied to endowments has increased at a rate commensurate with growth in the endowment (due to fundraising and investment growth) – a far greater rate than funding tied incrementally to general university budgeting allocations.

Some examples of these institutions' ambitious programming:

To attract families and young alumni, the University of Michigan Alumni Association owns and operates "Michgania," a camp and conference center. Over 8,500 alumni and families participate in an eleven-week summer program, additional alumni participate in fall and winter weekend retreats. Stanford and Berkeley have camps and conference centers as well, attracting 7,000 and over 11,000 participants respectively. In a similar fashion Cornell's Adult Univeristy draws thousands to both on and off campus programs.

All of the institutions outside the Ivy League invest substantially in marketing and research, developing and testing new services and products – ranging from the sale of wine and food products offered by companies owned by alumni to the co-sponsoring of events like *Sesame Street Live* and the *Radio City Music Hall Rockettes*.

There have been dramatic increases in reunion activities – although Princeton's reunion model of "every class, every year" is an old one, it is being emulated in various new formats, from cluster reunions (gatherings of multi-year groups in on or off campus venues) to reunions for all classes up to the fifth (events for one, two, three, and four year classes), in addition to the fifth, tenth, fifteenth, etc.

Most of the institutions are beginning to centralize support services for their regional clubs, assisting the local volunteers with more vigorous event planning, communications, and marketing, not to mention the Web tools necessary to create effective online communities. All of these activities, of course, require substantially more staffing, and these institutions are "gearing up."

MISSION

At the founding of the AYA in 1971, the mission, or as it was then called, the “major objective,” of the AYA was to “develop more meaningful participation by Yale alumni in her affairs.”¹ In more recent years the implicit mission has been to connect and reconnect alumni to the University. It has become increasingly clear that “reconnecting alumni” is not an end in itself, but rather a means. The question then, a means to what?

Alumni represent significant human capital that can be tapped to make greater contributions to advancing Yale. And Yale’s mission of educating leaders for all sectors of society can be extended by engaging alumni more intentionally and ambitiously throughout their lives.

The AYA fosters lifelong connections to Yale, both to serve our graduates and to enable them to be effective contributors and ambassadors for Yale.

GOAL ONE

To expand educational opportunities by (1) enhancing existing programs, (2) creating new ones, and (3) increasing use of new media.

Yale’s mission is to educate, and our brainstorming sessions with alumni have confirmed that alumni want to take advantage of Yale’s remarkable physical and faculty assets. These programs must be convenient to access and must have compelling content.

Yale’s educational travel programs are considered among the most successful in the industry, yet they are expensive and have been primarily focused on the foreign travel tour model developed in the 1980’s. In any given year, only 1,100 (out of 150,000) alumni participate. We must provide greater access – through more diverse offerings and also different price points.

The Yale Alumni Chorus (YAC) is an example of a successful mix of mission-driven activity, exciting destinations, and educational content offered at a reasonable price. Average attendance on a YAC tour is well over 200, and the organization is now averaging one major tour abroad per year, having expected to produce only one tour every three years.

Such a model can be used for Dwight Hall alumni (or, for that matter, regional Yale Clubs or classes) to engage in service projects around the world; athletic team alumni to bring “American” sports to developing countries; nursing alumni to staff women’s clinics in Nicaragua; engineering alumni to build water treatment facilities in Africa, *Daily News* alumni journalists to teach ethics in emerging political systems...the list is as long and diverse as the imagination. These could be done in conjunction with current students.

Our educational initiatives to date have been “one size fits all,” but many universities are aiming such initiatives at specific demographic groups. The most striking of these are the family camp and conference centers run by Michigan, Berkeley, Stanford, and North Carolina, among others.

“Michigania,” the University of Michigan camp in the Upper Peninsula, draws over 11,000 participants yearly in one-week programs offering faculty lectures, experiential learning, sports, drama, music, and host of other family-oriented activities. It has worked so successfully, the University has launched an additional camp in the Adirondacks, and is planning one for the West coast.

¹ Frederick P. Rose, open letter to all alumni on the occasion of the first AYA Assembly, October 1, 1973.

Many of our alumni, faculty, and administrators have participated in high-level educational networking events such as the Aspen Institute, Davos, Renaissance Weekends, and the Bohemian Grove (a unique combination of high-level networking *and* camp). The AYA Board and key Yale faculty members have shown considerable interest in creating some variation for Yale alumni. Such a conference could dovetail with Yale's internationalization efforts by engaging World Fellows in alumni summits.

Whatever the idea, we need to build a much more expansive set of educational programs that respond to alumni interests and passions.

Strategy 1.1

Make our existing Yale Educational Travel (YET) programs more successful, and include more diverse programs. Also add a Yale update as an expected component of all YET programs.

Yale was a pioneer in introducing international travel programs for its alumni, with faculty offering "mini-curricula." The programs have become important sources of annual revenue for the AYA's operating budget. But the intellectual programs by faculty have been consistently applauded only by a small, albeit loyal, cohort of alumni who can afford the programs. The leadership of the AYA in the late 1980's and early 1990's refused to entertain travel programs that involved *alumni* as teachers, or that experimented with formats other than symposia abroad. We want to change those assumptions.

The AYA can have a much more exciting set of programs that will appeal to a broader set of alumni including younger alums, graduates with families, and those who want a service vacation (see below). Also, every Yale travel program should include a session on "Yale today" that offers an update similar to what President Levin offers to Yale Clubs. We need to ensure that our graduates leave these special trips with a clearer idea of Yale's priorities and current achievements.

Projects for the next five years

- 1.1.1 The Yale Educational Travel (YET) programs are an important source of revenue for the AYA's annual operating budget, and the programs receive enthusiastic reviews by alumni. But we can and should be more creative; we should explore shorter trips that are attractive to working professionals who can afford to take a week and two weekends away but not longer. Our goal is to increase the number of YET programs and participants with more diverse program offerings (especially in experiential travel) from 1,100 to 1,500 travelers and from 45 to 55 programs annually.
- 1.1.2 Ensure that every travel program offers an update about Yale so that the participants are equipped to be more effective ambassadors.
- 1.1.3 Create educational traveler ambassadors – frequent volunteer travelers who assist in welcoming new participants, greeting all travelers, hosting trip reunions, communicating group experiences, and promoting the YET experience to other alumni. Develop a training program and manual for volunteer traveler leadership.
- 1.1.4 Engage alumni living abroad, or working with exciting projects abroad to increase the number of "unique" features for our travel programs. For example, a special briefing about the Latin American economic situation by a graduate who was Minister of Finance of Mexico for an AYA trip to Latin America.
- 1.1.5 Assess alumni interests for particular travel programs; undertake marketing and research initiative. (See Marketing below.)

- 1.1.6 Conduct vendor-sponsored receptions at reunions and at the Yale Club of New York to promote our travel programs.
- 1.1.7 Produce promotional travel DVDs for distribution on the Web and at receptions.
- 1.1.8 Experiment with strengthening traveler bonds with more frequent trip reunions hosted on campus and at participant homes or other off-campus locations.
- 1.1.9 Increase the number of faculty-designed programs.

Strategy 1.2

Produce “mission” and service-driven tours to motivate and inspire alumni.

Projects for the next five years

- 1.2.1 Pilot a set of service travel programs. The first will be a Yale service tour to the Dominican Republic in the spring of 2008 to help rebuild a village and conduct medical clinics in a poor and developing area. Going forward, these will be coordinated with the Yale Office of International Affairs to focus on countries/projects/areas of institutional priority. Inspire various University constituencies (e.g., Dwight Hall) to offer service-oriented trips, and support their efforts to spearhead volunteer-led mission trips. Work with organizations to discern mission, purpose of the trip, and alignment with Yale priorities.
- 1.2.2 Hire a Staff member to direct mission/service programs.
- 1.2.3 Explore service activities in New Haven to provide lower cost opportunities, aimed primarily at younger alumni.

Strategy 1.3

Deliver more of Yale’s educational treasury to alumni using new Web-enabled vehicles.

The University recognizes that the Internet and new media offer remarkable opportunities to “broadcast” Yale’s educational treasury. Alumni are eager to access Yale lectures and courses via Netcasts or Podcasts. We know that the President and Provost are committing additional funds to staff a new small office and build an impressive Yale Netcast/Podcast library. We urge the Yale administration to work with the AYA to identify Netcast projects that are high priorities for alumni.

Projects for the next five years

- 1.3.1 Request the Yale Administration to articulate its strategic plan for broadcasting more Yale educational programming over the Web (via Netcasts/Podcasts or otherwise).
- 1.3.2 Work with Yale’s Secretary to ensure alumni interests are reflected in the scope and scheduling for lectures, programs, and concerts online.

Strategy 1.4

Assess the interest for more family-oriented programming and develop initiatives accordingly.

Projects for the next five years

- 1.4.1 Engage alumni with families more regularly by launching a task force of volunteers and staff to determine what programs are desired. In doing so, we should explore the concept of an “*AYA Family Camp and Conference Center*.” Attend peer university camps to investigate programs and develop a best practices model.

Strategy 1.5

Launch a task force of volunteers and staff to explore the interest in a “*Fourth Century Yale Forum*” – a high-level educational initiative, similar to the Aspen Institute, that is directed to Yale graduates.

In the last two years, alumni who have attended Renaissance Weekends or the Aspen Institute have suggested that Yale graduates might particularly enjoy some variation of those interesting programs that are directed solely at Yale alumni. These may be interwoven with programs developed by Shared Interest Groups.

Strategy 1.6

Market living and retirement in New Haven for alumni to take fuller advantage of Yale in an ongoing way and contribute to Yale and New Haven more substantially.

Strategy 1.7

Create additional conference offerings, moving from one Spring Conference to multiple events inspired and desired by SIG groups.

The experience of working with SIG groups and discovering the most popular programs that generate the most interest has demonstrated a need to produce sustainable, affordable events – ones that can be revisited on a periodic basis. The Women’s Conference is an example.

Projects for the next five years

- 1.7.1 Determine appropriate SIGs for Conference programming, research appropriate content, and build attendance through volunteer engagement and leadership.

Strategy 1.8

Explore the possibility of a *National (or Global) Yale Service Day* - a one-day event, bringing together all Yale Clubs, classes, G&P associations, and shared interest groups in service projects launched and managed in their local communities.

Projects for the next five years

- 1.8.1 Recruit volunteers from among those groups already inspired and motivated by the concept. Establish a task force of alumni representatives from clubs, classes, G&P associations, and SIGs to determine scope, scale, and timeline for the event.
- 1.8.2 Determine appropriate communication, enrollment, and tracking procedures, and allocate necessary staff resources and support.

GOAL TWO

To provide an increasing array of services that support alumni.

In the last decade, the AYA has worked to develop a set of services that support alumni. They range from the Yale Career Network to an on-line alumni directory to a credit card program that had particular travel features when it was introduced. During the consultation process with other universities last fall, we learned that some sister institutions have a much more developed set of services that ranged from “Welcome to the community” for graduates who relocate to a new city to insurance and rental car programs. Others offer alumni greater access to university library resources. These services are a tertiary objective of alumni relations, but they are ways to signal that the University cares and they link graduates in multiple ways to their alma mater. We must explore what additional services would be of value to our alumni.

Strategy 2.1

Study the feasibility of offering wider access to Yale’s Library, even at a fee.

We recognize that existing master licenses that allow access to on-line library sources are limited to use by current Yale students, faculty, and staff. We are aware that some universities have negotiated to give graduates – or at least a limited number of graduates – access to some of these resources. We will ask the University Librarian to further explore this possibility.

Strategy 2.2

Renegotiate the credit card arrangements to continue this important revenue source and provide Yale graduates with access to a program with distinctive strengths, like the unique travel opportunities in Yale’s initial credit card program.

Strategy 2.3

Have a task force determine what services are most desired by some graduates (e.g., career services; cultural discounts; rental cars) and negotiate to achieve special benefits.

Strategy 2.4

Undertake an ambitious communications and sign-up program to increase graduates’ participation in the on-line Career Network. Communicate its advantages aggressively.

GOAL THREE

To enable the best of Yale to be the best for Yale, we will create the right structures and tools for the right alumni for the right projects.

We need a transformational re-envisioning of how we engage with alumni. For the historical structures of Clubs and classes, we need to change drastically to recognize the differences among them. The class and club leaders should be responsible for determining and articulating an overall vision, setting goals, managing expectations, inspiring participation through engaging communications and personal contact, and raising the human and financial resources to meet the needs. In other words, they should be empowered to lead, not

burdened by *administrivia*. And we need to embrace Shared Identity and Shared Interest Groups as an incredibly powerful way to connect graduates across Schools, as well as the College, to Yale.

Alumni who are successful – in whatever endeavor – are accountable for their results. But leaders must have the proper administrative support and tools to be accountable. Most nonprofit institutions of today have moved from a model where volunteers do everything, to a model where a professional staff contributes significantly to the day-to-day, routine functions of the organization. Indeed, over the past number of years the AYA has been reaching out to our classes – once completely independent entities producing reunions on their own – to provide more administrative support and services. Specifically, we help class leaders 1) develop reunion strategies by sharing best practices, 2) coordinate all event planning with campus dining services, facilities, and transportation companies, 3) schedule faculty lectures, 4) arrange for tours and demonstrations, 5) suggest and produce effective marketing and communication pieces, 6) manage registrations and their books, 7) help solicit dues, and 8) assist with various non-reunion events. We need to do as much for clubs and SIGs.

By contrast, our 180 regional Yale Clubs are separate organizations, led by 2,000 volunteers, but supported only by five AYA professional and support staff based in New Haven. Other than sharing best practices, scheduling faculty visits, and helping to coordinate a few events a year, the staff is unable to offer much strategic or organizational counsel much less direct administrative support.

Yale's shared interest groups – e.g., women, black, Latino, Asian-American, Native American, LGBTQ, *Daily News*, singing groups, athletic teams, to name but a few – are simply underserved by the AYA's *one* part-time staffer. In 2007 alone numerous of these groups were refused, or offered extremely limited, assistance with reunion planning or their efforts at organizing even nominal activities.

We need to follow the example we set for ourselves with class support, and build the staff and technical infrastructure to offer similar support to Clubs and affinity groups.

Strategy 3.1

Develop a tiered Yale Club volunteer support model based on population distribution, not geographical representation, to invest appropriately and to support our Yale Clubs. Provide all Clubs with new Web and e-mail management tools and invest properly in additional management services for the largest Yale Clubs.

Currently, all Yale Clubs receive the same level of support from New Haven. Currently a club trying to manage the affairs of a potential alumni population of 10,000 will not receive substantially more support than a club with 100. To ensure that all Yale alumni have ample opportunities to take advantage of Yale programming, the AYA has to tier its administrative and support proportional to the number of alumni served. Volunteers in the largest Yale Clubs need considerably more assistance and staff support to be able to deliver programming to thousands of alumni demanding more frequent and larger events than to those Clubs serving many fewer alumni.

Projects for the next five years

- 3.1.1 Develop for all Yale Clubs basic online tools, including online membership marketing, event registration and fee collection, membership directory, blast e-mail capability, newsletters with local and overall Yale content, and creative Web site services including templates, design, and RSS.
- 3.1.2 Designate **Large Population Clubs** (six metropolitan areas outside of New Haven that each have between 3,500 and 13,000 graduates, representing 44,018, or 35% of alumni). They include the New

York area, Washington D.C., Boston, San Francisco, Los Angeles, and Chicago. We need to provide services to these Clubs including active program counsel, administrative support, and on-site event management. An AYA Volunteer Program Officer assigned to the Club President would attend at least one Club board meeting per year. Administrative support would include mailings, newsletters, and bookkeeping. Event planning staff would manage two to five events per year (or as needed), including visits from top Yale administrators, Graduate and Professional School Deans, and Shared Identity Group events with Yale faculty. In addition, the staff would work with the volunteer leadership to create the “tailored” programs that will be successful for the city such as family events, young alumni events, etc. Explore *Connect with Yale* programming every two to three years. Goal: increase participation at these large Clubs by 100%.

- 3.1.3 Designate **Medium Population Clubs** (54 total Clubs of 500-3,500 graduates representing 34,103, or 24.99% of alumni) and provide one-on-one program counsel and more limited administrative support. Assign an AYA Volunteer Program Officer to the Club President to help develop and recommend (but not directly manage) event planning (minimum of two events per year), including Yale faculty visits, arts/music programming, family activities, outdoor events, and prospective student programming. Goal: increase participation by 25%.
- 3.1.4 Designate **Small Population Clubs** (87 total Clubs of fewer than 500, representing 19,163, or 14.04% of alumni) and provide active program counsel from the AYA office. While administrative support and event planning services must be limited, these Clubs would still be provided with basic online tools to help them manage their events, and Club leadership would be encouraged to attend the AYA Program for Leadership workshops. Goal: increase participation by 15%.
- 3.1.5 Identify strategically important **International Clubs** (10 active Clubs of 100-1,200 representing 9,161, or 6.71% of alumni) and provide active program counsel from the AYA office, leadership workshops, and additional services as appropriate. Goal: Establish regular programming and communities in each of these Clubs.

Strategy 3.2

Make the establishment of Shared Interest Groups (SIGs) a priority and offer volunteer leaders organizational counsel and administrative support at levels similar to classes and Clubs.

Traditionally Yale has grouped alumni according to age (class year), geography (Yale Clubs), or Yale degree (G&P). Our support and organizational structure has been geared to those groupings, centered principally on reunions and other class-based activities, as well as Yale Club activities. But alumni are coming together in networks and associations unbounded by age or geography, and the AYA has been able to provide only the most modest amount of support. The Yale Glee Club Associates recently celebrated the 145th Anniversary of the Glee Club with over 600 alumni present – a tremendous turn-out. The sheer number of returning alumni speaks volumes for the capacity of these groups to reconnect alumni to Yale.

While organizations like the Glee Club Associates have the necessary administrative staff to support reunion events and other special programming, most of our SIGs do not – that is if they are even organized at all. In 2004 the AYA’s Spring Conference, “In the Company of Scholars: Yale Women in a Changing World,” attracted more than 300 alumnae; participants were enthusiastic in their evaluations and willingness to reconvene. But because there is no formal women’s board or advisory group specifically representing the interests of our alumnae, and because the AYA has only one part-time staff person to coordinate many other SIGs, there has been little follow-up to an otherwise successful event.

The SIGs fall into two major categories – Shared Identity (gender, race) and Shared Interest (which can address passions like singing to professional interests like real estate). Some episodic efforts have been undertaken to support African American alumni and women graduates, but the AYA has not been able to support regularly these or other Shared Identity Groups. Some Shared Interest Groups have flourished without AYA assistance, most conspicuously the Yale Alumni Chorus and the Whiffenpoofs. But there are so many obvious groupings. A group of graduates in the real estate industry have associated in recent months, and Yale entrepreneurs in California are eager to affiliate. We need to determine how to support these various groups and develop a tiered approach not unlike the approach for geographical areas.

Projects for the next five years

- 3.2.1 A framework that articulates the priorities of, and support for SIGs must be developed first. We must determine an appropriate protocol to recognize and certify SIGs on an ongoing basis. This work will be addressed by the SIG Committee of the AYA Board in conjunction with the officers of the University. Not every affinity group can be supported and some of the larger and potentially most significant SIGs will need to be supported to a greater degree.
- 3.2.2 Develop an approach for key Shared Interest Groups and determine the magnitude of administrative support needed for the key areas including the number of program officers needed to manage their affairs.
- 3.2.3 Develop programs for the key Shared Identity Groups with an initial focus on buttressing efforts underway by African-American and women graduates.
- 3.2.4 Selectively offer active program counsel, administrative support, and event management to the largest, or most strategically important, SIGs, similar to the tiered club model concept as described above. An AYA Volunteer Program Officer assigned to SIG leadership would assist these groups in mission discernment, governance, communication, planning, and fundraising; and would be expected to attend at least two or more SIG board meetings per year, or as needed.
- 3.2.5 We will be opportunistic in our outreach to support SIGs that have reach momentum and alumni support. We will then ensure AYA support for the key SIGs, to include event planning, visits from top Yale administrators, the coordination of faculty presentations, and bookkeeping as appropriate. Provide all SIGs access to the basic online tools offered to Clubs and classes. Goal: increase participation in SIG events to 1,000 alumni per year.
- 3.2.6 For Shared Interest Groups that are already operating well, furnish at least a University update for their major sessions.

Strategy 3.3

Create stronger lifelong institutional ties with young alumni by bringing them together earlier, more often, and in ways meaningful to their generation.

The young alumni of today (10 years or less from their graduation) are far more diverse than previous generations. They are ethnically more diverse, arise from different economic circumstances, represent both private and public schools, and hail from all parts of the globe. They choose to relate in diverse ways, not necessarily at the “Downtown Club.” Having been raised and educated on the Internet, they are in constant networking mode, connecting more immediately and spontaneously than previous generations. When they do come together, they often prefer activities that are purposeful, driven by a desire to help others.

Projects for the next five years

- 3.3.1 Develop young alumni events in all of the large population geographic markets.
- 3.3.2 Bring young alumni back early and often to establish positive growth for subsequent five-year reunions. Other universities (most notably UCLA) are bringing the one-, two-, three-, and four-year alumni back to campus for well-attended reunions (as well as inviting the current seniors). Yale's own evidence predicts such success: our best attended reunions now include the 5th and 10th. By 2011 we would like to have an event for each of the first five graduate years.
- 3.3.3 Work with class leadership to design appropriate service and activity-based events in the New Haven area, offering them in addition, or as an alternative, to the social reunions. Although certainly popular, not all young alumni events need be the traditional "wine and dine" party reunions. Young alumni also intentionally seek out opportunities to be of service, whether in New Haven or regionally.
- 3.3.4 As indicated above, the AYA will position a Young Alumni Volunteer Program Officer to work not only with class leadership, but also Club and SIG leadership to develop activities and initiatives that engage young alumni.

Strategy 3.4

Inspire students to a life of leadership, service, and continuing education through early exposure to the activities of the AYA.

We need to introduce students early to the tradition of service by alumni to Yale to prepare them (and excite them) to be engaged volunteers and contributors. Envisioning "life after Yale" also represents a major challenge for students. The AYA can help students meet that challenge by reassuring them that Yale will not forget them – that the AYA will work hard to create a sense of community among their classmates, to provide continued access to Yale's educational resources, and to develop a network of alumni support upon which they can rely throughout their careers.

Projects for the next five years

- 3.4.1 Develop and design a four-year progressive leadership development strategy for freshmen, sophomores, juniors, and seniors, introducing them to the various services and activities of the AYA through research projects and clerking at reunions and other alumni events.
- 3.4.2 Create two service project opportunities per year pairing current undergraduate classes with alumni classes to break down the perceived barriers between alumni and students; have residential colleges invite alumni back to campus for mentoring.
- 3.4.3 Develop AYA alumni in residence – Rose Alumni House Fellows – to mentor current class officers and leaders in class programming and engagement.
- 3.4.4 Determine if the Banner is appropriate to the mission of the AYA and explore the possibility of moving the student yearbook operation to the Dean's Office, which largely determines the size and scope of the marketing efforts. Current services offered by the AYA for students might be more effectively managed by other departments.

- 3.4.5 If financially feasible we should increase the number of students served through the innovative Bulldog Internship program, strategically placing them in Yale Clubs appropriate to alumni population and resources. The Bulldogs program currently provides over 100 regional internships per year, but grant monies are due to expire at the end of fiscal year 2008, placing the program at risk. We must determine the most effective financial model working in collaboration with the Yale College Dean's Office and the Office of Development.

Strategy 3.5

Expand the structures for the Graduate School's alumni base. Promote greater awareness, sense of community, and commitment to service among alumni of the Graduate School by increasing communications and conducting more frequent reunions, conferences, and receptions, with greater volunteer involvement.

In 1999 the AYA took up the challenge of conducting departmental reunions for the Graduate School as part of our ongoing effort to serve all alumni. But the Graduate School alumni body remains remarkably underserved. The reunions have been a great success, but we have only been able to stage two per year because of limited capacity. With 54 key departments and 64 in total, a rate of two reunions per year means that each department will be able to stage a reunion only once every 30 years!

Our plan by 2012 is to produce five to six reunions (or conference events) each year for the Graduate School, providing a reunion for every department once every 10 years.

In addition, the AYA has sought over the past five years to develop communication pieces (either a newsletter or brief letter from the department chair) for the Graduate School departments. The current budget only allows for one annual newsletter for four departments each year, rotating on a more or less *ad hoc* basis. We would like to introduce annual communications – at a minimum a letter from the chair – for the top 25 departments, and other communications for the remaining departments.

Projects for the next five years

- 3.5.1 As resources permit, consider increasing the Graduate School reunion/conference schedule from two to five per year so that each of the 54 key Faculty of Arts and Sciences departments can stage a reunion conference once every 10 years (currently it is once every 30 years).
- 3.5.2 Support the specific goal of Graduate School Alumni Association board to conduct a multi-disciplinary conference (focusing on cross-departmental subject matter) on occasion.
- 3.5.3 Increase the visibility and networking opportunities for the Dean, who is, of course, the most effective spokesperson for the Graduate School. In recent years, regional Dean's receptions hosted by the AYA have been big draws. We will heighten the Dean's accessibility to alumni by 1) expanding the number of Dean's receptions in first-time cities from one to three per year, 2) expanding the number in repeat major geographic areas with faculty speakers from one to four or five per year, and 3) host one Dean's reception per year or seek out one opportunity per year to highlight the Graduate School (with the Dean present) at a major international alumni event.
- 3.5.4 Take advantage of important Graduate School networking opportunities by increasing Yale's presence at key academic conferences (by hosting alumni receptions).

- 3.5.5 Prepare and produce specific departmental alumni communications from the 25 largest departments every year, and from the remaining departments every two years. Communications would vary in size, format, and amount of content. (See Communications.)

Strategy 3.6

Find greater ways for AYA to link to the on-going alumni activities of Yale’s professional schools. Serve as convener of their alumni staff to leverage on-going efforts.

The alumni activities of Yale’s professional schools range from sophisticated to nascent. The AYA has historically had little connection to the work of the professional schools in forging their connections to those schools’ graduates. We do not suggest that the AYA intrude on the work of the professional schools, but the AYA can play a greater role as a convener of the professional schools’ alumni directors so that “best practices” can be shared and opportunities for collaborations developed. Also, the AYA can play a part in helping the smaller professional schools, especially in the arts, launch initial or more ambitious alumni programs.

Projects for the next five years

- 3.6.1 Regularize the episodic meetings of the professional schools alumni directors with the Executive Director of the AYA.
- 3.6.2 Support the arts schools deans to mount an alumni program.
- 3.6.3 Convene regular meetings of all Professional School Alumni Association staff to foster sharing and communication of best practices, and to coordinate programming.

Strategy 3.7

Increase class participation by increasing quinquennial reunions attendance and by expanding the opportunities for alumni engagement beyond the traditional reunions – encourage Yale class engagement where and when volunteer leaders are prepared to lead them.

In recent years alumni returning to campus have been awed by the revitalization of the campus and the renaissance of New Haven. Getting more graduates back to campus – to our reunions – offers us the best platform to inform them about the University and make them enthusiastic ambassadors. In the last 10 years participation at Yale College reunions has increased more than 30%, from a participation rate of 22% in 1999 to nearly 31% today. But our participation rates have been bettered or equaled by Princeton (43%), Stanford (39%), and Harvard (32%). In particular, Stanford’s growth has been remarkable, from a participation rate of 13% in 1991 to the current 39%.

At the same time, alumni are gathering – with or without our support – in new and different formats, and in locations other than New Haven. While bringing them “home” to New Haven will always be preferred, we can’t ignore the growing demand for so-called “mini-reunions” (off-year multi-day events held in destination cities like Santa Fe, London, or San Francisco), and cluster events (combinations of three or more classes convening around discussion topics or in destination cities).

Princeton’s reunion model is “every class, every year.” While space limitations (housing capacity and dining facilities) on the Yale campus argue against this, we must be adaptive in meeting the expectations of alumni who want to get together more often than every five years. We need to better understand the interests and

needs of young alumni who may be seeking to reconnect in nontraditional ways, for example, coming together in service projects or “mission” driven activities.

Projects for the next five years

- 3.7.1 Explore how we could increase core quinquennial reunion participation from 29% to 40%. We need to assess how campus space constraints might impact that goal and, if necessary, to develop alternatives that mitigate those space pressures.
- 3.7.2 Provide alumni returning for campus reunions a higher level of service than in previous generations. They have higher standards for lodging, dining, transportation, and customer service. Working with our partners in dining and facilities, we must develop new approaches to customer service to inspire alumni to return, and more than that, to want to stay in the dorms! The AYA is currently exploring new models of customer management and service with the Disney Institute.
- 3.7.3 Inspire and motivate class leadership as providing the best leverage to increase attendance. A number of alumni volunteers would welcome and likely benefit from some focused leadership development. We would establish a more thorough training program for class officers with two full training retreats a year, conducted in New Haven and regionally; and place an emphasis on strategic planning among class leaders for the events they plan beyond traditional 5-year reunions.
- 3.7.4 Provide more Yale content (lectures, tours, and demonstrations, et al.) as it has proven to be one of the most effective means of increasing attendance in the past decade. We must work to include such content in at least 50% of our non-reunion class events, whether held in New Haven or regionally, including dinners, lunches, mini-reunions, cluster events, and service projects.
- 3.7.5 Since many alumni would like to reunite with classmates who graduated after or before they did, we should better discern and support multi-class cluster events, both in New Haven and regionally, increasing the number offered from the current 3-5 per year to 10-15. In 2006 the classes of '79, '80, and '81 convened in a combined event in New York focusing on the Yale endowment, with more than 250 in attendance. Recent events have been organized and led by a number of classes themselves, and we need to model this best practice for other classes.

GOAL FOUR

To create the right structures at the AYA and the tools and training for volunteers to achieve the goals of the plan.

A great university trains great leaders. This is one of the measures by which we hold ourselves accountable. An alumni association should foster and inspire leadership qualities, principally in pursuit of University priorities.

But we are not identifying and properly cultivating enough volunteers to lead our classes and Clubs, much less our Shared Interest Groups, most of which are as yet unorganized.

As noted above, we believe a significant number of volunteers would benefit from additional training and greater support. We need to focus on:

1. *Reunion performance* – is their attendance above or below *average* for the last one or two reunions?

2. *Dues contributions* – are they above or below *average* participation rates and contribution amounts for comparable age groups?
3. *Quality of dues communications* – are they timely, and are they personalized or form letters?
4. *Events between 5-year reunions* – how many, and how well are they planned and attended?
5. *Officer engagement* - do they attend the Assembly and training workshops, and help train others?
6. *Officer interaction* – do they communicate well with each other and University staff?
7. *Class governance* – does the class have a class council or other planning group, formal or informal?
8. *Officer recruitment* – are they picking the right people for class councils, delegates, reunion chairs, and secretaries?
9. *Class communications* – does the class effectively utilize newsletters, officer updates, broadcast e-mails, and the Web site? Do they have Class Notes in every, or most, issues of the *Yale Alumni Magazine*?
10. *“Other” activities* – does the class produce a class book, Community Service Fellowship, or other special projects?

Also by consideration of our volunteer leaders and staff, 70% of our Yale Clubs – 125 of 187 – have room for improvement and/or greater support. Among the questions to ask:

1. *Leadership* – is there an organized and self-perpetuating Board that meets on a regular basis? Does the Club have by-laws? Are they registered as a 501(c)3?
2. *Communication* – what is the frequency and quality of communications with their membership? Do they have a Web presence? Do they communicate via e-mail? Do they have an online newsletter?
3. *Activities* - do they have sustained and varied activities? How many events per year? Do they try to engage young alumni, Graduate and Professional School alumni, or other Ivy League alumni?
4. *Speakers* - do they have a faculty speaker from Yale each year? Are they able to find interesting alumni speakers from within their own membership?
5. *Service to Yale* – do they sponsor a Yale Book Award or fellowship program?
6. *Student recruiting* – do they have an active and functioning Alumni Schools Committee? Do they sponsor receptions for current and newly-admitted Yale students?
7. *Officer engagement* - do they attend the Assembly, and help train and share ideas with others?
8. *Officer interaction* – do they communicate well with each other and University staff?

While the AYA has encouraged the formation of shared interest groups, we have but one part-time staff member dedicated to supporting them, and currently have no formal mechanism to recognize or sustain them. Largely on their own, they often take the course of organizing, hiring their own staff, and fundraising on their own behalf. The University has little influence in ensuring that the mission and purposes of these groups are in alignment with Yale’s overall institutional priorities.

We need to be much more engaged in helping to identify, recruit, and support alumni for key roles, and we should not be on the sidelines “hoping” that the right leadership will surface for a given position.

We then have to provide the staffing at the AYA to accomplish the goals we have set, and provide both staff and volunteers with the technological tools that are essential to this work.

Strategy 4.1

Reorganize the AYA staff to improve support of our classes, Clubs, SIGs, and the Graduate School, by creating a focused leadership development team of program officers who are assigned to manage volunteers, not events.

Currently our AYA constituent-based program staff is largely responsible for helping volunteers manage events – reunions, conferences, dinners, faculty speakers, etc. Key to this new plan is the reorganization of

the management team to create *Volunteer Program Officers*. These newly-assigned staff officers (reassignment of current staff or new hires) would focus on the *volunteer*, not the *event*. (The events will be managed by a newly-formed events management team, who will coordinate all events, including assemblies, conferences, and selected Yale Club and Shared Interest Group events). Just as a *Major Gifts Officer* is assigned to cultivate and engage individual donors in the Office of Development, *Volunteer Program Officers* will be assigned to recruit, train, guide, and counsel key volunteer leaders – reunion chairs, class council leaders, Yale Club presidents and board members, Graduate School volunteers, and leaders of our numerous Shared Interest Groups. In helping these volunteers lead their specific organizations, the *Volunteer Program Officers* will counsel and assist them in strategic planning, organizational governance, communications strategies, and setting goals and participation targets.

They will ensure the ongoing vibrancy of these groups by 1) identifying and recruiting new alumni for leadership positions when vacancies arise, 2) matching the right volunteer to the right positions, 3) ensuring that the volunteers remain engaged in productive and fulfilling ways, and 4) integrating them across class, club, Graduate School, and SIG constituencies and facilitating the sharing of ideas. Key will be their work to develop programmatic plans and “deliverables” for the class, club, Graduate School or SIG. The staff would ensure that these volunteers have the necessary administrative and technical tools to support their work. The program officers will promote personal volunteer growth and engagement with the institution. Volunteer recognition which has been a low priority, will be a key goal of the Program Officer.

Projects for the next five years

4.1.1 Reorganize the AYA staff to manage volunteers, not events, moving from our current constituent-based model (staff defined by class, club, travel, Graduate School, or SIG) to a mission- or function-based model (staff defined by leadership, service, and education). Each leadership development team will focus on portfolios of 15 to 20 volunteer organizations.

4.1.2 Establish *Volunteer Program Officer Group*, assign or recruit the following:

Classes: Expand from four officers to five, including:

Case Manager for two Reunion Classes plus, Classes 0-10 (10 key volunteers plus other class officers)

Case Manager for three Reunion Classes plus, Classes 11-25 (15 key volunteers plus other class officers)

Case Manager for three Reunion Classes plus, Classes 26-40 (15 key volunteers plus other class officers)

Case Manager for three Reunion Classes plus, Classes 41-55 (15 key volunteers plus other class officers)

Case Manager for two Reunion Classes plus, Classes 56-65+ (10 key volunteers plus other class officers)

Clubs: Expand from three officers to six, including

Five Case Managers, each assigned three of the largest population Yale Clubs², and 10 mid-population Yale Clubs

One Case Manager for all remaining Clubs

SIGs: Expand from one part-time staff person to two full-time officers, including

Two Case Managers, each assigned two primary SIGs and up to 5 additional (such as career or avocational interest)

² Defined under Goal One, the 180 Yale Clubs would be tiered into three groups – large population clubs with 3,500 or more alumni (6); those with populations of 500-3,500 (54), and those with 500 or fewer (127)

Graduate School: Expand from one program staff person to two, including Two Case Managers, each assigned to three departments per year, arranging reunion conferences)

Young Alumni: None currently, expand to one
One Case Manager assigned to serve and work with current students (alumni of tomorrow) and the youngest alumni on special projects that appeal to them.

Faculty Liaison: None currently, expand to one
One Case Manager assigned to coordinate the engagements of all faculty members (~200) for all constituent groups

Strategy 4.2

Ensure that alumni are effectively motivated, inspired, and equipped to lead, by launching the *AYA Program for Alumni Volunteer Leadership and Innovation*.

The Program would be a series of two-day training sessions for the key volunteers serving in class, club, SIG, and Graduate and Professional School leadership roles. Program training (augmenting the current Assembly training) would take place in workshops for 25-30 participants over 1½ - 2 days, in New Haven or deployed locations. The curriculum would include 1) a review of Yale's overall mission, vision, and priorities; 2) updates on major initiatives and current affairs; 3) *Yale Tomorrow* campaign goals and strategies; 4) endowment, finance, and budget practices and policies; 5) volunteer management skills; 6) best practices from other similar groups or institutions; 7) appropriate governance models (constitution, by-laws, etc.); 8) developing a case for support; 9) event planning; and 10) metrics for success. We can't expect alumni to be effective leaders for Yale if we don't equip them with this kind of training.

Projects for the next five years

- 4.2.1 Develop invitation/participation lists for the first two years of volunteers who will be directly involved with key implementation of this first phase of the strategic plan. We wish to implement two programs per year with 30-40 participants to be trained at each session over time. We would draw from the following groups:
 - a. AYA Board of Governors (26)
 - b. AYA Delegates (~300, overlapping some of the other groups)
 - c. Graduate and Professional School boards and advisory groups (~350)
 - d. Class officers, council members, reunion chairs, mini-reunion organizers (~400)
 - e. Yale Club officers and board members (~1,667)
 - f. Educational Travel volunteers (~75)
 - g. Shared Interest Group boards and advisory councils (~900)
- 4.2.2 Develop curriculum with participation from SOM faculty, development staff, professional school alumni association staff, and other appropriate parties.
- 4.2.3 Produce at minimum two retreats per year.

Strategy 4.3

Develop Web-based tools to enable volunteer leaders and professional staff to create inspiring virtual communities, communicate effectively with their constituents, and manage events.

Yale has simply not kept up with the array of online tools offered by many of our peer institutions. We currently have rudimentary class and club Web sites, the vast majority of which are unused. Many Clubs, classes, and SIGs have cumulatively spent tens of thousands of dollars developing sites with varying degrees of success.

Projects for the next five years

- 4.3.1 Create Web tools to make it easy for alumni groups to develop and maintain basic, static-content Web sites without needing to be/employ Web producers, and additionally, provide a content management system (CMS) to keep content fresh and help alumni groups build community.
- 4.3.2 Provide accurate and timely customer service support for “Chapter Management” tools (including documentation, training, phone/e-mail support).
- 4.3.3 Enable all alumni groups to accept online transactions and process credit cards using a secure Internet merchant account (IMA).
- 4.3.4 Provide improved broadcast e-mail capability and/or support to alumni groups enabling them to communicate with their constituents without providing them the raw contact data (i.e., data pulls from Yale’s alumni records database).
- 4.3.5 Supply membership management tools to alumni (e.g., “real-time” lists of constituents, member profiles, event attendance history, dues history, print-on-demand labels, etc.).
- 4.3.6 Provide alumni volunteers access to non-alumni groups of interest (e.g., widows, students, parents) in the event and membership management and broadcast e-mail initiatives.
- 4.3.7 Provide Web site creation, updates/maintenance, and content generation for strategic classes, Clubs, SIGs, Graduate School departments, and Professional schools.
- 4.3.8 Offer easy-to-use and robust online systems for event registration, financial processing, and reporting.
- 4.3.9 Improve the breadth and end-user experience of the suite of online services offered to alumni.
- 4.3.10 Enable alumni to have greater control in updating the data the university has on record about them; better manage communication preferences; manage online community (OLC) login credentials.
- 4.3.11 Explore and evaluate new online service offerings. For example, broadcast e-mail tool, social networking, full service e-mail accounts.
- 4.3.12 Streamline the online login experience to simplify access to multiple University systems.
- 4.3.13 Expand the reach of online career services. For example, explore resume marketing, enlarge the Yale Career Network, create a job-posting mailing list, host in-person networking sessions, re-evaluate Experience/eProNet.
- 4.3.14 Improve, standardize, and track online services customer service support for individual alumni.
- 4.3.15 Extend online community services to non-alumni groups such as widows/widowers, postdoctoral students, etc.

Strategy 4.4

Create/enhance internal systems to better support AYA program operations.

The organic growth of independent information technology mechanisms over the last ten years has become a model that is not sustainable and will not support the more holistic alumni relations strategy proposed in this plan and the ever-increasing need for robust and integrated systems. The current, distributed data collection and storage model (many clubs/associations and SIG groups maintain their own databases in addition to Yale's alumni records database) makes it difficult, and in some cases impossible, to keep track of alumni who participate in any events (and with what frequency) other than those directly managed by the AYA, or are members of alumni groups beyond Yale College Classes. Just as important, we are unable to acknowledge properly those who attend events, or thank those who are faithful participants/volunteers.

This shortcoming affects our ability to set performance standards and participation targets. We are not easily able to segment our class, club, Graduate School, and SIG markets by those who attend events frequently, those who attend sporadically, and those who never attend – each segment requiring different approaches based on its relative receptivity.

The AYA Web site is the primary source of online information related to AYA news, information, and volunteer opportunities, but it is in need of a strategic reorganization to more effectively engage our alumni at the site, easily directing them to the information they are seeking and providing volunteers with the information they need to manage their constituent groups.

Projects for the next five years

- 4.4.1 Enhance the alumni records and alumni relations database to better quantify alumni, faculty volunteers, and student involvement in and engagement with Yale and the AYA.
- 4.4.2 Increase reporting capabilities associated with AYA program/event Web sites (e.g., more robust Web traffic feedback, and greater detail tracking online registration and financial transactions).
- 4.4.3 Make it easier for visitors to find desired information and make the AYA site more visually appealing.

Strategy 4.5

Create an Event and Business Management Team charged with the planning and implementation of the entire spectrum of class-, Club-, Graduate School-, and SIG-sponsored events, on-campus or off, in order to consolidate, coordinate, and streamline our management services.

Key to this strategic plan is the ability to properly support volunteers with event planners and business managers so that they – the volunteers – are freed to do the work of inspiration and motivation rather than event registration and meal selection.

Underpinning many of the strategic initiatives proposed in this plan is a more robust array of administrative services and operations support. Our current staff manages in silos built around classes, Clubs, Graduate School departments, and SIGs. This often results in the inefficient scheduling and coordination of facilities and University services. There are needlessly repetitive requests for faculty support – multiple uncoordinated requests might be made of a faculty member for reunion weekends, regional Yale Club events, assemblies or conferences, or Yale Educational Travel trips.

For off campus Yale Club events, mini-reunions, and various SIG events, we rely on volunteers to produce and manage the activities. While there are many volunteers who are certainly capable of producing these events, it is not necessarily the best use of their time, nor should we expose them to the pressure of managing events for 200, 300, 400, or more participants. The Yale Alumni Real Estate Association recently attracted 250 participants to an event at the Yale Club, a similar number attended the '79-'80-'81 cluster reunion, and the *Connect with Yale* events are attracting 300 or more. We cannot rely on volunteers for this high pressure, often complicated work.

Brown and Stanford have recently reorganized, creating dedicated event planning staffs; Stanford in particular has seen its participation at regional club events triple. Yale's Development Office offers a model with a small dedicated events squad who support the work of the staff dedicated to prospects.

Projects for the next five years

- 4.5.1 Quantify the scope of the work and demand for events planning and recruit appropriate staff. The team will be a mix of professional planners and customer service support staff.
- 4.5.2 Recruit a Financial Services Manager to manage Club and SIG accounts.
- 4.5.3 Recruit additional administrative support – 2 FTE.

Strategy 4.6

Develop a communications strategy designed to inspire, motivate, and move alumni to the “next” level of engagement and service.

The AYA has not had a communications strategy that has focused on different segments of our alumni population by degrees of engagement with the intent of changing their behavior. To use a class reunion example, we should be able to target 1) alumni who have never attended a class reunion (we cannot do this currently) so that we can invite them with the appropriate incentives to attend; 2) alumni who attended a reunion for the first time so that we can follow-up with appropriate acknowledgements and invitations to return; 3) alumni who attend reunions frequently so that we can thank them and enlist them to engage non-attendees. The same techniques could be employed for the Graduate School, Clubs, and SIGs.

We currently rely on volunteers to produce newsletters for our Yale Clubs and SIGs. Not surprisingly the content and consistency vary widely. Yale Clubs in particular have difficulty in retaining the volunteer support necessary to produce effective communications on a regular basis. We must step in to help.

More basic to our need for a communications strategy is that most alumni do not know who we are or what we do. Many alumni, faculty, and even University administrators still labor under the belief that the mission of the AYA is to ask for money. While delivering a Class Day speech to graduating seniors in 2006, Anderson Cooper quipped, “No matter where you go, no matter what country you live in, they will find you, and they will write you letters and they will squeeze you for every cent you make...If Osama bin Laden was a Yale graduate they would know what cave he was in, exactly. It's true. President Bush should get the Yale Alumni Association on the case.”

We recommend establishing a promotional communications program that will reinforce 1) the interest in attracting more Yale graduates into effective service for Yale and 2) the aspirations of Yale and the AYA to contribute to the graduates' human capital by offering more educational and service programming. That project starts with an inventory of the volunteer needs of the University, and a concerted campaign effort to match those needs with volunteer contributions of time and talent.

Projects for the next five years

- 4.6.1 Hire a Communications Director and Senior Writer to draft/edit the documents outlined below and to develop more compelling communications about alumni activities.
- 4.6.2 Develop appropriate Web and newsletter content for the larger Yale Clubs and SIGs, and travel content for Yale Educational Travel program participants.
- 4.6.3 Create specific Graduate School department communications from the 25 largest, or key departments, *every year*, and from the remaining departments every two years (currently we do four per year).
- 4.6.4 Create an archive of active alumni stories and testimonials to be used in all settings and formats for volunteer inspiration.
- 4.6.5 Develop compelling content for YAM's "News from Alumni House."
- 4.6.6 Renew *Blueprint* or create a similar online organ to act as a source of news to alumni leaders and officers.

Strategy 4.7

Develop marketing strategies designed to compel alumni to engage in existing projects, participate in new ventures, and serve Yale in different capacities. Benchmark new ideas and conduct extensive testing to vet new products and services.

Although most alumni are "loyal," they often have to be convinced to try new products or services, or participate in activities outside of the traditional class reunions and Club events. While Yale has offered a credit card for more than ten years, a lower number of alumni have opted for the card than we would have anticipated or preferred. It is fair to say that we have not been attentive in marketing the card.

But the breadth of new marketing initiatives offered by other universities is remarkable – from discounts at hotels, restaurants, car rental agencies, and clothing stores, to the direct sale of merchandise ranging from wine to regional food stuffs.

But what will be appropriate for Yale? What would our graduates desire that would have the ancillary benefit of additional revenue? And how will this activity affect the reputation of the University – will alumni view these efforts as added personal benefits, leveraging the purchasing power of the University, or as tacky schemes for the University?

Answering such questions requires considered analysis and testing. The AYA even has recent experience at staging a Spring Conference where not enough alumni "signed up" to make it worthwhile. We cannot afford a "build it and they will come" strategy. We need to engage the proper staff and expertise to test, and then build effective marketing strategies to "sell" the product or service. Stanford, Michigan, and Berkeley among others have staffs dedicated to research and new product development.

Projects for the next five years

- 4.7.1 Recruit a Director of Marketing and Research. (Development may wish to share this position.) Recruit a committee of alumni who are experts in marketing to develop a strategic marketing plan with us.
- 4.7.2 Create/implement a “Gap Analysis” survey – a J.D. Power-like annual survey to all alumni leadership measuring their program expectations of the AYA and our ability to deliver effective services.
- 4.7.3 Conduct appropriate surveys to evaluate *all* class, Club, Graduate School, and SIG program events, and to test new services and products.
- 4.7.4 Acquire demographic “life style” information on all alumni to tailor appropriate messages for all constituent groups.
- 4.7.5 Test Club membership mailings in a variety of formats and price points; provide marketing expertise to Clubs.
- 4.7.6 Establish procedures and budgets for ongoing regional focus groups to test new travel ideas, Assembly content, new Club activities, off-year class event strategies, etc.
- 4.7.7 Ensure consistent branding among all class, Club, Graduate School, and SIG publications and communications pieces.

Strategy 4.8

Develop and implement recommended changes in the governance of the AYA.

Although there have been modest adjustments, the basic governance structure of the AYA has not been seriously reviewed in its 35 years. We should use the next five years to determine if we have the best structures in place and whether our processes allow us to tap the right alumni for the right volunteer roles. We need to look at succession planning as well. In doing so, we should review the structure, roles, and responsibilities of the AYA Board of Governors. In recognizing the emergence of our Shared Interest Groups we must determine if they are represented appropriately, as classes and clubs are recognized. We need to consider ways to expand the human capital available to the Board of Governors, including the addition of more *ex officio* positions, the creation of ad hoc groups formed to tackle particular challenges, and the engagement of outside experts.

Projects for the next five years

- 4.8.1 Review the AYA delegate and Board structure to determine whether this representative model continues to serve the alumni community well and determine what changes, if any, might be appropriate and effective (e.g., explicit SIG representation).
- 4.8.2 Review the method of identifying, nominating, and electing Board members and Board officers. Ensure our processes are the best for enlisting the most outstanding leadership for the AYA.
- 4.8.3 Think more strategically about filling delegate slots; expand efforts to involve front-line, active volunteers in the Assembly.
- 4.8.4 Improve the leadership development component of the Assembly.
- 4.8.5 Increase Assembly attendance.

- 4.8.6 Improve the reporting functions of the Assembly with executive summaries, related documents and resources, and delegate reports being made available in a timely manner.

Strategy 4.9

Analyze current “dues” structure for both classes and clubs and recommend changes based on current trends.

Overall dues revenues are declining in both dollars and purchasing power. Further study is needed to determine the long term efficacy of “charging dues” and to explore alternative revenue opportunities.