



ALUMNI AFFAIRS STRATEGIC PLAN

THE AD HOC TASKFORCE TO CREATE AN ALUMNI AFFAIRS STRATEGIC PLAN

Created July 2013

Approved by SUNY New Paltz President Donald P. Christian

OVERVIEW:

During the 185 years that have elapsed since its inception as the New Paltz Academy, the State University of New York at New Paltz, has progressed from an academy, to a normal school, to a teachers college, a liberal arts college, and to a comprehensive university college. During that time it has conferred graduate and undergraduate degrees upon many tens of thousands of students who successfully completed their respective programs of study. Today, the college (hereinafter referred to as New Paltz or the college) has an estimated 60,000 living alumni located across the United States and around the world.

Until the mid-1960's, New Paltz was a small, primarily undergraduate institution, focused on the Liberal Arts and teacher preparation. Beginning in the 60's and progressing to the present day, the college grew substantially in enrollments, numbers of faculty and staff, size and complexity of buildings and grounds, and in breadth and depth of program offerings. Today, the college is pushing the limits of its physical boundaries and programmatically is comprised of six academic units which include the College of Liberal Arts and Sciences, School of Business, School of Education, School of Fine and Performing Arts, School of Science and Engineering, and the Graduate School. New Paltz has also seen a significant increase in stature, visibility, and reputation as a well-regarded public institution of higher education.

Because New Paltz was, for decades, a small and intimate campus community, people entered, studied and socialized together, and graduated in small cohorts of individuals who developed lifelong relationships with virtually everyone in their class. Coupled with the fact that up until the '60's, virtually all students were studying to enter the teaching profession, affinity for one another and the college was a natural byproduct of a small, homogeneous, and tight-knit college community. The great late '60's and early '70's expansion of the nation's colleges and universities, driven by the baby boom generation, fundamentally changed the character of many colleges and universities, and New Paltz was no exception. In the fall of 1960, there were 2,795 students at New Paltz – by the fall of 1975 there were 8,892.

This change had enormous impact on all aspects of college and community life, and especially, for purposes of this document, the college's relationship with its graduates. The great expansion had eliminated many of the traditions in place at New Paltz, particularly those associated with fraternity and sorority life – a central part of the social fabric of New Paltz until the mid to late '60's. As the college changed in multiple ways, there was little resemblance between the pre and post-expansion college, which created a significant disconnect between the pre-70's alumni and the campus that all but replaced their alma mater, socially and physically.

As the much larger and complex "university college" emerged, it struggled to grow into its new identity and keeping track of graduates and developing positive relationships with alumni was not an institutional priority – or even much of a second thought for that matter. The lack of attention to such details was further exacerbated by the institutional fight for survival that occurred as a result of the severe budget cuts and enrollment declines of the mid-'70's. In the following decades, New Paltz's priorities were associated with rebuilding and expanding programs, improving the physical campus, hiring large numbers of new faculty, increasing the academic profile of students, increasing student success rates, and strengthening the residential character of the New Paltz student experience. The college has met and in many cases exceeded its objectives in these areas, but is only now involved in serious discussions about how to strategically develop meaningful relationships with its alumni – across the state, the nation, and the globe.

The purpose of this document is to focus specifically on a discussion of the college's alumni relations; where we are, where we wish to go, and what we need to do to get there.

ALUMNI RELATIONS AS AN INSTITUTIONAL PRIORITY:

At this juncture in the college's history, it is necessary for New Paltz to aggressively embrace the challenge of reengaging alumni in the life of the college. It is widely regarded as one of the objectives that are central to making a great college even better. As we began to take a serious look at what others are doing and looked with a critical eye at our own activities in alumni relations, it became clear that this is not at all about fundraising. Rather, it is about relationship building and having alumni continue to be active members of the college community after graduation. Success will be measured in terms of involvement and

interaction, not in dollars given. It is with this principle in mind that “Alumni” became a central element in the New Paltz strategic plan.

As part of its campus-wide strategic planning efforts, SUNY New Paltz’s essential initiatives include “**Engaging alumni in the life of the College**” (<http://strategicplanning.newpaltz.edu/>).

The final campus strategic plan states:

Alumni are among the most important assets of any college or university. They are the living embodiment of the values within the institution’s DNA – values that can inform decisions and directions well into the future. Their own stories about their successes and challenges they have faced in their lives and careers since graduation provide important assessment information to inform curricular and program revision. Alumni can be key ambassadors, for example by supporting recruitment goals by connecting prospective students and their parents with their alma mater; speaking on behalf of an institution’s financial or other needs with state legislative or executive leaders; or introducing potential major donors to the development office. Alumni may mentor students, and serve as inspiring and informative speakers. Working alumni are often key to identifying internship, research, or cooperative educational opportunities that are critical in the learning and career preparation of current students. Certainly alumni are often the primary philanthropic supporters of their alma mater.

In January 2013 SUNY New Paltz announced the appointment of a new Director of Alumni Relations, a position previously vacant for several years. Shortly afterward SUNY New Paltz President Donald Christian announced the formation of an ad hoc task force charged with creating a draft mission statement and draft strategic plan for alumni engagement, to be completed by June 30, 2013, for review by the President’s Cabinet. The task force began meeting in March 2013. This document outlines the charge to the task force, its membership, and the task force’s findings and recommendations.

The Charge

The full text of President Christian’s charge to the task force (January 23, 2013):

The State University of New York at New Paltz boasts more than 60,000 alumni residing in many countries around the world. We are proud of their talents and accomplishments, and we value their affection for, and support of, their alma mater. They are among our greatest resources. We have an opportunity right now to do a vastly better job than we have done in building a worldwide community of SUNY New Paltz alumni. Strengthening our ties with our graduates is not only the right thing to do but it is something we must do if the College is to thrive and continue to educate new generations of students.

The recent appointment of Ms. Brenda Dow as director of alumni relations brings an experienced and enthusiastic professional to the task of building an outstanding alumni office and program. It is appropriate at the start of her tenure that we engage in a thoughtful discussion of the mission of the office of alumni relations and the development of a strategic plan that creates a blueprint for the steps needed to bring that mission to life.

With this in mind, I have asked L. David Eaton, vice president of enrollment management, to convene and chair an advisory ad hoc task force to create a draft mission statement and a draft strategic plan for the office of alumni relations. Brenda Dow will serve as vice chair. The draft documents will be reviewed and acted upon by me and my Cabinet. Mr. Eaton and Ms. Dow will select task force members. In addition, I will ask the chair of the Foundation Board to nominate a member, and I will ask the president of the SUNY New Paltz Alumni Association to serve.

My charge to the task force is this:

- *Create a draft mission statement for review and approval by my Cabinet and me that can guide our engagement of alumni around the world in support of the College.*
- *Develop a draft strategic plan for the office of alumni relations that will coordinate alumni outreach across the campus and bring the mission statement to life.*
- *Ensure that the strategic plan is in compliance with SUNY System guidelines and regulations concerning alumni activity in support of the College.*

Donald P. Christian
President

Task Force Members

- L. David Eaton, Vice President for Enrollment Management (Chair)
- Brenda Dow, Director of Alumni Relations (Vice Chair)
- Brian Williams, Associate Director of Athletics, Wellness and Recreation
- Shana Circe '02 '08g, Director of On-Campus Recruitment, Undergraduate Admissions
- Juliet Bryan-Coxum '92 '12 CAS, President, Alumni Association (an independent association)
- Alan Dunefsky '69 '92g, Special Assistant for Projects, Development Office
- Robin Cohen-La Valle '77 '82g, Associate Dean of Students, Student Development
- Suzanne Grady, Director, Office of Communication and Marketing
- Ted Clark, Lecturer, School of Business

METHODOLOGY:

The task force met nearly weekly from March through early June 2013. Each member, having been selected because of their particular vantage points, brought diverse, broad, and unique perspectives to the table relative to the task at hand. Task force activities were organized as follows:

Information Gathering:

- Each member independently researched best practices among college and university alumni relations operations around the nation. The group looked at services, events, communications, and mission statements from numerous institutions that had successful, well-established programs.
- The task force conducted a review of a comprehensive research survey of New Paltz alumni conducted in 2006 by Carnegie Communications.
- The task force reviewed the depth and characteristics of institutional data pertaining to New Paltz alumni.
- Focus group exercises were conducted with 1) current alumni from a wide range of cohort years and 2) with current upper-division students representing a wide array of social and academic interests.
- A task force delegation visited SUNY Oneonta, which is a campus widely regarded as having an exceptional alumni engagement program.
- Task force members conducted a series of listening sessions with alumni-employees from the faculty, administrative staff, and support staff.

Structured Brainstorming:

Using the information gathered and experiential perspectives of members, the task force spent a series of meetings generating ideas for the development of a strategic plan for the college's alumni relations initiatives. These sessions were organized in the following categories, spending one or more meetings on each one:

- What should be included in the mission statement for the alumni relations office at New Paltz?
- What services should the college provide to our alumni to meet their needs and expectations?
- In what activities could alumni become involved that would be of mutual benefit to them and the college?
- What initiatives would best reconnect the many unconnected alumni with the life of the college?
- What communication mechanisms should/could be used to promote alumni engagement?
- What would bring large numbers of alumni back to the campus? – Both those in the region and those who are not.

From these activities, including robust discussion and debate, the task force developed an assessment of the current state of alumni relations at New Paltz, a description of what the ideal state of the college's alumni relations should be, a list of obstacles to achieving the desired position, and a set of strategic activities that will move us from our current position to our desired position.

PRESENT POSITION:

The task force findings regarding the present position of alumni relations as an institutional activity are summarized in the following statements:

- Given the longstanding absence of institutional emphasis on alumni relations as an organizational priority, what has and is being done is fragmented, uncoordinated, and lacks even a modicum of programmatic coherence. A small number of departments utilize either in-house or campus alumni database information for periodic communications to alumni from specific majors or program groups, but without any centralized gatekeeping or overarching strategy.
- Alumni database information is incomplete and many times inaccurate. The good news is that New Paltz has an enormous number of alumni – it just needs to do a better job of finding and communicating with them. Individual and separate databases are maintained by some programs and academic departments, but territorial imperatives make it difficult to collect and consolidate such records.
- No institutional strategy or program exists to transition undergraduate students from students to engaged alumni, including imbuing graduates with the expectation that they remain engaged in the life of the college after commencement.
- Although alumni have powerful and lifelong affinity for clubs, organizations, academic departments, an overall lack of institution-wide school spirit, institutional traditions, and shared common experiences serve as a significant barrier to the cultivation of alumni affinity for the college itself.
- No organized alumni advisory group exists to act as a liaison between the college and its worldwide community of graduates. Although an independent alumni association has existed for decades, its scope has been very narrowly developed to serve its members in the immediate area and meaningful interaction with the college has been minimal.
- The college communicates to alumni principally through fundraising and the New Paltz magazine, an email newsletter, which reaches all those for whom the institutional records are accurate and up-to-date.
- Alumni express a consistent sentiment that they are irritated by the fact that the only communications they feel they receive from the college are solicitations for financial support. This includes “asks” made by schools, departments, affinity groups, and the independent alumni association. The solicitations are not centrally coordinated and members of the staff of the Development Office, who are responsible for institutional fundraising, are often unaware before the fact of how many “asks” are being made or by whom.
- Annual alumni reunion activities have been planned and facilitated by the college for many years and, in relative terms, have been successful. The problem with these events is that they are not well attended. New Paltz generally attracts approximately 200 of the tens of thousands who potentially could participate, which makes it financially challenging and an inefficient use of institutional resources from a return-on-investment prospective. It is also symptomatic of an unfortunate lack of engagement with the college’s alumni.
- New Paltz has no organized alumni networking services designed to assist alumni and current students to do such things as produce internship opportunities for current students, or promote employment opportunities for students and alumni through alumni businesses, organizations, or professional contacts. These are among the most frequently cited best practices for successful alumni programs at other colleges and universities.
- The college offers no notable opportunities for alumni to engage in the campus community through such means as being a guest speaker or lecturer, participating in personal and professional development programs designed to specifically serve the needs of alumni, or being part of the institution’s recruiting efforts. Again, these examples are frequently cited as best practices at other, well-developed alumni programs.
- The college’s alumni communication efforts have no social media elements. A Facebook page for alumni was created and functions independently and has no institutional information or presence. The alumni page on LinkedIn hasn’t been managed since its inception approximately five years ago.
- New Paltz has no reliable data on the location and employment of the vast number of international students who have and continue to graduate from the college. This constitutes a missed opportunity of enormous proportion, considering the potential such alumni have for furthering recruiting, training, and employment opportunities for prospective and current students.

DESIRED POSITION:

Given the underdeveloped state of Alumni Relations at New Paltz, the college's desired position is essentially the antithesis of its present position. The initiatives associated with achieving the desired position are driven by the following statement of mission, which was created and adopted by the task force.

The Mission of the State University of New York at New Paltz Office of Alumni Relations is:

*To foster enduring relationships with and among our alumni,
To cultivate and support a culture rich with the spirit of New Paltz, and
To engage and serve our alumni in meaningful and valuable ways.
Forever Orange and Blue. Forever New Paltz.*

The task force proposes that the college's desired position for alumni affairs be realized by achieving the following:

- Alumni relations and connections are a high profile institutional objective and all members of the college community are actively involved and aware of the individual role they play in promoting lifelong engagement of New Paltz graduates in the life of the college.
- All alumni are apprised of the college's renewed determination to embrace its graduates in meaningful ways and that the institution has elevated the importance of engagement with alumni as among the highest priorities.
- A sense of school pride and lifelong engagement is effectively fostered among students throughout their educational careers, which successfully transition them from active and engaged students to loyal and involved alumni when they pass the line of demarcation at commencement. This affinity for the college is grounded in powerful common experiences and traditions shared by faculty, staff, and students as community of the whole.
- The college promotes communication between the college and alumni and within and amongst alumni through appropriate and effective social media services, electronic and written correspondence, the magazine, e-newsletter, and attendance at alumni events on and off campus.
- The college offers on-going career services and professional development experiences specifically targeted to meeting the needs of New Paltz alumni.
- Active alumni networks exist to promote employment opportunities for recent and long-term graduates and to foster internship opportunities through alumni connections for current New Paltz students.
- Large numbers of New Paltz alumni serve the college through such activities as guest lecturers in and outside of the classroom, volunteer admission recruiters, participating as advisory board members for schools, departments, programs, and as organizers and conveners for alumni events around the world.
- Alumni reunions are well-attended and popular – this is achieved by strategically offering events that are designed to be attractive to alumni across the generations, thus bridging the intergenerational gap by capitalizing on a strong shared affiliation as New Paltz alumni.
- The Office of Alumni Relations enjoys the advice, support, and participation of the Alumni Advisory Board, comprised of a broadly representative group of alumni who are individually committed to promoting the continued success of the college by harnessing the collective power of New Paltz's global network of loyal alumni.

OBSTACLES TO ACHIEVING THE DESIRED POSITION:

The following statements describe the principal obstacles that are to be addressed as the college moves forward to achieve its desired position for the alumni relations program:

- Perceptions among alumni, faculty and staff, and students regarding the role and institutional importance of alumni must be fundamentally altered in order for the breadth and depth of changes discussed here to achieve fruition.
- Incremental investments of institutional resources for staff, supplies, travel, and communication dedicated to alumni relations will be necessary to achieve the college's desired position.

- Finding lost alumni and updating contact information for all New Paltz alumni will be of paramount importance to emerging institutional efforts to engage all living alumni in the life of the college.
- Because New Paltz alumni are spread out over multiple generations, segmented outreach messaging, services, and events must be developed that address the generational differences in preference, need, and affinity relationships of disparate groups who attended fundamentally different colleges - joined by some common threads of experience.....beginning with place, name, and history.
- New Paltz alumni are spread out across the nation and the globe. Therefore, it is necessary that the college develop a functional organizational structure to facilitate alumni interaction within defined geographic regions, where such groups represent the building blocks of the global alumni network.

ACTION PLAN:

Given the desired position is, in essence, the antithesis of the present position and significant obstacles exist to achieving the desired position, a fundamental cultural change will need to occur within the campus and among the alumni body. Therefore, “to cultivate and support a culture rich with the spirit of New Paltz,” an action plan designed to achieve such a change takes a multi-year approach and incorporates metrics to guide its rollout, providing feedback on alignment with mission and strategic objectives.

“To foster enduring relationships with ... alumni,” an effective alumni-engagement action plan must elicit the support and buy-in of faculty and staff across all units of the campus, leveraging the natural and primary affinities alumni have to their academic and professional faculty and to their academic, extracurricular or co-curricular programs. For longer-term alumni, those relationships are often with faculty, staff, and programs no longer active on campus, necessitating an action plan that includes cultivation of faculty as alumni-engagement partners even after their New Paltz retirement.

To foster relationships among alumni and “engage and serve our alumni in meaningful and valuable ways” requires an action plan that applies best practices while testing its receptiveness among the unique populations within New Paltz’s alumni body. Thus it’s essential to monitor return on investment broadly as well as among segments of alumni to plan how best to serve the diversity of needs with current staffing and financial resources, while keeping an eye toward priorities for future growth. The task force methodology of information gathering and structured brainstorming has provided a foundation on which the action plan builds, including areas for further exploration to provide additional details and create business intelligence processes to inform future tactics to achieve objectives.

The Action Plan, attached to this document as Appendix A, describes specific tasks and activities that are to be initiated during the next five academic years to fundamentally change the way New Paltz interacts with its graduates and, subsequently, to engage alumni worldwide in the life of the college in important and dynamic ways. The Action Plan contains a timeline for implementation and reference to the specific characteristics of the Desired Position to be addressed by each action.

This action plan is a living document that will serve as a strategic framework for planning and implementing these initiatives and their relative effectiveness will be continually measured through proper assessment and the resulting feedback will inform strategic adjustments as the plan evolves