

STRATEGIC PLAN 2012 - 2017



A 5-YEAR STRATEGIC PLAN

In 2011-2012, the WKU Alumni Association undertook a journey of self-discovery. The organization looked at its history, its constituents, its purpose, its infrastructure, and its possibilities for the future. An extensive survey was conducted and alumni feedback was analyzed. The end result is a comprehensive strategic plan that was driven by a dedicated group of volunteers. As we move into our next century, we believe it is more important than ever to embrace the traditions that make WKU what it is today and to also look forward with a clear vision of what the Association and University can become in the future.

The strategic plan for the Western Kentucky University Alumni Association articulates the priorities and outlines specific indicators to be achieved by the year 2017. The following statements of vision, mission, purpose, and key values serve to undergird the plan and guide the organization in its work.

VISION

For each member of the WKU Family to embrace the Spirit and develop an unwavering, lifelong relationship with WKU.

MISSION

To cultivate the WKU Spirit by engaging all members of the WKU Family in the life of the institution.

STATEMENT OF PURPOSE

The purpose of the Western Kentucky University Alumni Association is to preserve and build upon the Spirit that makes this institution special by developing relationships with all members of the WKU Family, training an active core of volunteers for the University, assisting with career networking for current students and alumni, empowering alumni to aid in student recruitment, providing a strong continuing education program to engage alumni in lifelong learning, conducting social and informational events which keep alumni involved in University life, and securing the necessary financial support to advance the institution. Our commitment to service is unwavering as the Association capitalizes on the unique WKU Spirit while enhancing the Alumni Association as well as the entire University.

Key Values

The key values guiding the work of the Association naturally revolve around the **SPIRIT** associated with the institution. These values are fundamental to our success and drive the behavior of those involved with the Association.

- S** *Serve* all members of the WKU Family and the institution with passion and enthusiasm
- P** *Perpetuate* the WKU Spirit through developing unique programs, services, and traditions
- I** *Insist* that integrity, ethical behavior, trustworthiness, and professionalism are inherent characteristics
- R** *Respect* volunteers, alumni, colleagues, staff, faculty, students, parents, and other partners equally
- I** *Involve* all the diverse members of WKU Family in the life of the institution
- T** *Think* strategically, proactively, and creatively to enhance the Association

Major Underlying Principles and Assumptions

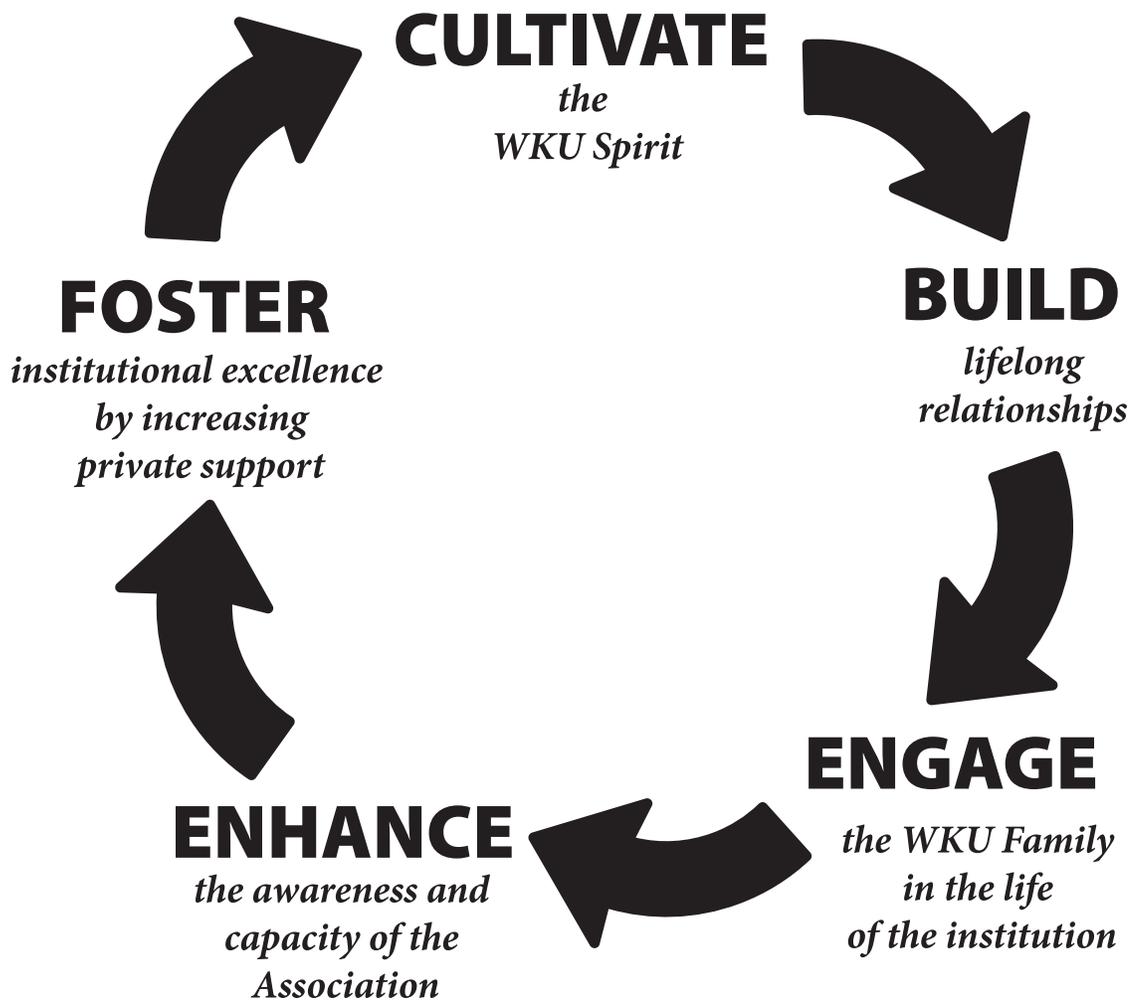
The strategic plan for the WKU Alumni Association rests on several key principles and expectations:

- The focus of the plan is centered around the five primary goals and their associated objectives and strategies;
- Priorities must be established and guided by the concepts of what can we be the best in the world at doing, what drives our economic engine, and what are we deeply passionate about offering;
- Plan initiatives will be built wherever possible on current programs and services, and growth will be by substitution unless capable of generating new net revenue or additional staff resources;
- This strategic plan emphasizes vision and ideas over the means for implementing them;
- Annual operating plans, tied to specific strategies and annual operating budgets, will be created to enable and guide the implementation of the goals set forth in this plan;
- Staff and empowered volunteers will be organized to support the plan;
- Performance against plan goals will be measured regularly and adjusted accordingly;
- A balance will be maintained between fiscal responsibility and the maximization of programs and services to the members;
- The plan assumes a 5-year horizon for complete implementation;
- Given the changing nature of our constituents, the plan will always be a work in progress in order for it to remain dynamic and responsive to an evolving constituency base.



OVERARCHING GOALS

Alumni Association



GOAL:
Cultivate the WKU Spirit

**KEY
RESULT
AREA**

1

TARGETS

- Communicate with all 100,000 alumni across the globe through various mediums on a consistent basis
- Revitalize the Student Alumni Association and involve 20% of student body in SAA activities
- Recruit 1,500 members for the Legacy Program

**STRATEGIC
PLAN**

OBJECTIVES

- 1.1 Nurture the loyalty, pride, and traditions of the institution
- 1.2 Create memories and generate stories that bring the WKU Spirit to life
- 1.3 Develop timely and relevant publications and communication strategies that strengthen the WKU Spirit
- 1.4 Create a positive image and awareness of a dynamic and diverse University community
- 1.5 Provide members of the WKU Family the tools they need to make WKU more visible in their personal and professional lives
- 1.6 Implement programs and services that serve the WKU Family

SAMPLE STRATEGIES

- Impact multiple facets of the institution because the overall WKU Experience shapes future behavior
- Produce a high quality *WKU Spirit* magazine four times per year
- Ensure the *News from the Hill* electronic newsletter is sent monthly filled with captivating content
- Expand merchandising opportunities for alumni and other constituents to showcase their WKU pride
- Distribute Big Red Books to all incoming freshmen describing traditions
- Showcase WKU traditions through freshmen experience and senior capstone classes in the Augenstein Alumni Center
- Develop a comprehensive marketing plan for current student initiatives to cultivate the Spirit while students are still on the Hill
- Host events that bring more legacy kids to the campus at early ages
- Have a greater presence at professional conferences which have high concentrations of alumni
- Host signature events that cultivate large groups of alumni in exciting environment

NOTES

GOAL:

Build lifelong relationships

**KEY
RESULT
AREA**

2

TARGETS

- Attract 100,000 visitors and guests through the Augenstein Alumni Center on an annual basis
- Achieve an equivalent attendance of 2/3 of our alumni base through programming
- Achieve Chapter of Distinction levels in 10 geographic areas

**STRATEGIC
PLAN**

OBJECTIVES

- 2.1 Enhance outreach efforts through an active network of geographic alumni chapters
- 2.2 Expand programming efforts to include social, cultural, service, and recruitment efforts to improve the quality of life of our alumni and the communities we serve
- 2.3 Become a more customer-service focused organization
- 2.4 Develop metrics and systems to track every interaction with every alumnus
- 2.5 Create opportunities for greater interaction to connect all members of the WKU Family with the University and with each other
- 2.6 Develop powerful personal, professional, special interest, and career networks to facilitate Hilltopper connections

SAMPLE STRATEGIES

- Use surveys and analytics to develop an understanding of alumni expectations from WKU and WKUAA
- Develop strategies for targeted marketing and messaging based on age, involvement, and life-stage
- Create concept that provides opportunities throughout the entire spectrum of the whole life of the family member-- "from cradle to grave."
- Utilize student volunteers to conduct Thank-A-Thon calling to donors
- Develop educational opportunities for continued engagement in select chapter areas
- Incorporate a WKU Welcome Wagon concept into geographic areas to aid in transition of alumni
- Collaborate with Career Services to expand on career networking and recruitment opportunities
- Expand the Alumni Travel program to provide unique experiences for alumni, students, and faculty
- Create events that utilize the Augenstein Alumni Center and build relationships for the future

NOTES

GOAL:
Engage the WKU Family in the life of the institution

**KEY
RESULT
AREA** **3**

TARGETS

- Recruit and involve 2500 volunteers in the institution to expand outreach and service
- Conduct 182 cultural, social, service, and/or educational events annually that engage members of the WKU Family

**STRATEGIC
PLAN**

OBJECTIVES

- 3.1 Become an organization that meets constituents “where they are” and involve them in meaningful experiences
- 3.2 Create opportunities for alumni and volunteers to serve WKU and the Association
- 3.3 Expand alumni affinity groups and constituency groups linked to institutional engagement priorities
- 3.4 Utilize alumni marketing materials to emphasize institutional priorities and create a more informed and engaged alumni base
- 3.5 Build greater campus collaboration by creating university wide definitions and understanding of alumni engagement and methodology

SAMPLE STRATEGIES

- Encourage chapters to be actively involved in civic and community engagement in their respective locations
- Create ambassadors engaged in recruitment, retention, outreach, and civic engagement
- Use demographic information and measure trends to better communicate and engage alumni
- Enhance a mature and thriving volunteer program to identify, train, encourage, and recognize good leaders
- Develop a Hilltopper Community Service Day to be celebrated around the globe
- Enlist more volunteers to aid with reunion programming for constituency groups
- Implement a comprehensive mentoring program to utilize alumni in improving student retention and placement
- Expand the legislative advocacy network to provide assistance with higher education issues

NOTES

Blank area for notes.

GOAL:

Enhance the awareness and capacity of the Association

KEY
RESULT
AREA

4

TARGETS

- Strengthen sustaining membership to 15% of alumni base
- Expand lifetime membership endowment to reach \$1.5 million
- Raise \$5 million in support of the Augenstein Alumni Center

STRATEGIC
PLAN

OBJECTIVES

- 4.1 Become a more market-oriented organization by expanding market research initiatives and segment base with defining characteristics
- 4.2 Expand the visibility and awareness of the Association
- 4.3 Utilize the expertise and experience of alumni, faculty, staff and external organizations to provide greater opportunities for collaboration and strategic partnerships
- 4.4 Develop a staffing plan and structure to meet the changing demands placed upon the Association
- 4.5 Strengthen membership and involvement to provide the financial capacity to support the initiatives of the Association
- 4.6 Diversify revenue streams to ensure the financial stability of the Association
- 4.7 Ensure the Augenstein Alumni Center showcases the pride of the institution and provides a welcoming and inviting environment to engage all members of the WKU Family

SAMPLE STRATEGIES

- Create a consistent image for the organization
- Transition all admissions tours to the AAC
- Establish new affinity programs that generate revenue for the Association and provide benefits for WKU alumni
- Add additional staff and operating resources to be more comparable with benchmarks
- Create revenue through expanded merchandising opportunities
- Implement a 2,013 new members in 2013 marketing campaign
- Define greater alumni metrics to promote accountability and effectiveness
- Utilize academic departments and campus resources more in a spirit of collaboration
- Create a lifetime member walk to expand the endowment

NOTES

GOAL:

Foster institutional excellence by increasing private support

KEY
RESULT
AREA

5

TARGETS:

- Achieve the status of having the best alumni participation rate in the country for public comprehensive universities by reaching 25%
- Increase the combined endowment for the University to \$150 million
- Generate \$20 million annually in private support for WKU
- Enhance the deferred gift inventory to \$100 million for individuals leaving WKU in their estate plans

STRATEGIC
PLAN

OBJECTIVES

- 5.1 Educate all members of the WKU Family on the importance of private support to the health and vitality of the institution
- 5.2 Facilitate a user-friendly and consistent giving process
- 5.3 Steward gifts appropriately to ensure donor expectations are met
- 5.4 Build a predictable pipeline of donors to ensure sustainable support for the future

SAMPLE STRATEGIES

- Implement a year round calling program to reach more alumni and friends
- Incorporate thank you note cards from deans and department heads indicating to donors precisely how gifts are being used
- Initiate a first-time donor retention plan to prevent the attrition from Year 1 to Year 2
- Host receptions in select companies who provide matching gift programs
- Create more stewardship events for select departments to encourage relationships at various levels throughout the organization

NOTES