MUAA National Board
Strategic Planning Workshop
January 23, 2015
Agenda

- Approach and Progress to Date (*Dillow*)
- Review proposed objectives & tactics (*Teams*)
  - Increase depth and breadth of alumni engagement
  - Utilize the alumni network to enhance Marquette’s reputation
  - Broaden alumni donor base and grow giving at all levels
- Group report-outs and discussion (*Teams*)
- Next steps (*Dillow*)
# Roadmap & Scheduling

<table>
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<tr>
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<th>11/18 Call</th>
<th>12/16 Call</th>
<th>1/20 Call</th>
<th>2/17 Call</th>
<th>3/17 Call</th>
<th>4/21 Call</th>
<th>4/25 Board Meeting</th>
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<tbody>
<tr>
<td>Brainstorm Engagement Objectives</td>
<td>Brainstorm Engagement Objectives</td>
<td>Finalize Engagement Objectives</td>
<td>Finalize Donor Objectives</td>
<td>Prepare for 1/24 Board Planning Session</td>
<td>Planning Workshop with Full Board</td>
<td>Review Full Board Feedback</td>
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<td>Brainstorm Donor Objectives</td>
<td>Brainstorm Reputaion Objectives</td>
<td>Finalize Reputation Objectives</td>
<td>Finalize Strategic Drivers</td>
<td>Plan Approval</td>
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<td>Finalize Strategic Drivers</td>
<td>Prepare for 4/25 Board Approval</td>
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<td>Plan Approval</td>
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Board Purpose Statement

Goal: Reinforce Board role and our value to Marquette

The MUAA National Board of Directors assembles to offer counsel and support to Marquette University through University Advancement, the division of the university responsible for alumni engagement. Our diverse National Board members are unified in a passion for Marquette and serve to continually enhance the relationship between Marquette and its alumni.
Strategic Drivers

Current Plan

• Diversity & Inclusion
• Communication
• Innovation

Previous Plan

• Diversity & Inclusion
• Redefining Excellence
• Technology
Initiative: Increase depth and breadth of alumni engagement

• Alumni Programming:
  – Focus on young alumni/reunion classes
    • Ensure active promotion and exposure of MUAA to student body, providing leadership on the issue of transition from “students” to “young alumni”
    • Look at dynamic communication options
  – Provide direction on continued and ongoing efforts to connect Dr. Lovell with the alumni community
  – Make it easier for solo alumni to host events
    • Continue to update and enhance “Event in a Box” website with ideas, as was begun after April, 2014 National Board meeting
Initiative: Increase depth and breadth of alumni engagement

• Communication and Sharing:
  – Help design easy-to-navigate website (with focus on young alumni, reunions, and volunteer opportunities)
  – Review and provide feedback on expanded spiritual offerings through the enhanced website
  – Share alumni and student stories beyond Class Notes to create excitement
    • Use video to feature famous alumni and favorite faculty
    • International alumni: Recognize more ex-pat alumni and activities
Initiative: Increase depth and breadth of alumni engagement

• Volunteer Empowerment:
  – Generate ideas on volunteer opportunities and recruitment
    • Share insight and feedback on peer-to-peer fundraising for volunteers (starting tactic: pilot with reunion classes and ultimately use for campaigns, etc.)
  – Provide direction on strategic alignment of alumni boards and committees (by-laws, templates, goals, etc.)
  – Devise opportunities to collect more alumni data, especially regionally, in support of the Alumni Engagement Scoring model
    • Design competition element (chapter vs. chapter)
Initiative: Increase depth and breadth of alumni engagement

• Volunteer Empowerment (cont’d):
  – Provide direction and feedback on alumni programming around Athletics, including empowering volunteer leaders to organize gatherings around lacrosse, soccer, crew, etc.
Initiative: Broaden alumni donor base and grow giving at all levels

- Investigate using peers to enhance alumni donor participation, including referrals for the qualification process
- Increase the number of non-season ticket holder alumni donors to Marquette Athletics
  - Share current status of Athletics fundraising
- Better communicate the need
- Increase planned gifts secured through enhanced marketing
  - Share and critique current efforts
Initiative: Broaden alumni donor base and grow giving at all levels

• Look at planned giving propensity
• Focus on communication issues (messaging):
  – Demonstrate how gifts truly help
• Show the impact of a gifts
• Show gifts at work (i.e. Charity Navigator)
• Discuss and evaluate dynamic communication options, with focus on two-way (multi-way?) communication
Initiative: Utilize the alumni network to enhance Marquette’s reputation of excellence

• Feedback and direction on alumni mentor and career services programming; enhance college relationships around this platform; create regional networks for students and young alumni when possible

• Idea generation on opportunities to cultivate and capitalize on relationships with Marquette business owners and community partners

• Review and feedback on diversity engagement efforts
Initiative: Utilize the alumni network to enhance Marquette’s reputation of excellence

• Feedback on online communication and how to best capture pride points and newsworthy information (internal and external) across the colleges
• Direction on sponsorship opportunities and in particular, how to increase value for CIRCLES host committees and sponsorships
• Assess roles for Alumni Association social media ambassadors – determine responsibilities, structure, and best platforms
• Direction on opportunities to engage faculty (e-communication, programming, etc.)
Initiative Discussion and Analysis

- Is there enough stretch (while still being pragmatic)?
- Is there anything that should be eliminated because it isn’t relevant enough?
- How do/would the drivers present themselves in these objectives/tactics
- Prioritize the objectives
- How could we make these measurable?

- **Discuss and document in your groups**
- **Present results to the Board**
Next Steps

• Strategic Planning Committee will review the results of our discussion at our February 19 call
• Committee will continue to refine and finalize the plan
• Present plan for final approval of the full Board in April