### Unit/Office 2013-14 Assessment Plan

#### 2013-2014 Plan

#### 2013-2014 Closing the Loop Summary

#### 2014-2015 Plan

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**Unit: Advancement**

**Office: Alumni Relations and Development**

**Person Responsible: Roxanne Johnston**

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**Directions:** For each office, the office will provide an assessment plan, giving information on the linkage to the Strategic Plan Construct, and the assessment goal(s) and strategies that will be employed. Enter this information in the table below.

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**Overarching Strategic Goal:** To be a nationally recognized comprehensive master’s institution focused on student success as evidenced by significant gains in select benchmarks.

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**2013-14 Assessment Plan:** This section summarizes the departmental/office plans for progress toward strategic goals.

<table>
<thead>
<tr>
<th>Strategic Construct</th>
<th>Divisional Priority/Objective(s)</th>
<th>Assessment Objective (KPI)</th>
<th>Assessment Measures</th>
<th>Resources Needed</th>
<th>Timeline</th>
<th>Person Responsible</th>
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| (1) Culture of Philanthropy and Connectedness (CP&C) | Investment by stakeholders in the institution as a quality of place. | Reach and exceed Campaign Goal of $25 million by increasing the size and number of gifts, pledges, and planned gifts by 2016. | • Achievement of the following goal by 6/30/14: $18.75 million  
• Establish stronger metrics and accountability for giving officers related to visits, proposals and dollar goals  
• Implement the donor module of the Academic Works software  
• Establish Task Force to | Staff time  
Campaign budget | June 2014 | VP/Staff |
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| (2) Culture of Philanthropy and Connectedness (CP&C) | Graduates remain engaged in the life of the campus. | Increase outreach to alumni locally and across the country through a variety of activities. | • Plan a full slate of programs to engage a variety of alumni groups (age, affinity, interest).  
• Manage split of Homecoming and Reunion weekends for May and September 2014.  
• Collaborate with enrollment management to involve alumni in recruitment of prospective students and retention of current students. | Staff time  
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|                     |                                  | • Build chapters with first tier and second tier levels with regard to staff and resource allocation  
|                     |                                  | • Develop and enhance programming by partnering with career services for networking, mentoring, and career connections between alumni and students.  
|                     |                                  | • Collaborate with advancement and marketing to do a comprehensive survey of alumni base  
|                     |                                  | • Finish implementation of iModules  
|                     |                                  | • Develop a yearly calendar planning process for both internal and external planning and events |
2013-2014 Closing the Loop Summary Report: This section reports the results of the year’s efforts in meeting the stated objectives.

<table>
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<tr>
<th>Assessment Objective/KPI</th>
<th>Assessment Measures</th>
<th>Data/Results</th>
<th>Outcomes</th>
<th>Recommendations</th>
<th>Proposed Action Items</th>
<th>Person Responsible</th>
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| Reach and exceed Campaign Goal of $25 million by increasing the size and number of gifts, pledges, and planned gifts by 2016. | • Achievement of the following goal by 6/30/14: $18.75 million  
• Establish stronger metrics and accountability for giving officers related to visits, proposals and dollar goals  
• Implement the donor module of the Academic Works software  
• Establish Task Force to research partnership opportunities for scholarships  
• Host a minimum of three donor stewardship events  
• More fully utilize financial edge reporting to provide more timely reports for auditors, donors and development officers.  
• Increase by 25 percent the number of alumni and donor communications  
• Establish a pilot program for soliciting unrestricted gifts by giving officers |             |          |                 |                      |                    |
| Increase outreach to alumni locally and across the country through a variety of activities. | • Plan a full slate of programs to engage a variety of alumni groups (age, affinity, interest).  
• Manage split of Homecoming and Reunion weekends for May and September 2014.  
• Collaborate with enrollment management to involve alumni in recruitment of prospective students and retention of current students.  
• Build chapters with first tier and second tier levels with regard to staff and resource allocation  
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• Collaborate with advancement and marketing to do a comprehensive survey of alumni base  
• Finish implementation of iModules  
• Develop a yearly calendar planning process for both internal and external planning and events |
Additional Explanation (as needed – especially if objectives not met):

Description of the IMPACT --- how have these efforts mattered/made a difference – assessment should result in knowledge/change that matters, that contributes to institutional renewal and supports the Mission:

### 2014-2015 Assessment Plan: Alumni Relations and Development

This section summarizes the departmental/office plans for progress toward strategic goals.

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NOTE: Cut and paste this into the next year’s fully developed assessment plan.