Unit/Office 2011-2012 Goals & Assessment Plan

Unit: Alumni Relations
Director: Kerry Gotham
Staff Liaison: Kerry Gotham, Betsy Standish, Bill Sachman

NOTE: Brad Schreiber supervised this unit for the majority of 2011-12

Directions: For each unit, 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.

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

2011-2012 Assessment Plan: This section summarizes the Divisional plans for progress toward strategic goals.

<table>
<thead>
<tr>
<th>Strategic Construct</th>
<th>Divisional Priority/Objective(s)</th>
<th>Strategic Goal</th>
<th>Assessment Objective</th>
<th>Assessment Measures</th>
<th>Resources Used</th>
<th>Timeline</th>
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<tbody>
<tr>
<td>(2) Culture of Philanthropy and Connectedness (CP&amp;C)</td>
<td>Graduates remain engaged in the life of the campus.</td>
<td>Continue to build the Alumni Relations program.</td>
<td>Increase outreach to alumni locally and across the country through a variety of activities</td>
<td>• Hire new Director of Alumni Relations • Establish operational plan for alumni area. • Expand membership of the</td>
<td>Funding for position Staff time</td>
<td>June 2012</td>
<td>VP Staff</td>
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</table>
Brockport Alumni Association Board of Directors to include national members and regional reps.

- Increase regional and national alumni events.

Creating a Culture of Evidence & Continuous Improvement

The College at Brockport’s Division of Advancement is committed to building a culture of philanthropy and alumni connectedness.

<table>
<thead>
<tr>
<th>Assessment Objective</th>
<th>KPIs/Benchmark</th>
<th>Outcome/Results</th>
<th>Analysis</th>
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<tbody>
<tr>
<td>Hire new Director of Alumni Relations.</td>
<td>All SUNY college and universities, along with sister-schools outside SUNY, have full-time alumni relations directors.</td>
<td>Brockport had gone more than a decade without a 100% alumni relations focused director until the hiring of Kerry Gotham in May 2012.</td>
<td>The hiring of a new director will put a stronger and strategic emphasis on alumni planning and outreach to our more than 80,000 living alumni. This will come in several forms, notably events, social media and data analysis.</td>
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<td>Establish operational plan for alumni area.</td>
<td>Alumni Relations and Development partner on several projects, but Alumni Relations needs its own operational plan.</td>
<td>A fully-functioning staff and plan have been put in place for 2012-13, strategically looking at our alumni data and how best to engage them both on- and off-campus.</td>
<td>Focus in 2011-12 was on student (FAN Club) and young (GOLD) alumni, as well as a variety of events around NYS and the country. While many had good attendance, a more systematic approach with consistent follow-up plans needs to be established.</td>
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<td>• Expand membership of the Brockport Alumni Association Board of Directors to include national members and regional reps.</td>
<td>Traditionally, Brockport’s Alumni Board has been focused on WNY representation. We would like to change the focus to a more national board.</td>
<td>Dennis Thompson (San Diego), Roshelle Pavlin (Washington state), Nick Catanzaro (Washington, DC) were added to the board.</td>
<td>We will continue to look at the value of this plan, especially with an emphasis on regional chapters coming down the road. Dennis is a natural for the alumni group in San Diego, and Nick can assist with programming in the DC area. Roselle is a great advocate, but not near a large alumni population in the Northwest.</td>
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<td>Increase regional and national alumni events.</td>
<td>Outreach across the country is a critical piece of the alumni program.</td>
<td>Held monthly young alumni events from November to April in Rochester and Buffalo. Did regional events in NYC/LI; Washington, DC; Saratoga Springs; Buffalo.</td>
<td>The volume of activity on the road needs to increase substantially. A regional chapter plan will be put in place in the near future to formally address this issue.</td>
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2011-2012 Closing the Loop Summary Report

The following report outlines the assessment tools used and data compiled in regard to **no more than three** departmental/office goals from 2011-2012. It will also highlight the proposed action items and recommendations for the next year, 2012-2013.

**2011-2012 Goal:** Hire a Director of Alumni Relations

**Assessment Tool and Data:** Find best candidate through the College search process (search committee, HR, etc.)

**Tool Used:** Search process; advertising and websites to attract applicants; phone calls

**Data/Results:** Brought in several strong candidates, but found best fit in Kerry Gotham, who had been Director of Alumni Relations at nearby Nazareth College

**Summary/Conclusions:** In first month on the job (June 2012), made great first impressions with Boards, staff, campus community, and initiated a stronger planning process than had been in place previously. Brought wealth of knowledge and connections in field to campus, along with an understanding of greater Rochester market (having worked at Nazareth) and connections to the Brockport community (wife from Brockport and in-laws still live in town).

**Recommendations:** Support his plans and operations to the highest extent possible!

**Proposed Action Items for the next year:**

- Continue to execute entry plan (had been here just one month when calendar turned)
- Put a stronger on-line and social media plan in place (interested in bringing iModules to campus)
- Utilize staff appropriately (play to its strengths)

**2011-2012 Goal:** Build our Future Alumni Network (FAN) Club
Assessment Tool and Data: Work with the student-side of Banner and the team in Campus Life to determine the breakdown of undergraduate students by class

Tool Used: Banner

Data/Results: Programmed a variety of activities and events to engage and educate current students about what it means to be an alumnus and how valuable the alumni networking experience can be. Established the “Bucket List” (a senior-year “scavenger hunt” and “to-do list” to teach them about the history of Brockport and give them memories of their time on campus), hosted four general networking events between alumni and students and two specific to academic programs (History and Communication) and assisted the Arts for Children club to hold an art-inspired family fun day. Also did several “Senior Week” activities, including a senior toast.

Summary/Conclusions: The current students are having an exceptional experience at Brockport. Formalizing a “FAN Club” was a natural next step and one that has been universally received as invaluable to meeting our alumni connectedness goals.

Recommendations: Continue to grow this program, incorporating even more of an emphasis on what it means to “give back” as alumni.

Proposed Action Items for the next year:

• Grow the senior class gift program, including another attempt at a “card-swipe” by BASC.
• Modify the “Bucket List” program (simplify)
• Continue to partner with Student Affairs and Campus Life on programming

2011-2012 Goal: Involve Brockport Alumni Who Are Faculty and Staff (BAWAFAS) in more activities

Assessment Tool and Data: More than 300 alumni work on campus, in a variety of positions. As ambassadors for Brockport, it is critically important to keep them engaged and informed.

Tool Used: HR data and Banner.

Data/Results: BAWAFAS helped greet parents and students during Welcome Weekend and presented gifts for “Legacy” families. Also, there was at least one reception and one First Friday with a BAWAFAS emphasis.

Summary/Conclusions: Several in this group are engaged with the campus (assisting with programming, giving to the Faculty/Staff Campaign), but more needs to be done to use them as true ambassadors.

Recommendations: Discuss with those already engaged what it would take to get more involvement from others.

Proposed Action Items for the next year:
• Continue to keep involved in the Welcome Weekend “legacy” program
• Hold receptions during Homecoming and/or Family Weekend to spread the good news about Brockport

2012-2013 Assessment Plan

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

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

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<td>(2) Culture of Philanthropy and Connectedness (CP&amp;C)</td>
<td>Graduates remain engaged in the life of the campus.</td>
<td>Continue to build the Alumni Relations program.</td>
<td>Increase outreach to alumni locally and across the country through a variety of activities.</td>
<td>• Plan a full slate of programs to engage a variety of alumni groups (age, affinity, interest). • Increase use of social media and introduce iModules and regional chapters to alumni population. • Establish plan for regional alumni chapters.</td>
<td>Staff and volunteer time</td>
<td>June 2013</td>
<td>VP/Staff</td>
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2011-2012 Briefing Book

The Briefing Book is separate from your Annual Report in that it is somewhat of “brag book” that will highlight goals and accomplishments for each department. The Briefing Book entry is a consolidated version of your annual report highlights. Please indicate below which information you would like included. Please keep in mind that there is room in the Briefing Book for each department to have about two pages; therefore, the information provided on your Annual Report should be consolidated significantly to just include the most significant highlights.

Points of Pride

Academic Quality & Engagement
• Provided a location on campus (Alumni House) for departments and offices to hold both formal and informal functions (staff retreats, holiday celebrations, etc.)

Co-curricular Programming & Support Services

• Hosted student and alumni networking events in conjunction with Student Affairs, Campus Life, and others.
• Collaborated with the Arts for Children club on a family-fun project.
• Co-led the Student Leadership Conference, which brought 15 alumni back to campus to talk about their careers and what it takes to be a leader in today’s society.

Learning Environment & Quality of Place

• Provided a location on campus (Alumni House) for departments and offices to hold both formal and informal functions (staff retreats, holiday celebrations, etc.)
• Worked with the BAWAFAS to welcome new students and their parents, who are alumni, to Brockport.

A Culture of Philanthropy & Alumni Connectedness

• Developed the Future Alumni Network (FAN) Club to inspire current students to be engaged alumni when they graduate. This program included the Brockport Bucket List for seniors.
• Hosted Homecoming Weekend and other successful reunion programs, including the Campus School Reunion and the Brockport Singers Reunion.

Please list no more than seven accomplishments that your department achieved in 2011-2012.

These will be submitted for inclusion in the College Accomplishments publication.

<table>
<thead>
<tr>
<th>2011-2012 Accomplishment</th>
<th>Description</th>
<th>Data/Results</th>
<th>Summary/Conclusion</th>
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<td>Hired Kerry Gotham as Director of Alumni Relations</td>
<td>Critical hire. Had not had a fully-dedicated Alumni Director in more than a decade.</td>
<td>Added a full-time “line” to the Alumni Relations operation.</td>
<td>Position was filled in the last month of the 2011-12, so too hard to see a major impact. But, all indications were that the addition of this position would significantly enhance the</td>
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<tr>
<td>Item</td>
<td>Description</td>
<td>Notes</td>
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<td>Built FAN Club</td>
<td>Needed to have a formal platform for working with current students who will eventually be alumni of the College.</td>
<td>Programmed four general networking events and two department-specific programs, as well as a “fun-day” with the Arts for Children program. Should create a different culture and connectedness for students as they transition from Brockport.</td>
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<td>Started to formalize a young alumni/GOLD (Graduates Of the Last Decade) program</td>
<td>Understanding the value of young alumni (nearly one-third of our alumni data base) to our long-term fund raising program, we need to do more to engage this group.</td>
<td>Held four events in WNY during the year, as well as many other functions that targeted their interests (sports, professional networking, etc.). Many of our young alumni have begun to make substantial gifts to The Fund for Brockport. Moving into 2012-13, we need to formally recognize the GOLD group and engage them in a strategic fund raising program.</td>
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<td>Held several successful on- and off-campus reunions</td>
<td>In addition to the Homecoming program, we held a special weekend for the Brockport Singers (1970s group), and an enormous reunion for graduates, faculty and friends of the Campus School (which shut down in the early 1980s).</td>
<td>The Homecoming and Brockport Singers events were well attended, and the Campus School event more than met expectations, with a crowd of more than 400 attending the luncheon and other activities around it. We need to continually look to affinity groups for reunion possibilities, as well as discuss a next option for the Campus School group. Another idea been analyzed is whether to bring the summer reunion back into existence.</td>
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