### Unit/Office 2012-2013 Goals & Assessment Plan

#### 2012-2013 Closing the Loop Summary

#### 2013-2014 Goals & Assessment Plan

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

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.

### 2012-2013 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 (add goal # where applicable)</th>
<th>Assessment Objective</th>
<th>Assessment Measures</th>
<th>Resources Used</th>
<th>Timeline</th>
<th>Person Responsible</th>
</tr>
</thead>
</table>
| (2) Culture of Philanthropy and Connectedness (CP&C) | Graduates remain engaged in the life of the campus. | Continue to build the Alumni Relations program. | 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).  
• Increase use of social media and introduce iModules and regional | Staff and volunteer time | June 2013 | VP/Staff |
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>
</tr>
</thead>
<tbody>
<tr>
<td>Plan a full slate of programs to engage a variety of alumni groups (age, affinity, interest).</td>
<td>We had 50 events over the past year.</td>
<td>Maintain events deemed to be successful (total attendees and good donor prospects) and phase out ones that do not fit with strategic plan.</td>
<td>Our main focus will be in the greater Rochester area as we have 30,000 alumni living there. We also will target regional areas in a two-tier approach. Tier 1 regional areas will receive more attention and resources as the critical mass is higher in those areas with regard to general population and prospects. The Tier 2 areas will involve self-selected volunteers and good prospects for engagement opportunities.</td>
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<tr>
<td>Increase use of social media and introduce iModules and regional chapters to alumni population.</td>
<td>We had an increase of 1,500 users with Facebook, LinkedIn, and Twitter. Began process to implement iModules content management system.</td>
<td>Continue to utilize social media to promote events and targeted messaging. Intentionally recruit alumni to join groups/pages or follow specific applications. Once iModules is up and running it will allow the web to better integrate with social media outlets, as well as provide a data collection tool, e-blast tool, and secure site for class notes, info updates, and directory searches.</td>
<td>With budget constraints affecting our postal mailing opportunities, it will be critical that we utilize our web and social media outlets to push important messaging from the event, volunteer, and philanthropic standpoints. This must include an intentional effort to collect and maintain clean data, especially email from alumni.</td>
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<td>Establish plan for regional alumni chapters.</td>
<td>We hosted (in conjunction with entire Division of Advancement) 21 regional events.</td>
<td>Expanded our regional effort and provided a Brockport presence to many new alumni eager to connect.</td>
<td>Attendance at regional events was sporadic, so continue to build volunteer base in areas to utilize them in event and programs decisions. Focus more staff efforts on larger Tier 1 areas (Rochester, Syracuse, Buffalo, NYC, Albany, Boston and DC). Develop process and procedures for volunteer management in smaller Tier 2 areas, but important areas to maintain a presence (Atlanta, Charlotte, Florida areas, California, etc.).</td>
</tr>
</tbody>
</table>
2012-2013 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 2012-2013. It will also highlight the proposed action items and recommendations for the next year, 2013-2014.

2012-2013 Goal: Develop an alumni GOLD group for programming, communication, and philanthropy

Assessment Tool and Data: Created a GOLD (Graduates Of Last Decade) committee and recruited 20 members, hosted GOLD launch events in six cities and had more than 100 alumni in attendance. Created a specific Facebook group with almost 500 users, and laid out the GOLD Challenge with a goal to raise $25,000 from the GOLD alumni base, which was reached by the end of 2012-2013 fiscal year and matched by the GOLD leadership donors.

Tool Used: Social media, event management data, and gift reports.

Data/Results: The GOLD group was officially launched in December 2012 and in just eight months raised $50,000 for the Brockport Foundation, captured 10 Leadership level donors and 243 total donors, built a committee of 20 volunteers and hosted nine events.

Summary/Conclusions: The first year in developing and branding the group was a success. We will continue to cultivate and program specifically to this group throughout the coming year providing social, networking, and service opportunities, while also focusing on retaining and stewarding the donors and acquiring new ones. We will work to transition the 2013 class into the ranks of the GOLD and move the Class of 2004 into their 10-year Reunion.

Recommendations: This group accounts for nearly 30% of the total alumni base and warrants a great deal of attention.

Proposed Action Items for the next year:

- Continue to build brand identity with GOLD alumni and increase volunteer numbers for events and activities, as well as the GOLD committee.
- Develop strategic and targeted messaging in programming and solicitations.
2012-2013 Goal: Implement a content management system for Division of Advancement

**Assessment Tool and Data:** Project to transition advancement web pages to a robust content management system. Existing site was clunky, not well organized, and lacked tools specific to Advancement. It did not have a user friendly content management system for timely edits, our targeted e-blast tool had limitations, we did not have a robust event registration tool.

**Tool Used:** iModules software product

**Data/Results:** Tool allows us to better collect data, provide targeted e-blasts, more options with online giving, secure directory search, a complete event reservation tool and a link between Banner and iModules data collection.

**Summary/Conclusions:** The process of bringing this project together has been a collaborative effort with alumni, development, advancement services, marketing, and IT. There is potential for the product to be used to help other departments on campus, but we must get it up and running and tested prior to that. The data issue continues to be a road-block to going live, but is critical to not rush this as to ensure that the communication between the two databases is seamless.

**Recommendations:** Continue to build out site and work together with iModules and IT to clean up data issues.

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

- Launch site to general alumni base and start using tools to communicate and market Division of Advancement events, messages, and activities.

2012-2013 Goal: Increase alumni and student engagement

**Assessment Tool and Data:** Planned and implemented a variety of programs and communications to connect alumni and students.

**Tool Used:** Collaborated with Student Union and Activities, IEL, Res Life LLCs, admissions, career services, Deans and departments to connect students with alumni for networking, mentoring, and engagement.

**Data/Results:** Hosted a variety of events and programs including: Senior Forum, 5 LLC events, IEL event on Scholars Day, admission accepted student receptions, LinkedIn education program, School of Business network event, TAHSS network event, Orientation programs, Open House programs, etc.

**Summary/Conclusions:** Connecting students to alumni provides a value-added proposition for both groups. Students get a leg up in pursuing their career or passion and alumni feel like they are truly making a difference in helping a student to achieve success. This also grows the culture of alumni connectedness by showing the next generation of alumni how to steward and stay connected to their alma mater.

**Recommendations:** Continue to provide opportunities for students (current and prospective) to connect and engage with alumni.

**Proposed Action Items for the next year:**
• Work with campus partners to provide opportunities for alumni to engage with students.

2013-2014 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.

<table>
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<tr>
<th>Strategic Construct</th>
<th>Divisional Priority/Objective(s)</th>
<th>Strategic Goal</th>
<th>Assessment Objective</th>
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<th>Resources Needed</th>
<th>Timeline</th>
<th>Person Responsible</th>
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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).</td>
<td>Staff time</td>
<td>June 2014</td>
<td>VP/Staff</td>
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2012-2013 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

- Hosted events in conjunction with Residential Life Living and Learning Communities to highlight alumni speakers in specific professional programs and connect them to students on those floors.
- Collaborated with School of Business to host end of year recognition event for faculty, students, and alumni.
• Collaborated with the School of the Arts, Humanities, and Social Sciences for a school-wide alumni, faculty, and student event.

Co-curricular Programming & Support Services

• Collaborated with athletics to provide opportunities for athletics alumni gatherings and games for nine teams.
• Partnered with Admissions, IT, Graduate Studies, Marketing, and outside vendor to develop a virtual tour of Brockport campus.
• Collaborated with Institute for Engaged Learning to provide alumni and student networking event on Scholars Day.

A Culture of Philanthropy & Alumni Connectedness

• Developed a GOLD program for recent alumni for programming and fundraising purposes and had a successful $50,000 GOLD Challenge.
• Hosted hundreds of alumni and friends at Campaign Launch and Regional Launch events – in person and on-line.
• Launched a new advancement web site and content management tool, iModules.

Learning Environment & Quality of Place

• Worked hand-in-hand with numerous campus offices and departments to put on a grand opening weekend for SERC and Homecoming and presented at a CASE conference.
• Provided a location on campus (Alumni House) for departments and offices to hold both formal and informal functions (staff retreats, holiday celebrations, etc.)

Please list no more than seven accomplishments that your department achieved in 2012-2013.
These will be submitted for inclusion in the College Accomplishments publication.

<table>
<thead>
<tr>
<th>2012-2013 Accomplishment</th>
<th>Description</th>
<th>Data/Results (where possible)</th>
<th>Summary/Conclusion</th>
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<td>Developed recent alumni GOLD (Graduates Of Last Decade) program</td>
<td>A focused effort to target recent alumni in programming events, communication, and philanthropy.</td>
<td>The GOLD group was officially launched in December 2012 and in just eight months raised $50,000 for the Brockport Foundation, recruited 10 Leadership level donors and 244</td>
<td>The first year in developing and branding the group was a success. We will continue to cultivate and program specifically to this group throughout the coming year providing social, networking, and service opportunities, while also focusing on retaining and stewarding</td>
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<td>Total Donors</td>
<td>Built a Committee of 20 Volunteers and Hosted Nine Events</td>
<td>the Donors and Acquiring New Ones. We Will Work to Transition the 2013 Class into the Ranks of the GOLD and Move the Class of 2004 into Their 10-Year Reunion.</td>
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<td><strong>Instituted iModules Software</strong></td>
<td>Project to Transition Advancement Web Pages to a Robust Content Management System. Tool Will Allow Us to Better Collect Data, Provide Targeted E-Blasts, More Options with Online Giving, Secure Directory Search, a Complete Event Reservation Tool and a Link Between Banner and iModules Data Collection.</td>
<td>The Planning, Design, Training, and Implementation Process Has Gone Very Well. However, There Are Some Issues With the Data Exchange Mechanisms Between Banner and the Product.</td>
<td></td>
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<td><strong>Increase Alumni and Student Engagement</strong></td>
<td>Planned and Implemented a Variety of Programs and Communications to Connect Alumni and Students.</td>
<td>Collaborated with Student Union and Activities, IEL, Res Life LLCs, Admissions, Career Services, Deans and Departments to Connect Students with Alumni for Networking, Mentoring and Engagement. Connecting Students to Alumni Provides a Value-Added Proposition for Both Groups. Students Get a Leg Up in Pursuing Their Career or Passion and Alumni Feel Like They Are Truly Making a Difference in Helping a Student to Achieve Success. This Also Grows the Culture of Alumni Connectedness by Showing the Next Generation of Alumni How to Steward and Stay Connected to Their Alma Mater.</td>
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