



**Trinity University National Alumni Board
Long Range Planning Committee
Report to TU NAB**

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**Dave Mansen
Dave Schlosser
Kim Pettit
Celeste Diaz-Ferraro
Mary Kay Cooper**

The Mission of Trinity University

Trinity University is an independent co-educational university whose mission is excellence in the interrelated areas of teaching, research, and service. Trinity seeks to provide broad and intensive educational opportunities primarily to undergraduates in liberal arts and sciences, and in selected professional and pre-professional fields. It also offers a small number of selected high quality graduate programs.

Trinity University is dedicated to creating a superior intellectual environment by: recruiting, developing and retaining outstanding faculty members dedicated to teaching, to scholarship and creative endeavor, and to service to the University and its community; identifying, and attracting talented and highly motivated students to its predominantly full-time, residential student body; and providing a supportive and challenging experience wherein students, faculty, and staff can realize the potential of their abilities and engage their responsibilities to others. Trinity respects its historic ties to the Presbyterian Church, with which it continues to have a covenant relationship.

The Mission of the Trinity University National Alumni Board

As the Trinity University Alumni Association's governing body, the National Alumni Board seeks to increase alumni interaction and support to strengthen the relevance and voice of Trinity's alumni as a primary constituency in the University Community.

The Report of the TU NAB Long Range Planning Committee

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Introduction

The Trinity University National Alumni Board (NAB) appointed a long-range planning committee (LRPC) to assess the state of Trinity's alumni programs relative to national best practices and peer institutions, and make recommendations for development of top-tier alumni programs.

After extensive research and discussion during the past eighteen months, this report consolidates the long-range planning committee's findings. The committee's analysis led to this goal for the Trinity University Alumni Association:

Through service and value to our alumni, become a leading alumni association among our peer institutions and rival the national exemplars of alumni participation.

Achieving this ambitious goal will require the Alumni Association to achieve several objectives:

- Planting the seed of alumni engagement early in students' lives, beginning with prospective students who see that the university has high expectations for its alumni.
- Creating a personal and technological infrastructure that allows alumni to engage in a two-way, reciprocal relationship with the institution on their own terms and in ways that add value for them.
- Increasing alumni satisfaction and active support of the university over time.
- Dedicating sufficient resources to support these objectives by the Trinity University Alumni Association and National Alumni Board, administrators and staff, and the Trinity University Board of Trustees.

The balance of this report details the long-range planning committee's information and analysis that support this goal.

To Become a Leading Alumni Association

Definition

Different universities define the success of their alumni institutions in different ways. The LRPC undertook research on a variety of institutions, including Trinity's peers, schools in the region, and schools with which the LRPC members had personal experience. Despite the diversity of sizes, shapes, and organizations among those institutions, several common themes emerged among their measures of success:

- Alumni and their alma mater share a reciprocal belief that both benefit from alumni association with the institutions. The value of this benefit may or may not be monetary.
- Alumni believe that they are significant stakeholders in their alma mater and matter to its future, and the institutions demonstrate the same belief in words and action.
- Alumni and their alma mater share high expectations of each other.
- Alumni choose to participate from a variety of university-offered programs that engage and excite them at a measurable and sustainable high level.
- Alumni take pride in their affiliation with the institution, and their school celebrates the success of its alumni.
- Their alma mater is a tangible presence in alumni's lives.

The LRPC took particular note of the reciprocity inherent in the themes that emerged from leading alumni organizations: the relationship between alumni and their alma maters generates value for both.

Application to Trinity University

Although the LRPC identified several common themes, Trinity University is unique. The LRPC interpreted those common themes from the perspective of what the Trinity University Alumni Association could become:

- The Trinity University Alumni Association (TUAA) and National Alumni Board must work in all capacities to eliminate the stereotype that alumni only hear from the university when it is seeking donations.
- TUAA and NAB activities and communications must continue extending the university's branding through message integration.
- NAB and TUAA leadership must dedicate the vast majority of their efforts to creating reciprocal value in the relationship between alumni and the university. Opportunities for on-line and in-person professional and social networking demonstrate this dedication; on-line tools may allow alumni to do a lot of the work themselves. As another example, Trinity's commitment to a liberal arts education demonstrates that the university and its graduates share an interest in lifelong learning. Trinity should be

- an integral and indispensable part of that process by offering alumni a variety of opportunities to learn and experience new things. Group travel, exclusive on-line access to university lectures and cultural events, and the “Scholars on the Road” program are examples of the TUAA’s dedication to generating reciprocal value.
- The university and its alumni can cooperate to increase valuable, reciprocal engagement with each other. For example, faculty and staff can invite alumni to speak with students about careers or opportunities for public service (one model is the Department of Economics’ annual *tamalada* during Alumni Weekend, though other opportunities exist), and alumni can invite students to participate in community activities or internships. Importantly, as the geographic reach of Trinity extends farther from San Antonio; such engagement does not need to occur exclusively in San Antonio. Technologies such as Web conferencing offer opportunities to connect members of the Trinity community regardless of their physical locations.
 - Trinity students celebrate a diversity of interests that expands and evolves through their time at the university and after they graduate. The TUAA must respond to this natural lifecycle by accommodating individuals’ desires to choose the most interesting and relevant opportunities their relationship to Trinity offers them. Some alumni will find the greatest relevance in their major department or a particular faculty member; others will find their association with an activity, a club, or a team more compelling. Most will find that their interests change as they advance in their careers and mature in their lives.

The goal and result of becoming a leading alumni organization is the development of recipient-relevant connectivity that accommodates diverse locations, diverse interests, diverse needs, and diverse points of entry into the university. This also acknowledges that an individual alumnus’ location, interests, needs, desires and ability to access the university will change continually during his or her life-long connection to Trinity.

Challenges

The LRPC’s analysis of these issues also included potential barriers to achieving the goal of becoming a leading alumni organization. Without dwelling on such challenges, the LRPC members acknowledge that the TUAA and NAB cannot achieve their ambitious goals without explicitly identifying the issues that are most likely to arise:

- Trinity has been multiple institutions during its life:
 - A university that was almost entirely dedicated to serving students in its geographic region now serves students from many countries all over the world and sends many of its students to other parts of the world for part of their undergraduate educations.
 - A university that was once considered a “country club” transitioned to one of the most respected and academically rigorous institutions of higher education in the country.
 - A university that emerged from a religious denomination now maintains only loose ties to that community of faith.

- Three universities merged and moved through multiple locations, adopting alumni from multiple institutions along the way, before settling relatively recently in San Antonio, creating many potential divergences of interest among alumni.
- Trinity's alumni are increasingly diverse geographically and ethnically, and many now live in cities, states, or countries where there are too few alumni to support a local chapter.
- Most of Trinity's cherished alumni institutions remain based on the idea that most alumni remain in or near San Antonio. For example, invitations to such important on-campus events as Christmas Vespers and the Distinguished Lecture Series are increasingly irrelevant to recent graduates who no longer live in San Antonio.
- Trinity has significantly fewer alumni relations and development staff members, with less experience, relative to its peer institutions that have more extensive and diverse forms of alumni engagement.
- Many of the faculty and staff most associated with Trinity, and particularly with its transition to its current academic status, have retired or will soon do so.
- Institutions such as fraternities or sororities and athletics on which other universities rely to engage their alumni are comparatively weak at Trinity, or have only recently emerged as a source of strong association to the university, such as the football team's "Mississippi Miracle" play that won the \$100,000.00 Pontiac Game Changing Play of the Year award. Additionally, many – if not most or all – of their alumni activities are independent of the Office of Alumni Relations and, therefore, invisible to the Alumni Association.
 - Considering the goal of recipient-relevant and reciprocal connections (allowing alumni to engage with the institution on their own terms and in ways that add value for them) there are too many existing and potential touch points for the university to control them all. Unfortunately, TUAA needs to capture the most relevant information from all those interactions to maintain current information about where to find its members and what interests and opportunities they find most compelling.
- Within the foreseeable future, Trinity may choose to move out of *US News and World Report's* regional rankings and fall from its traditional #1 ranking in the region to a top-fifty ranking among national institutions.

Benefits of Emerging as a Top-tier Alumni Association

Many leading alumni associations generate benefits for current students and the institution itself. The LRPC began its analysis of benefits in becoming a top-tier alumni association by considering the impact on alumni. The LRPC recommends the National Alumni Board undertake the steps necessary to become a leading alumni organization.

Impact on alumni

Alumni derive tangible and intangible benefits from membership in a leading alumni organization. Among the most important tangible benefits the LRPC discovered in its research of other institutions and among Trinity alumni are:

- Library access, including on-line access to research databases and journals;
- Affinity cards that allow members to receive discounts or earn rewards for doing business with restaurants, shops, athletic teams, or cultural institutions local to the university (for example, Cappy's, the San Antonio Missions, and McNay Art Museum), or with national and international companies (for example, Amazon.com or Barnes and Noble, Cabela's or Bass Pro Shops, and Chili's or Applebee's);
- Discounts for university events, clothing, books, or gifts;
- Group-based access to services such as travel, insurance, and financial research or trading, or membership in such organizations as frequent-traveler programs, warehouse shopping, and cultural institutions; and,
- Exclusive access to on-line content generated through the university, such as guest lectures, musical and dramatic performances, student productions, or popular events (for example, Dr. Grissom's alumni weekend lectures).

The development of an extensive set of tangible benefits justifies annual or lifetime dues at some alumni organizations; however, the LRPC does not recommend charging dues for membership in the TUAA. Overall, we have high expectations for our alumni and every graduate is a valued alumnus, not just those that pay dues. Intangible benefits may be even more important to alumni in terms of maintaining their engagement with Trinity. These benefits include:

- Access to personal and virtual connectivity for purposes of social and professional networking;
- Personal and virtual connectivity among alumni in settings conducive to life-long learning such as group travel and faculty or guest lectures;
- A sense of connection to the institution and other alumni through participation in and support of student and alumni activities, such as advising clubs and mentoring students or recent alumni;
- Opportunities to influence the placement or support of legacy and heritage students; and,

- Community involvement in public services such as Habitat for Humanity or local food banks, regardless of where the alumni's communities happen to be.

Several of these examples of tangible and intangible benefits include a significant component of alumni interaction with current students, who also derive benefits from a leading alumni organization.

Impact on students

Engaged alumni contribute to the mission of Trinity University to provide broad and intensive educational opportunities by recruiting top students and faculty into a supportive and challenging environment.

- Participation in educational, cultural, and developmental opportunities on the campus encourages real-world application of learning to society, work, and life.
- Recruitment and retention of top students extends Trinity's reputation as a highly selective institution.
- Financial contributions support the university's financial health and ability to respond to changing economic and competitive conditions, the university's endowment, and financial aid to students.

Students who have the opportunity to access a network of enthusiastic alumni may better prepare themselves for current and future opportunities through various strategies of engagement, including:

- Identification of internship and employment opportunities;
- Development of formal and informal mentors based on shared personal or professional interests;
- Seeking personal or virtual tutoring in academic, occupational, or service challenges;
- Learning about real-world application of students' academic and personal lessons; and,
- Participation in service and community projects such as Elf Louise's local efforts to aid families during the holidays, United Way's national effort to enroll individuals and families in the Earned Income Tax Credit program, or Rotary's international efforts to eradicate polio.

Importantly, the LRPC also identified the opportunity for alumni engagement with current students to model the expectations that Trinity has of its alumni and lay the foundation for future involvement in participation and giving.

Alumni who are active in the lives of current students show them what positive alumni engagement looks like and demonstrate the benefits of that engagement in such tangible ways as mentoring, life-long learning, networking, support of the financial aid that enables many students to attend Trinity, alumni enjoyment and utilization of Trinity resources, and

the importance of community and public service. This concept highlights the importance of alumni to the university.

Impact on Trinity University

Trinity has made significant commitments that demonstrate the importance of its alumni. In recent years, efforts to develop the career and admissions networks exemplify the benefits that engaged and enthusiastic alumni can deliver. Among the most important benefits identified by the LRPC:

- The reputation of Trinity alumni contributes to the reputation of the university as a highly selective institution.
- Engaged alumni improve the university's recruitment and admissions initiatives.
- Alumni provide enthusiastic and knowledgeable volunteer support for Trinity's mission and the alumni association's initiatives.
- Trinity alumni become ambassadors for the university in community involvement and service across the country and world.
- Alumni can offer real-world perspectives, support, and resources for the university's academic, cultural, and development programs.
- Through the alumni association, consistent extension of the University's branding messages enables more productive and effective marketing by Trinity to prospective students and their parents, prospective faculty, foundations and individual contributors, media, and public officials.
- Engaged alumni are more likely to become regular and life-long contributors to the university's development initiatives.

After considering the breadth and depth of benefits to alumni, students, and Trinity University from developing the TUAA into a leading example among American institutions of higher education, the LRPC assessed Trinity's current situation to help understand what steps the NAB must take to implement this important goal.

Situational Assessment

The Trinity University Alumni Association has a competent alumni office with strong, committed staff. It has a core group of very active alumni who regularly participate in a variety of activities, represented in the National Alumni Board and the TUAA chapter officers. A larger group, comprised of less than 1% of all alumni, participates selectively in various programs. The TUAA has responded in recent years by encouraging each chapter to offer a series of programs that allow alumni at different stages in their lives and with different interests to engage in at least one activity each year. Additionally, TUAA has institutionalized career and admissions chairs in each chapter, the annual “Making Connections” career networking event, and admissions outreach by alumni to accepted students.

While these initiatives have improved participation rates, Trinity alumni participate in activities and giving at noticeably lower rates than members of leading alumni organizations. We found that giving rates at comp institutions were as high as 60% vs. TU’s 23%. Additionally, Trinity University’s alumni and development offices are disadvantaged by both smaller numbers and shorter lengths of staff tenure compared to the leading alumni associations studied by the LRPC. Among the LRPC’s specific findings are reflections on communications, operations, staff and funding, the NAB, and first steps to bring the TUAA to the point it is prepared to consider options for becoming a leading alumni organization.

Communications

Trinity University alumni enjoy an adequate Internet presence that grows and changes with some regularity, though information about such changes may or may not be communicated effectively to alumni. Some efforts overlap, such as efforts to develop alumni networking profiles at the www.trinity.edu site while also inviting alumni to join a similar effort on the professional networking site www.linkedin.com, or the new Trinity University Network of Entrepreneurs (TUNE).

The AlumNet newsletter enables regular social, professional, and university updates and networking, along with interesting and pride-promoting alumni profiles. Occasionally, AlumNet misses the chance to promote important branding and messages (for example, highlighting the role of financial aid in alumni’s student lives as a compelling reason to participate in the capital campaign). This highlights the importance of including the role and importance of alumni in Trinity’s branding and messaging. It is used primarily by more recent alumni, suggesting that AlumNet misses the opportunity to reach more senior alumni with its well received and well regarded content; there may be opportunities to re-purpose AlumNet content in non-electronic formats to reach alumni who do not receive the electronic newsletter.

Trinity’s database of alumni contact information is incomplete. Of Trinity’s 30K total alumni, mailable addresses are on file for more than 24K and email addresses are on file for half that number. While it is impossible to maintain an entirely accurate list of this kind

because of the mobility of alumni and their frequently changing circumstances, the inability of Trinity to communicate with a significant number of its alumni compromises the TUAA's ability to fully contribute to the university's mission.

Trinity is working toward implementation of an integrated information technology infrastructure (sometimes called an enterprise resource planning, or ERP, implementation). Until achieving that goal, TUAA will inevitably suffer from the inability to integrate multiple lists and sources of information that may contain relevant, updated, or contradictory information about individual members.

Also, until Trinity has the tools and solutions necessary to maintain an integrated IT architecture for maintaining all information about TUAA members in a single, unified database, the alumni association will not be able to deploy the online tools that individuals and groups need to develop and maintain their own communication networks among multiple sets of people and interests that are relevant to them. These tools are frequently referred to as "Web 2.0" solutions, and are demonstrated by online tools such as Facebook or MySpace, Yahoo! Groups, and YouTube.

Such Web 2.0 tools are important because they can relieve resource constraints among TUAA staff and volunteers by allowing members to define their own recipient-relevant communication links with Trinity. Such solutions will permit the TUAA to more accurately and productively track the information and interests that help the staff and NAB recognize and analyze the kinds of programs that will improve alumni engagement.

Operations

Chapters of the Trinity University Alumni Association have capable leaders in the TUAA office and a solid set of guidelines for chapter officers to plan activities and communicate with their members. There are also several program templates those officers can use to replicate other events that have proved successful, and some direction on leadership development and succession planning.

Because minimal staff resources support the chapters across the country, chapter leaders need additional support in the form of "best practices" training and execution to maintain consistency and direction from year to year and – in some cases – program to program. The TUAA has taken steps to provide this support during the annual leadership development meeting of the NAB, but attendance by chapter leaders is an ongoing challenge.

Chapter officers have access to communications technology and databases that are limited by the resources available to TUAA staff. As Trinity moves toward integrated ERP and Web 2.0 solutions, access to technology and data should improve.

The primary obstacle to operational success appears to be financial, complicated by staff availability. Additional funding would allow TUAA staff to visit chapter leaders (improving relationships, motivation, training, and chapter development, and demonstrating the

university's commitment to chapters' success) and offer stipends or scholarships for chapter leaders who may not be able to afford to attend the annual leadership conference.

Human and financial resources

While the staff of the Trinity University Alumni Association is capable and dedicated, their resources are stretched thin across many priorities and many members. Our research showed that many peer institutions had up to double the staff based on alumni and/or student ratios. This personnel shortfall is doubly damaging. Staff involvement in individual alumni programs is limited, thus decreasing support for chapter effectiveness, while staff are frequently prevented from participating in ongoing training and education that would increase their effectiveness and productivity.

The TUAA has developed a significant body of evidence and experience that the most successful events engage alumni with a member of the Trinity University faculty who can offer an academic perspective on a topic of contemporary or local interest (for example, political science professors speaking about Presidential campaigns during election years, or art history faculty leading a tour of a museum exhibit). The LRPC learned that faculty members do not have any institutional incentives or encouragement to attend such events. Additionally, the TUAA does not have a system for identifying opportunities to engage faculty or staff who happen to be traveling to, or near, a city that is home to a TUAA chapter for a conference, a book tour, or a vacation. The LRPC feels that since the Alumni office influence on campus is low, particularly with academic departments, the level of engagement in outreach to alumni stakeholders is difficult foster.

National Alumni Board

The governing board of the Trinity University Alumni Association, the NAB, is a group of volunteers who are committed to Trinity University's mission and increasing alumni interaction and support to strengthen the relevance and voice of Trinity's alumni. Meeting three times a year, members prove their dedication through travel, commitment of time during the meetings and to projects conducted and completed outside the meetings, extensive participation in alumni activities planned by themselves or other alumni leaders, and the participation in the planning of succession and leadership among NAB members. To this point, the evaluation of NAB members' performance has been largely based on participation, rather than on any particular result or outcome of that participation.

The NAB works to consistently match its membership makeup to the overall complexion of Trinity's alumni; as a volunteer organization with participation requirements, it inevitably reflects the subset of alumni who are most able to attend, so the NAB must be diligent to recruit new members who can both attend and represent the increasing age, geographic, ethnic, and socioeconomic diversity of Trinity's alumni population. The NAB must also be careful to balance the ability of members to attend and participate with the talents, abilities, and productivity they bring to the promotion of Trinity and the TUAA's missions.

Overall Assessment

The status of the Trinity University Alumni Association, National Alumni Board, and alumni outreach programs might be best described as “adequate.” But that status appears sustainable only to the extent that the university, TUAA, and NAB are satisfied that:

- Only the relatively small portion of alumni who are enthusiastic about maintaining their relationship to Trinity will seek exposure to the variety of opportunities currently available to them, and
- A bare majority of alumni will occasionally learn about an event or program that will compel them to participate.

The members of the Long Range Planning Committee are not satisfied with such a scenario, either for the TUAA or for Trinity University. We believe there are significant benefits that we are missing out on by not being more than adequate. We need a scenario that identifies the cost benefit analysis of this improvement. The next section of this report outlines a series of recommendations to set the TUAA and the NAB on the path to becoming a leading alumni organization among institutions of higher education in the United States.

Recommendations to the National Alumni Board

Based on the research and analysis synthesized in this report, the Long Range Planning Committee respectfully submits the following recommendations to help the Trinity University Alumni Association and National Alumni Board achieve the goal of becoming a leading alumni association among our peer institutions and rivaling the national exemplars of alumni participation through service and value to our alumni.

Communications

For Trinity to conduct effective communications outreach to its alumni, it must first know how to find them. The LRPC recommends that the university dedicate sufficient resources to fill the gaps in its alumni contact database, to the extent that it is practicable, the law of diminishing marginal returns suggests that the cost of adding one more alumnus to the database will not offset the potential benefit of reaching that one alumnus. The University can reduce its long-term costs by completing the ERP and integrated IT infrastructure, referred to previously as Web 2.0, which will allow alumni to manage and maintain their personal data and networks. As we have seen in the recent Capital Campaign, effective contact with dedicated alumni yields an appropriate financial reward to the University.

Development of a comprehensive strategic communications program is crucial to both maintain the value of this investment and support achievement of all other Association objectives. With a complete database and the tools and incentives to maintain the records accurately, the Advancement and Communication committee can work hand in hand with University Communications to develop a strategic communication program that integrates with the University's institutional branding and communication strategy while increasing relevant and high impact communications to alumni of all generations.

The LRPC recommends a stronger relationship with University Communications, to ensure that alumni communication consistently reinforce the same messages adapted to the alumni audience. For example, in the same way the university currently markets itself based on what makes the institution and its students special, alumni communications would define what it means to be a alumnus/a, and why that person is unique.

A strategic communications program should move beyond the standard topics and tactics currently in place, and encompass topics which are not currently being effectively communicated to alumni, thus generating lost opportunities for stronger alumni connection to Trinity's mission and networks. Minimum recommendations for topics to be included in a strategic plan to be developed by the Advancement & Communication committee include:

- The impact various alumni award recipients have on Trinity, and their influence in their communities and the world.

- The role and impact of alumni engagement in Trinity's recruitment in the form of financial aid, outreach to accepted students, and cultivation of an engaged alumni mindset among students.
- Outreach to academic departments, clubs and teams to establish relationships with their graduates, develop a regular communications program with information and opportunities specific to that discipline, and invite alumni to participate in advising and mentoring opportunities.

Finally, the LRPC recommends that Trinity's Web site become a destination portal and repository for data and content that enable alumni to derive value from their relationship to the university. Trinity's alumni increasingly rely on the Internet to maintain personal and professional networks. A strategic communications program should incorporate existing resources, such as the alumni directory and events calendar; expansion of existing resources, such as the streaming audio and video content of lectures and performances; tools that allow alumni to obtain, share, discuss and index content they find valuable; and development of new resources, such as access to databases, journals, and periodicals through the library.

Operations

The LRPC recommends that the university and alumni association dedicate substantial and sufficient resources to develop best practices and methodologies so the TUAA and its chapters can invest in developing stronger local leadership while consistently executing and extending existing programs. On satisfactory conclusion of this goal, combined with the implementation of ERP and Web 2.0 tools recommended in the previous section, the TUAA and its chapters should have the tools to identify opportunities to selectively create new chapters and programs based on demand and interest expressed by alumni.

These recommendations may include adding staff resources, or engaging a consultant for a period of time, and should also include the financial resources to assure that TUAA staff can periodically and regularly visit chapter leaders or bring chapter leaders to the leadership development conference, or both.

Human and Financial Resources

Consistent with the preceding recommendations, the LRPC recommends that the university compare its current alumni and development staffing to the institutions it aspires to emulate and commit the financial resources necessary to achieve parity in at least productivity, if not in actual personnel. If the university elects not to pursue this strategy, the LRPC recommends that the TUAA and NAB scale back their expectations for achieving other suggested goals commensurately.

The LRPC also recommends that the university financially support the travel of faculty and staff to selected alumni activities and programs conducted by TUAA chapters, or in cities where the TUAA is trying to establish a new chapter. Likewise, the university should

develop an institutional policy to encourage or incent faculty and staff to participate in alumni activities when they are traveling for other purposes.

National Alumni Board

As the Trinity University National Alumni Board makes an effort to promote the TUAA into the top ranks of alumni organizations, it will also have to respond to new priorities and needs by changing some of its strategies and enhancing its accountability. Specifically, the LRPC recommends that each committee should set specific, measurable, and attainable two- and five-year goals to increase alumni participation and engagement. At a minimum, NAB and committee goals should include:

- Advancement: increasing the percentage of alumni participation in giving.
- Benefits: implementation of a statistical survey to assess value of tangible and intangible benefits for increasing engagement with Trinity among alumni both near the University and those no longer in proximity to San Antonio.
- Chapters and Networks: set quantitative and qualitative goals for training local leaders and develop online training and development content for all chapter officers.
- National Association and Student Affairs: establish measures of participation in and satisfaction with various traditions to help guide development of new programs that are likely to succeed in becoming true traditions.
- NAB: begin preparation for Trinity's transition to national collegiate rankings and prominence, creating opportunities for calls to action among alumni.
- TUAA: partner with University Communications to develop a communications program that will deliver consistent branding messages adapted to the alumni audience, while driving alumni to www.trinity.edu for maintenance of personal data, receipt of valuable University and Alumni information, and interactive dialogue with peers and the University.

The LRPC acknowledges that the development of such goals may reveal some overlap in committee priorities and responsibilities. That may require some consolidation, refinement, or reallocation of committee responsibilities. Regardless of the specific goals on which each committee decides to focus, the LRPC recommends that those goals aim to increase alumni engagement over time, in several forms:

- Increase alumni commitment of time, energy, and attention spent on their relationships with Trinity University;
- Increase alumni participation in development and advancement efforts;
- Improve turnout and attendance at alumni and chapter events;
- Plant the seeds of alumni engagement early in students' lives; and,
- Consider the entire lifecycle of alumni engagement in activities that support occupational and social priorities shortly after graduation, that are sensitive to family priorities for alumni in their 30s and 40s, and that respond to maturing interests in culture, learning, and group-oriented activities as alumni and their children get older.

The LRPC also recommends establishing new standards of accountability for achieving these goals, which should also contribute to increased alumni engagement. For example, once the NAB and its committees have set specific and measurable goals, the LRPC recommends announcing those goals to all alumni through the university's multiple avenues of communication (the alumni magazine, AlumNet, www.trinity.edu, and perhaps a unique mailer that doubles as a request for participation in the capital campaign). The NAB should also deliver quarterly updates to all alumni on its progress toward achieving the goals, and consider policies and strategies to support committees that are not making adequate progress. Such strategies include the eventual replacement of committee chairs who demonstrate a repeated inability to make progress.

Because it is important to celebrate the achievement of goals, the LRPC recommends that the NAB work to secure Trustee participation to celebrate achievements with a series of gifts to the capital campaign or university endowment.

Based on these recommendations, outlined by the LRPC, we believe the TUAA and the NAB will establish a track record of measurable achievements and build a level of trust, accountability, and alumni engagement that will foster the enablement of our long-term goal of significantly increasing alumni involvement, participation and ultimately, the creation of a top tier alumni association.

Conclusion

The LRPC cautions that the many suggestions and examples included in this report are only that. There is no crystal ball, and no way to anticipate all the changes and ideas that may emerge from changes of this magnitude, much less from the ongoing and unpredictable processes of evolution in communications, technology, economics, and society.

Moreover, the LRPC acknowledges that the university does not have enough resources to leverage every good idea that will emerge. That is why the LRPC instead focuses its recommendations on creating an institutional and technological infrastructure that provides alumni with the leadership capacity and tools/processes to enable alumni to respond and adapt on their own.

If successful in implementing such recommendations, the LRPC believes that alumni can generate most of the routine work and resultant value of the alumni network on their own. That should allow the TUAA and NAB to prioritize a few significant programs and respond rapidly and effectively to emerging opportunities and changes that enable achievement of the LRPC's recommended goal:

Through service and value to our alumni, become a leading alumni association among our peer institutions and rival the national exemplars of alumni participation.

Achieving this ambitious goal requires that the university, NAB, and TUAA leverage the importance of reciprocity in the valuable relationship between alumni and the university, plant the seed of the value in that relationship early in students' relationships to Trinity and each other, dedicate sufficient resources to achieve the alumni organization's most important objectives, and steadily improve alumni engagement and satisfaction.

Appendix 1- Initial Contact Targets for Comparative Universities

	University	Director of AR	Phone Number	Email
Dave M.	Williams, MA	Wendy W. Hopkins	(413)-597-3543	Wendy.W.Hopkins@williams.edu
Dave M.	Washington, MO	Julia Simpson	(314) 935-5212	Julia_Simpson@wustl.edu
Dave M.	Colorado College, CO	KARRIE WILLIAMS,	(719) 389-6775 or 6776	alumni@coloradocollege.edu
Dave M.	University of Denver, CO	Rob Revitte	(303) 871-2738	rrevitte@du.edu
Dave M.	TCU, TX	Rebekah Dunlap Waits	817-257-5034 (817) 257-7803	r.waits@tcu.edu
Dave M.	Northwestern, IL	Sarah Pearson VP for University Development	Assistant's Contact Number (847)-491-7368	sarah-pearson@northwestern.edu
Dave S.	Duke, NC	Elizabeth Hogan	(919) 660-7714	elizabeth.hogan@duke.edu
Dave S.	University of Iowa, IA	Chad Ruback	(319) 335-8595	chad-ruback@uiowa.edu
Dave S.	University of Southern California, CA	Olabisi Carr	(323) 442-1381	carr@usc.edu
Dave S.	Stanford, CA	David Vargas	(650) 725-0677	dvargas@stanford.edu
Dave S.	Brigham Young University, UT	Palmer, Linda	(801) 422-2533	linda_palmer@byu.edu
Dave S.	Emory, GA	Allison Dykes	404.727.8878	adykes@emory.edu
Celeste	Washington & Lee, VA	Waller Dudley	(540)-458-8470	wdudley@wlu.edu
Celeste	University of Richmond, VA	Kristin J. Woods	(804) 289-8026	kwoods@richmond.edu
Celeste	Bucknell, PA	James Warren	(570)-577-3223	jdw027@bucknell.edu
Celeste	Georgetown, DC	James M. Langley VP for University Development	(202) 687-0454	langleyj@georgetown.edu
Celeste	Dartmouth, NH	Nels Armstrong	(603) 646-2259	Nels.Armstrong@Dartmouth.EDU
Celeste	University of Virginia, VA	Valerie S. Lawson	(276) 328-0128	alumni@uvawise.edu
Celeste	Harvard, MA	John P. Reardon Executive Director of Harvard Alumni Activities	(617)-495-5327	jreardon@harvard.edu
Kim	Southwestern, TX	Georgianne Hewett VP for Alumni and Parent relations	(512) 863-1584	hewettg@southwestern.edu
Kim	University of Texas, TX	Patricia A. Yandell	(972) 883-2586	yandell@utdallas.edu
Kim	University of Texas at San Antonio, TX	Jane Findling	(210) 458-4133	jane.findling@utsa.edu
Kim	Baylor, TX	Deanna Sheaffer	(713) 348-3732	sheaffer@rice.edu
Kim	St. Mary's, TX	Peter Hansen	(210) 436-3324	phansen@stmarytx.edu
Kim	Tulane, LA	Cynthia Hayes	(504) 862-8017	chayes@tulane.edu
Kim	Southern Methodist, TX	Jana Rentzel	(214) 768-1303	jrentzel@smu.edu
Kim	Rice, TX	Mark E. Delos Reyes Davis	713-348-4057	Davism@rice.edu

Appendix 2 – Data from Detailed Comparative Research

University	TCU	Williams
Number of Alumni	61,000	25,000
Split Undergrad/Grad	41,000	Mostly Undergraduates
Number of Chapters	20	75
Number of Events/Chapter	2/3/5 based on size	6/25 based on size - Generally Happy Hour, Professor and Service projects
Percent of Alumni Giving	25%	61%
Chapter Board Makeup	6/8/12 based on size	1/12 based on size
International Orientation	Nothing Formal	UK/HK/Rotating throughout Europe
Number of Alumni Staff	12	6
	1 Assistant Vice Chairman/ 3 Assistant Directors 5 Tech / 1 Senior Assistant / 1 Admin	
National Alumni Board Makeup	Chapter Reps are Official Board Members	20 Members with 3 year terms - Chapters Board is not on NAB
National Alumni Board Responsibilities	Task Force Orientation	Task Force Orientation
Key Alumni Contact	Rebekah Dunlap Waits -(817) 257-7803 or 817-257-5034	Wendy W. Hopkins -(413)-597-3543
Other Key Facts	Current Tasks are Lifelong Learning, Rebuilding the Houston Chapter and Homecoming and Reunions	Current Tasks are Volunteer recognition, Inclusion/engagement and providing a rotating person to the Board of Trustees
	Undergrad participation is high while Grad is low	Honor 5/6 Alums each year for Achievement
	There are special interest groups for Nursing Ranching and the MBA for example	3 NAB Meetings per year
		There are special interest groups for Color,Gay, etc.

Appendix 2 – Data from Detailed Comparative Research

University	University of Denver	Northwestern
Number of Alumni	110,000	190,000
Split Undergrad/Grad	30,000 Graduates	1/3 Graduates
Number of Chapters	Varies from 9-12	50
Number of Events/Chapter	3 per year on average	4 but a mix of different people at each event is the target
Percent of Alumni Giving	6%	30% for Undergraduates
Chapter Board Makeup		Varied from 1 to 4 members
International Orientation	International Studies has meetings in DC. There are 2500 Alums located internationally. They also have a Graduate school of international studies.	Minimal
Number of Alumni Staff	Reduced to 7, going down to 3	4 specific to managing the Chapters as part of the overall Alumni Relations and Development staff Director /AD/ Admin / Coordinator
National Alumni Board Makeup	An Alumni Council has 23 members, 4 of which are part of the main city chapters and there are 4 officers. There are 16 members of a strategy team	Changes based on annual focus
National Alumni Board Responsibilities	4 main tasks this year	
Key Alumni Contact	Rob Revitte 303 871-4153 or (303) 871-2738	Catherine Stembridge 847-491-3246
Other Key Facts	Standing Committees of Membership, Communications and Operations (Chap Leadership) and Current Specific Tasks are A need to get to Campus, Parking and Rail Passes for Alumni, Academic Open Houses, Helping to Brand the DU Name	Some areas can be only for Events
	We should check on being PCUAD.org members. They have 23 metrics categories and 300 measurements from 40 schools. Started by Chris Marshall at Lehigh	There are 60,000 Alums in Chicago
	Academic units have their own Alumni Relations staff	
	They have strong law and recent grad focuses	
	They have 32,000 alums in the front range	
	They use faculty trips and sporting events for chapter events and will have 30 Chancellor visits next year	
	They have 40% CO enrollment and 42,000 CO alums	

Appendix 3– Additional Comparative Research Data

University of Richmond

Kristin Woods

Executive Director of Alumni Relations

Current Situation

- Working in an ongoing program, not facing a capital campaign or other major initiative as impetus for analysis/change

Comparative Factors

1. Budget/Staffing
 - Relatively small staff (4 people)
 - Alumni department provides standardized budgets to local chapters and evaluates
2. Student/Alumni Makeup
 - Approx. 42K alumni
 - Regional draw, largely concentrated in eastern and southern states (both origin and current residence)
3. Governance
 - Local chapters are given significant authority and responsibility to run operations

Challenges/Priorities

- Very similar challenges as Trinity and other schools
- How to segment and engage alumni by age, geography and affinity
- Shifting focus from a social/networking organization to one focused on facilitating lifetime learning. Will implement an alumni college this year and increase professors touring to meet with local chapters.
- Increasing use of technology to facilitate connections. Beyond e-newsletters, they stream lectures, discussions and meetings online for alumni. Use message boards that alumni can post to without moderation.

Bucknell University

Laura Denbow

Director of Alumni Relations

Current Situation

- New director of alumni relations just hired in December, was formerly director of career development services at Bucknell for 8 years, selected over university alumni candidates. Bucknell is gearing up for a capital campaign and is using these two major events to completely rethink/restructure alumni relations.
- Moving away from AR being an implementation department to being a strategic driver that develops the outreach strategy/infrastructure but outsources all implementation to an in-house event management department that services development, admissions, etc.

Comparative Factors

1. Budget/Staffing
 -
2. Student/Alumni Makeup
 - Very comparable to TU, small largely liberal arts school with some professional programs.

Challenges/Priorities

- Integrating career development and alumni relations to add value for older alumni
- Internal relationship building to break down silos within the university and create linkages between academic departments, development and alumni relations in order to create communities of interest based on alumni affinities (not just organizational affinity but interest/major areas as well). Win win for academic departments because they want ongoing relationships with alumni.
- Reviewing the volunteer model of local club structures - currently older alumni are alienated because clubs are dominated by younger alumni who want happy hours, and there is little perceived value for older alumni.
- Strongly integrating parents, not just alumni, as professional contacts for facilitating programs, networking
- As alumni relations department becomes more strategic in its approach, career development plans for staff will be critical. Some staff may need to rethink their career goals or be transferred to implementation departments, etc.

Appendix 3– Additional Comparative Research Data

Georgetown University

Bill Reynolds

Associate Vice President, Alumni Relations & Development

Current Situation

- Overall, their program feels stagnant and not particularly inclined to improvement

Comparative Factors

1. Budget/Staffing
 - Approx 6 staff, provide limited funding to local clubs. Line between AR and Development appears less defined than at other schools.
2. Student/Alumni Makeup
 - Larger school with both liberal arts and professional programs
 - Equally graduate and undergraduate makeup
 - Similar emphasis on engagement and ethics (Jesuit school)
3. Governance
 - Local clubs are chartered, self-funded with dues, and locally operated nearly independently of the alumni office.

Challenges/Priorities

- Traditionally strong local club organizations in major metros (NYC, DC, Boston, Chicago, London, Paris) but much weaker in smaller/western areas. Heavy emphasis on international alumni network due to School of Foreign Service and international emphasis in undergrad and grad programs. Working to facilitate growth of smaller clubs outside of main metros, but recognize that most development revenues will come from the major markets
- AR focuses heavily on strategy of promoting prominent alumni to raise prestige of school
- Technology: online systems are limited to monthly e-newsletter, searchable database and calendars. No message boards or streaming video, etc. Special events typically not recorded for the web.