
Temple University Alumni Association

Leadership Summit

Contemporary Alumni Engagement

April 1, 2023

Chris Marshall – Founder & CEO



Agenda

Agenda

- Change
- Integrated Advancement Model
- Strategic Planning 101
- Engaging Recent Alumni
- Regional Alumni Engagement
- Alumni Boards/Councils Strategies
- Wrap-up

Change







Integrated Advancement Model

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- How comfortable are we with a more direct connection between alumni engagement and fundraising?
- What is the role of alumni engagement around?:
 - Identification
 - Cultivation
 - Solicitation
 - Stewardship

Integrated Advancement Model

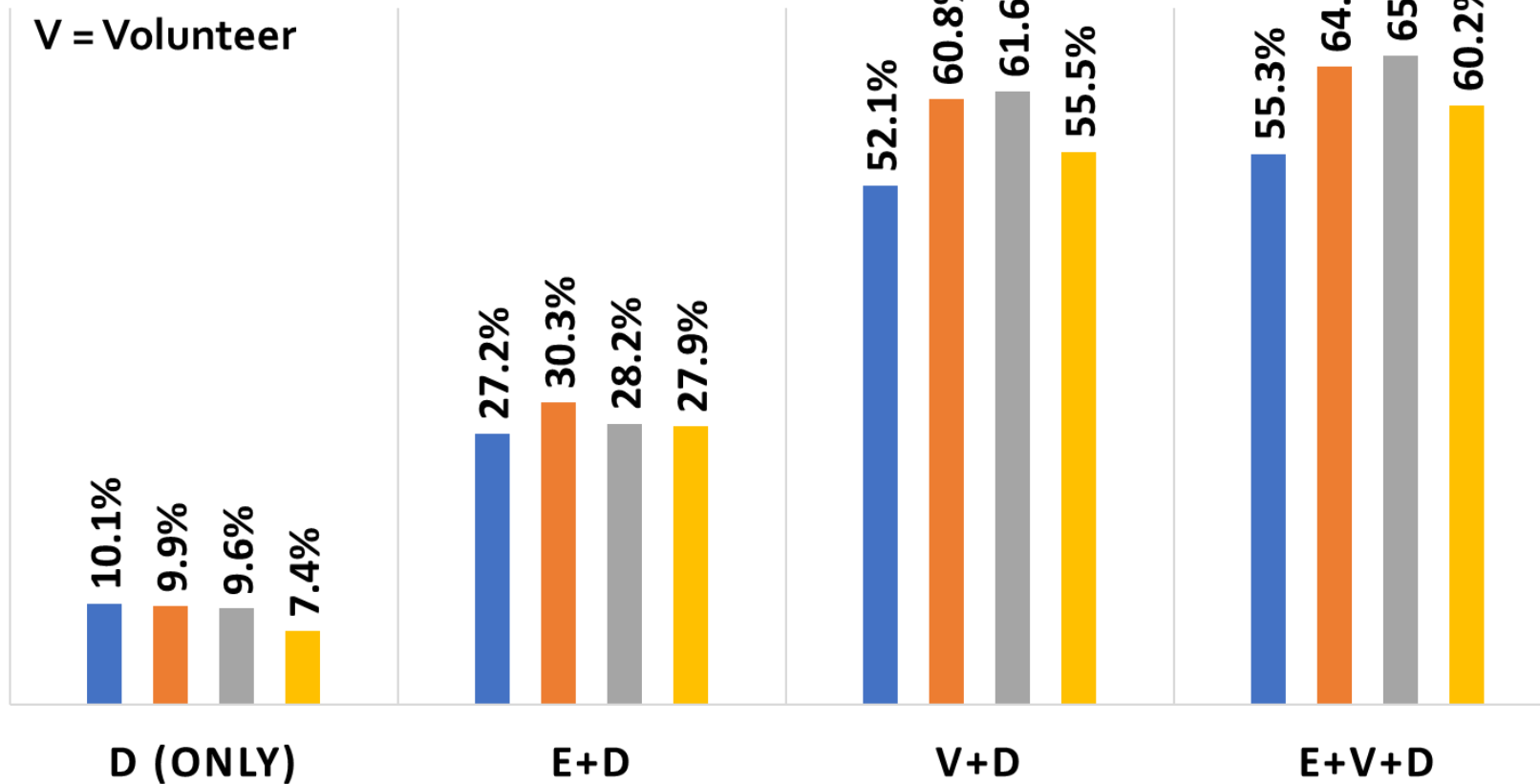
GIVING PERCENTAGE – PUBLIC

■ 2019 ■ 2020 ■ 2021 ■ 2022

D = Donor

E = Event Attendee

V = Volunteer

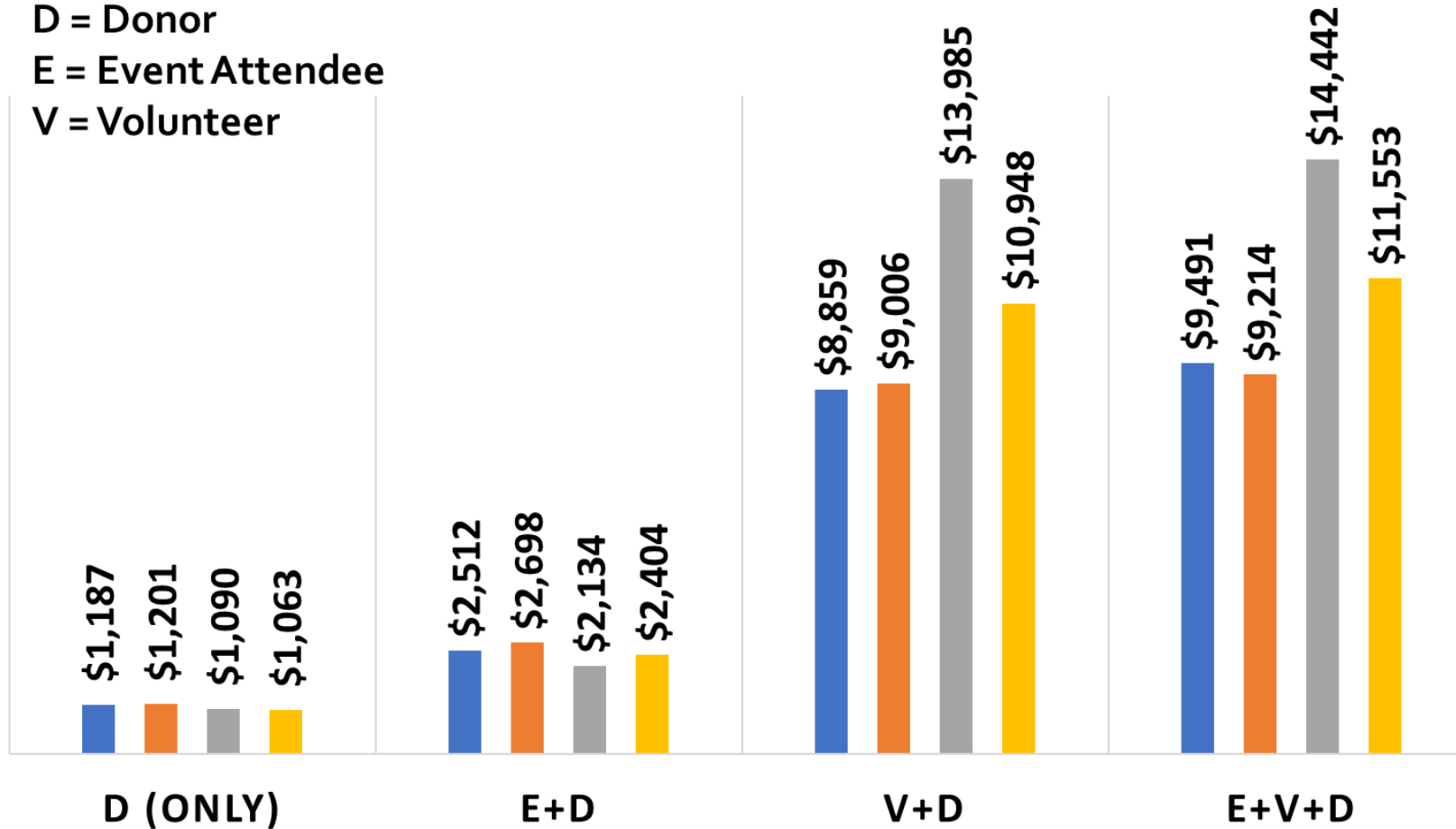


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Strategic Planning 101

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Strategic Planning 101



Values

- Values are enduring, passionate, and distinctive core beliefs.
- Guiding principles that never change.
- Values are deeply held convictions, priorities, and underlying assumptions that influence your attitudes and behaviors – both internally and externally.

Strategic Planning 101



Vision

- A vision statement focuses on tomorrow and what an organization wants to ultimately become.
- The desired future state.
- The best visions are:
 - ✓ **inspirational**
 - ✓ **clear**
 - ✓ **memorable**
 - ✓ **concise**

Strategic Planning 101



Mission

- A mission statement focuses on today and what an organization does to achieve the vision.
- Highest level description of the work you do every day to get to that vision.
- The roadmap to the vision.

Strategic Planning 101



Priorities

- Priorities are the initiatives or outcomes that an organization hopes to achieve over a designated time period. They are often what the organization wants to achieve first out of a larger list of tasks.
 - Focus areas
 - Objectives
 - Goals
 - “Buckets”
 - “Lanes”
 - “Pillars”
 - “Planks”

Strategic Planning 101

- The planning is more important than the plan
- Inclusive – ACE staff, TUAA Alumni Board, colleges and schools, affinity and regional groups, campus partners, and development colleagues.

“Involve them in planning the battle and they won’t battle the plan”

- Focus groups for even broader buy-in
- Alignment with university-wide strategic plan

Engaging Recent Alumni

Engaging Recent Alumni

Our young alumni show promise,
but the institution won't realize
their potential for several decades



Graduates of the Last Decade

Our senior volunteers have faithfully
championed the institution, but are
now preparing to pass the torch



Longtime Supporters

Engaging Recent Alumni

80M

Millennials born in 1980–1999 will constitute 46% of the workforce by 2020 and 75% of the workforce by 2025

86%

of Millennials want to use specific skills, talents, or expertise to help their alma mater

75%

of Millennial alumni are more likely to donate to favorite charity before alma mater

35 to 45

is the optimal age to acquire a volunteer, while the average age for a donor to give their first major gift is age 45 to 55



Mid-Career Alumni

Engaging Recent Alumni

RULE #1



Make It Easy to Say Yes

Shift to one-time, short-term,
or episodic engagements
with clearly communicated
parameters and purpose

TACTICS

- 24- to 72-Hour Volunteer Strike Forces
- Reunion "Micro-volunteer" Roles
- 30-Minute Mentorship

Engaging Recent Alumni

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RULE #2



Meet Them Where They Are

Create convenient and accessible volunteer roles that allow alumni to participate in their workplaces, regions, or online

TACTICS

- Corporate Alumni Chapters
- Social Media Ambassadors
- Digital Content Connectors

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RULE #3



Broker Smarter Matches

Proactively identify high-potential alumni volunteers and match them with mass-customizable, skills-based roles

TACTICS

- Volunteer Affinity Detectors
- High-Potential Alumni Leader Pipeline Development
- Faculty-Friendly Classroom Volunteer Opportunities

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RULE #4



Embrace the "Me" Factor

Emphasize the two-way value proposition for volunteers and communicate their impact

TACTICS

- "Insider Access" Volunteer Conference
- Digital Badges, Online Leaderboards, and Gamification Tactics
- Online Opportunity Portals for Cause Communities

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RULE #5



Cultivate Campus Allies

Partner with other units to develop roles that offer substantive experiences with students and faculty

TACTICS

- "Ghost Volunteer" Identification Form
- Venture Fund for Innovative Volunteer Roles
- University-Wide Volunteer Engagement Offices

Engaging Recent Alumni

- How do we plant the seeds of alumni loyalty while they are current students?
- How do we add value to the lives of our most recent graduates?

Regional Alumni Engagement

Regional Alumni Engagement

- Regional Chapter/Club model
- Regional activity model
- Affinity and Special Interest groups

Regional Alumni Engagement



**Find alumni
near you.**



Alumni Boards/Councils Strategies

Alumni Board/Council – Governance

- Less: Bylaws and Robert's Rules of Order
- More: Simple operating guidelines
- Temple: governance project... universal documents for all groups... fiduciary role for some groups... adoption of university policies (social media, annual planning, conflict of interest, etc)

Alumni Board/Council – Composition

- Average size = 24-26 (central) and 16-18 (college/school/unit)
- “Reflective” of the alumni population
- Officers (3)
 - President
 - Past President
 - President-Elect

Alumni Board/Council – Terms

- 2 or 3 year terms
- 2 terms
- Additional years for executive track and committee chairs
- Goal of renewal and fresh perspectives from new members

Alumni Board/Council – Committees

- Less: standing
- More: task force and working group
- Typical committees: Executive and Nominating (Awards)
- Task forces and working groups aligned with identified strategic priorities and the staff organizational structure
- Committee membership includes members of the board/council and others with relevant knowledge for committee work (serves as pipeline for future board/council membership)

Alumni Board/Council

- What do we mean by “posture” of the Alumni Board/Council?
- *“A good board should have their noses in and their fingers out.”*

Q & A and Full Group Discussion

Wrap-up

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