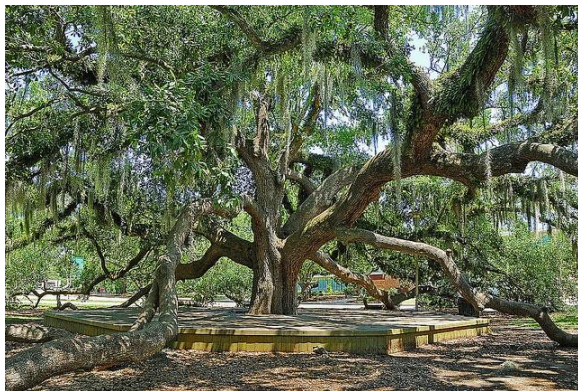


Alumni Relations Program Review for
Southeastern Louisiana University

April 27, 2016



Chris Marshall
Senior Vice President

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STUDY OBJECTIVES

STUDY OBJECTIVES

- In December 2015, Grenzebach Glier and Associates (GG+A) was engaged by Southeastern Louisiana University (SLU) to conduct a review of SLU's Alumni Relations program.
- The key areas of analysis included investigating and providing recommendations on the following :
 - An assessment of the perceived strengths and challenges of current Alumni Relations activities and recommendations for the most high-value, high-impact initiatives that will strengthen the current program;
 - An assessment of the Alumni Relations team's capacity and the division of labor to meet its stated objectives and the expectations of leadership around stated program areas;
 - Clearly outlined measurable objectives for all programmatic recommendations made for Alumni Relations; and
 - An Alumni Relations strategic roadmap for FY17 outlining the activities needed to implement the programmatic recommendations in the report.



STUDY METHODOLOGY

STUDY METHODOLOGY

- GG+A began the review process in January 2016. Our work contained the following elements:
 - Review of materials, data, and documentation from Alumni Relations and Advancement to define and understand programs and practices currently in place;
 - Completion of on-site and phone interviews with 52 individuals throughout January and February 2016. Meetings included University leadership, Advancement staff, Alumni Relations staff, University alumni, key volunteer leaders; and
 - Creation of a final report detailing all observations and recommendations.





OBSERVATIONS

OBSERVATIONS

GENERAL

- The Vice President for University Advancement, Wendy Lauderdale, has a professional and best practice approach to SLU's overall advancement strategy.
- Interviewees indicated that school spirit is back at Southeastern and the Alumni Association has been credited, in part, for pushing and promoting the sense of pride that exists today.

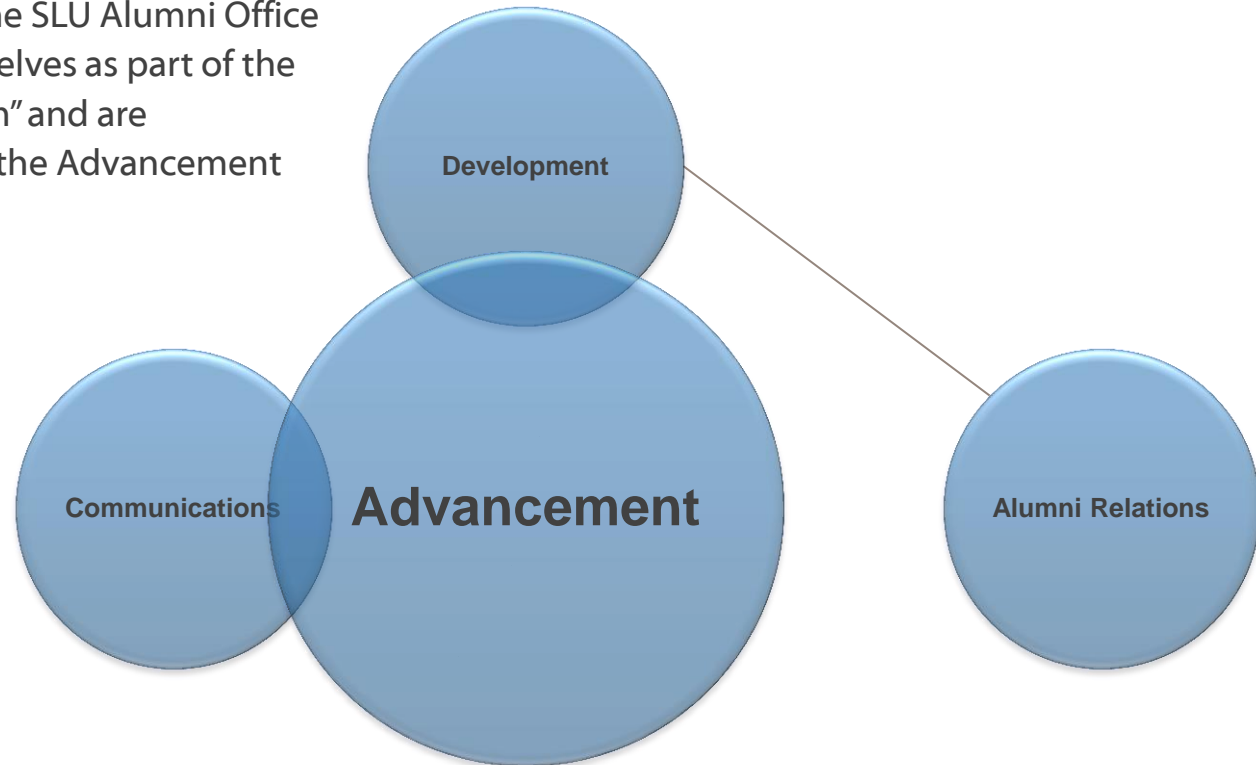
OBSERVATIONS

GENERAL

- The perception of interviewees, however, was that the Southeastern Louisiana University Alumni Office (SLUAO) and therefore the Alumni Association, is still holding onto the notion of an old “friendraising vs fundraising” model.
- GG+A observed an, “us vs them” attitude that has formed between the Alumni Office staff and Advancement staff. Described by one interviewee, *“There is an innate distrust between the Alumni Association and Advancement.”*
- GG+A believes that the physical location of the Alumni Office staff (in the Alumni Center) away from staff in Dyson Hall presents a challenge and exacerbates the “us vs them” mentality.

FINDINGS – GENERAL

- GG+A discovered a perception from interviewees that the SLU Alumni Office does not see themselves as part of the “Advancement team” and are disconnected from the Advancement operation.



OBSERVATIONS

ALUMNI POPULATION

Alumni Population – Class Year

- Compared to other institutions, Southeastern Louisiana University has a very young/recent alumni population. Over one-third (33.4%) of alumni have graduated in the past 10 years (2006-2015) and 58.5% in the past 20 years (1996-2015).

	Alumni Count	% of Total Alumni
Alumni who graduated between 2006-2015	20,856	33.4%
Alumni who graduated between 1996-2005	15,672	25.1%
Alumni who graduated between 1986-1995	9,228	14.8%
Alumni who graduated between 1976-1985	8,009	12.8%
Alumni who graduated between 1966-1975	6,322	10.1%
Alumni who graduated prior to 1965	2,333	3.7%
Total Mailable Alumni	62,420	100.0%

58.5%

Source: Self-reported.

OBSERVATIONS

ALUMNI POPULATION

Alumni Population – College

- More than three quarters of Southeastern alumni (78.8%) have graduated from the three largest colleges: College of Arts, Humanities, and Social Sciences, College of Business, and the College of Education.

	Alumni Count	% of Total Alumni
College of Arts, Humanities and Social Sciences	17,605	28.2%
College of Business	17,155	27.5%
College of Education	14,403	23.1%
College of Nursing and Health Sciences	8,360	13.4%
College of Science and Technology	2,040	3.3%
Other	2,857	4.6%
Total Mailable Alumni	62,420	100.0%

78.8%

Source: Self-reported.

OBSERVATIONS

ALUMNI POPULATION

Alumni Population – Geography

- 82.5% of alumni reside in the state of Louisiana. 42.3% of Southeastern alumni reside within the three parishes that include and border Hammond, LA (located in Tangipahoa Parish). St. Tammany Parish has the largest concentration of Southeastern alumni (10,346, 16.6%).

	Alumni Count	% of Total Alumni
State of Louisiana	51,473	82.5%
St. Tammany Parish, LA	10,346	16.6%
Tangipahoa Parish, LA	9,958	16.0%
Livingston Parish, LA	6,091	9.8%
Jefferson Parish, LA	4,086	6.5%
Ascension Parish, LA	3,162	5.1%
Total Mailable Alumni	62,420	100.0%

} 42.3%

Source: Self-reported.

OBSERVATIONS

ALUMNI POPULATION

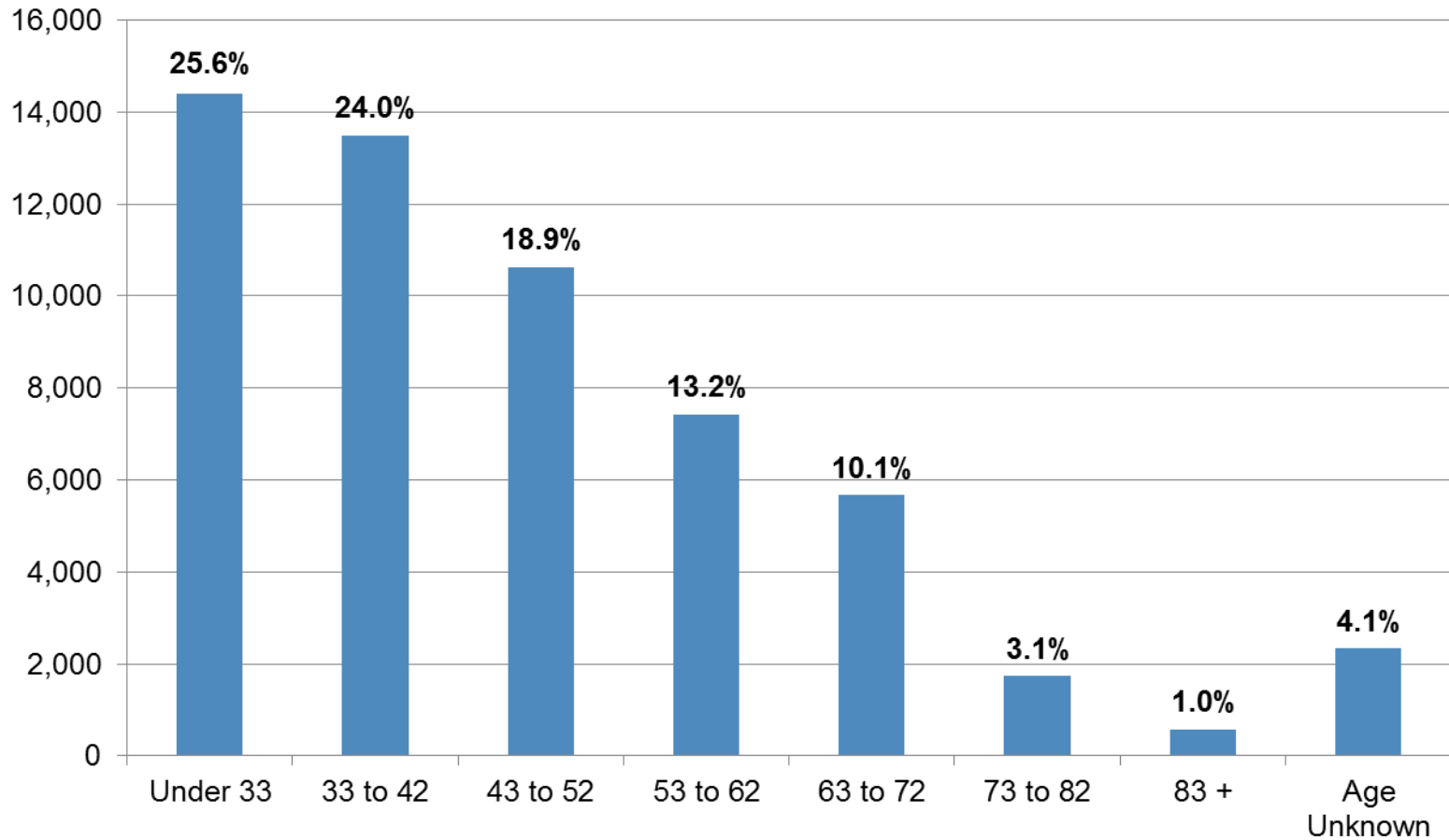
Alumni Population – Undergraduate Alumni – Age

- Over 25% of Southeastern’s undergraduate alumni are under the age of 33 years old – and, by industry standards, considered young alumni. Nearly half (49.6%) of the undergraduate alumni are under the age of 42 years old.

Age of Undergraduate Degree Alumni		Total Alumni	%	
Under 33		14,408	25.6%	} 49.6%
33 to 42		13,475	24.0%	
43 to 52		10,632	18.9%	
53 to 62		7,422	13.2%	
63 to 72		5,661	10.1%	
73 to 82		1,730	3.1%	
83 +		562	1.0%	
Age Unknown		2,329	4.1%	
Total		56,219		

Source: Self-reported.

ALUMNI POPULATION – UNDERGRADUATE ALUMNI – AGE



OBSERVATIONS

ALUMNI POPULATION

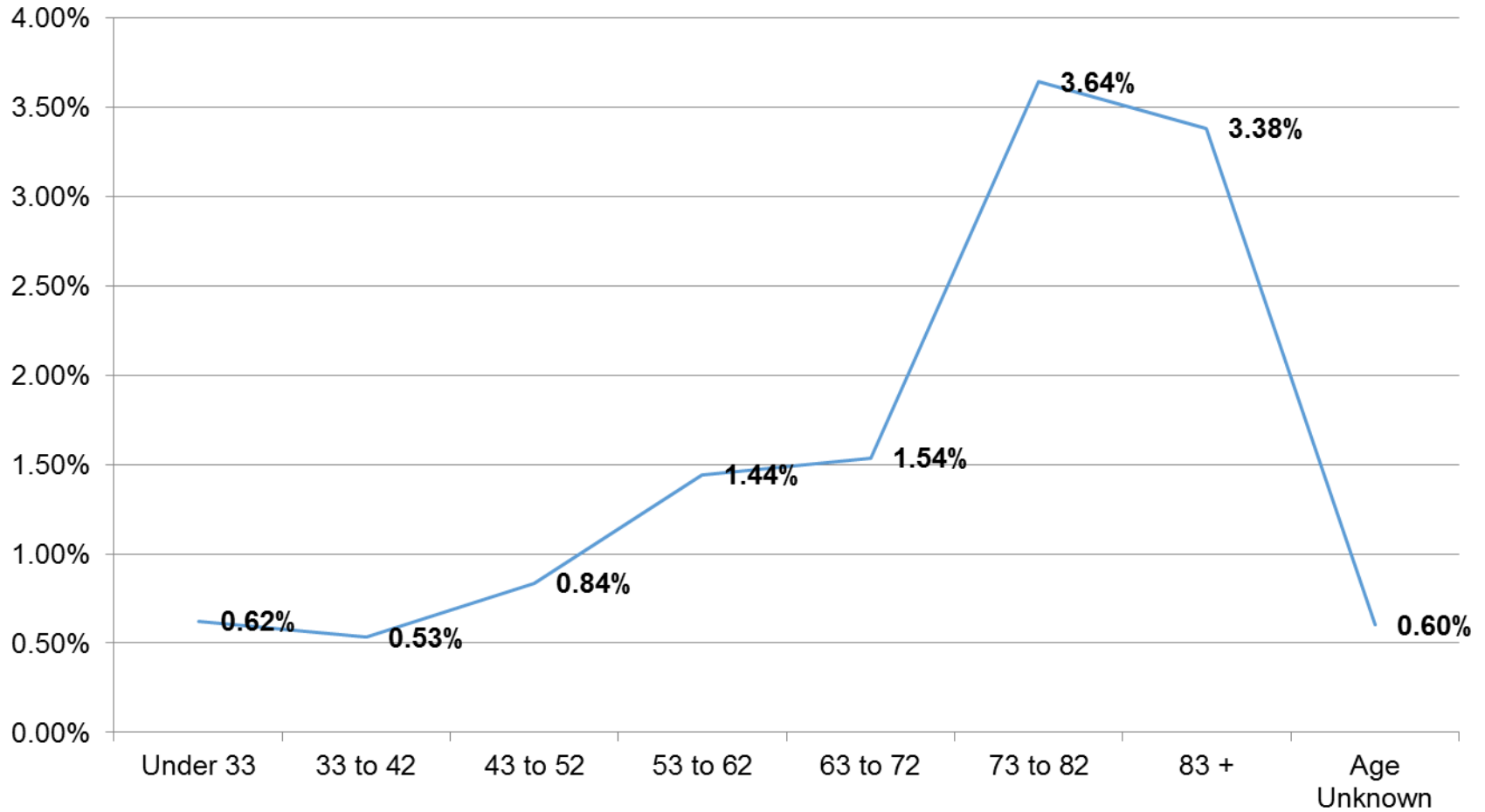
Alumni Population – Undergraduate Alumni – Age (Event Attendance)

- Younger alumni are less likely to attend SLU events compared to the older alumni populations. The lowest percentage event attendance is in the 33 to 42 years old age group (0.53%). The highest percentage event attendance is in the 73 to 82 years old age group (3.64%).

FY2015 Event Attendance - Undergraduate Degree Alumni	Attendees	Total Alumni	%	
Under 33	90	14,408	0.62%	
33 to 42	72	13,475	0.53%	Low
43 to 52	89	10,632	0.84%	
53 to 62	107	7,422	1.44%	
63 to 72	87	5,661	1.54%	
73 to 82	63	1,730	3.64%	High
83 +	19	562	3.38%	
Age Unknown	14	2,329	0.60%	
Total	541	56,219	0.96%	

Source: Self-reported.

ALUMNI POPULATION – UNDERGRADUATE ALUMNI – AGE (EVENT ATTENDANCE)



OBSERVATIONS

ALUMNI POPULATION

Alumni Population – Undergraduate Alumni – Age (Donors)

- Younger alumni are less likely to make a gift to SLU compared to the older alumni populations. The lowest percentage of donors is in the 33 to 42 years old age group (0.76%). The highest percentage of donors is in the 83 years old and above age group (8.72%).

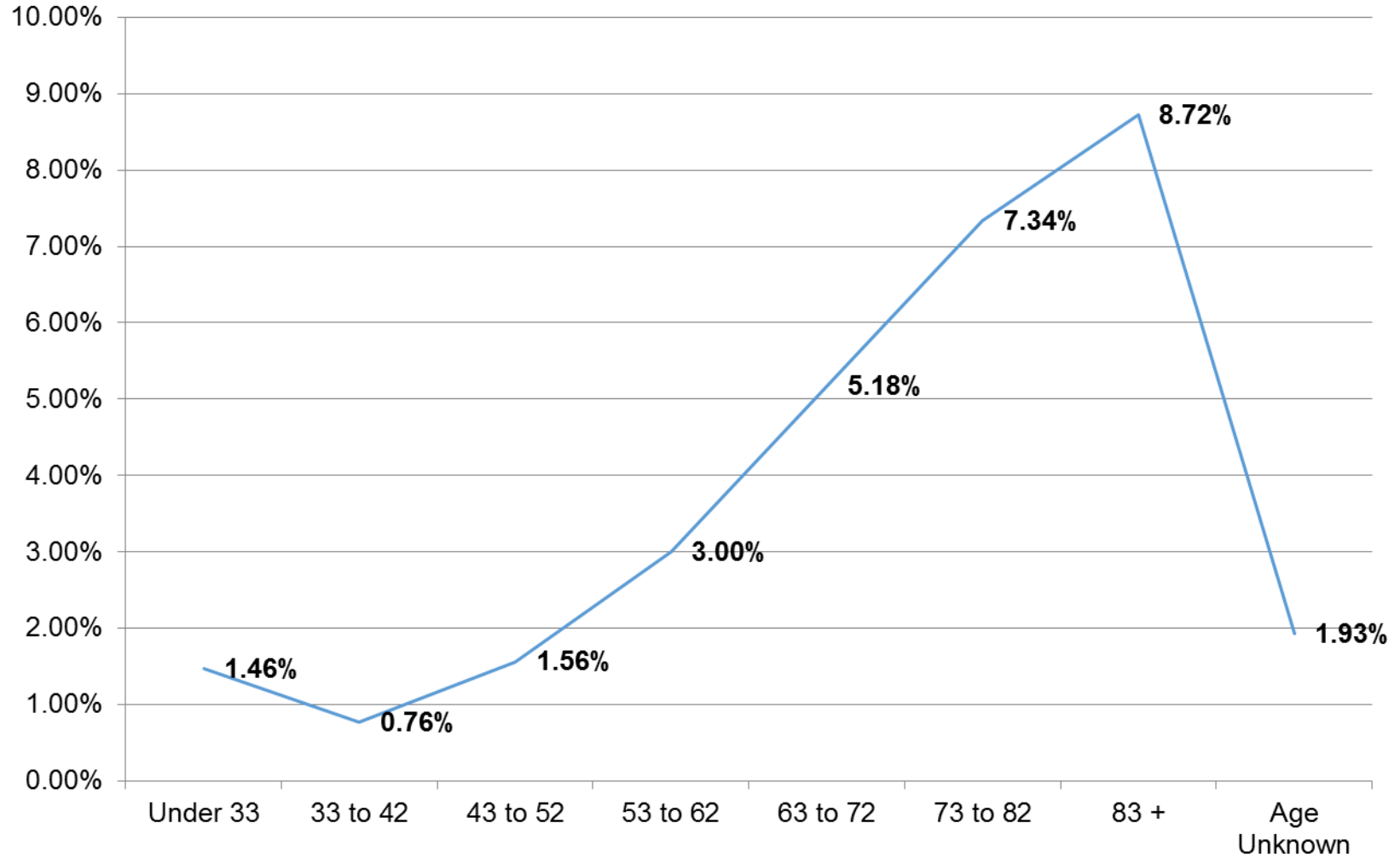
FY2015 Donors - Undergraduate Degree Alumni	Donors	Total Alumni	%
Under 33	211	14,408	1.46%
33 to 42	103	13,475	0.76%
43 to 52	166	10,632	1.56%
53 to 62	223	7,422	3.00%
63 to 72	293	5,661	5.18%
73 to 82	127	1,730	7.34%
83 +	49	562	8.72%
Age Unknown	45	2,329	1.93%
Total	1217	56,219	2.16%

Low

High

Source: Self-reported.

ALUMNI POPULATION – UNDERGRADUATE ALUMNI – AGE (DONORS)



OBSERVATIONS

ALUMNI POPULATION

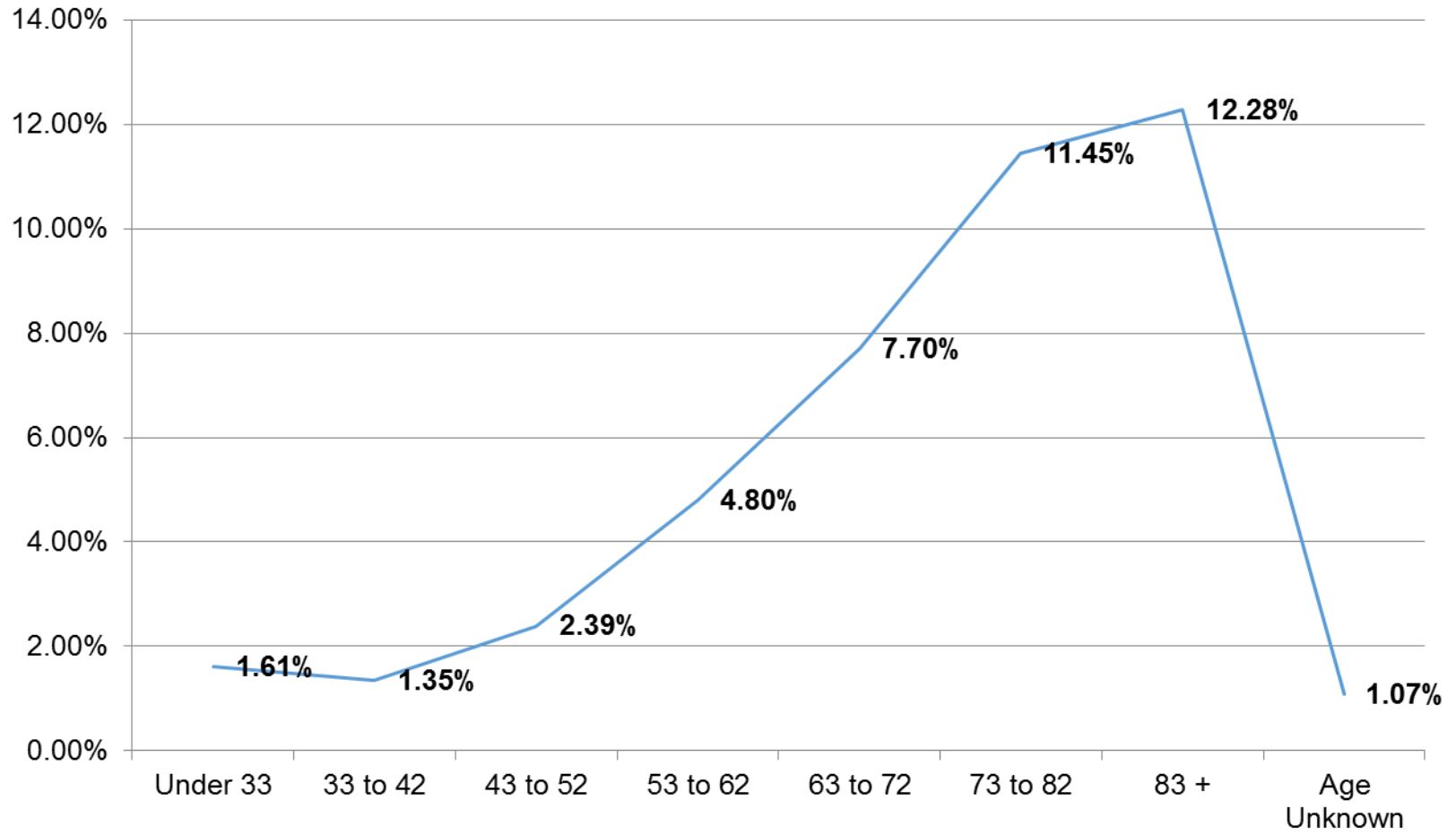
Alumni Population – Undergraduate Alumni – Age (SLUAA Membership)

- Younger alumni are less likely to be members of the SLUAA compared to the older alumni populations. The lowest percentage of members is in the 33 to 42 years old age group (1.35%). The highest percentage of members is in the 83 years old and above age group (12.28%).

Active Current SLUAA Members - Undergraduate Degree Alumni	Members	Total Alumni	%	
Under 33	232	14,408	1.61%	Low
33 to 42	182	13,475	1.35%	
43 to 52	254	10,632	2.39%	
53 to 62	356	7,422	4.80%	
63 to 72	436	5,661	7.70%	High
73 to 82	198	1,730	11.45%	
83 +	69	562	12.28%	
Age Unknown	25	2,329	1.07%	
Total	1752	56,219	3.12%	

Source: Self-reported.

ALUMNI POPULATION – UNDERGRADUATE ALUMNI – AGE (SLUAA MEMBERSHIP)



OBSERVATIONS
STRATEGIC PLAN

- GG+A observed that there is not currently a clearly articulated, multi-year strategic plan in place for alumni engagement at Southeastern Louisiana University.
- An annual operating plan exists for the SLUAO but there has not been a single unifying strategic document that integrates their work with Development and Communications and articulates a vision for alumni engagement across the University.
- Annual reports of activity are produced each year that summarize all of the initiatives of the SLUAO.
- There is a perception from interviewees that due to the lack of strategy in the SLUAO, there is a great deal of reactive decision making and repeated annual “traditional” events. These result in heavy workloads, last minute scrambling to complete assignments, and a lack of appropriate follow-up after events.

OBSERVATIONS

STAFFING AND BUDGET

- Using the total headcount of 3.5 FTEs, Southeastern Louisiana University's Alumni Office is staffed similarly compared to other institutions in Louisiana.
- However, SLUAO is understaffed and underfunded relative to mid and large size public institutions across the United States.
- Staffing levels for the SLUAO have decreased over the past 10 years due to budget cuts across the University. In 2007, there were 5.5 FTEs in the Alumni Office. In 2008, the headcount dropped to 4.5 FTEs. In 2009, the responsibilities of database management and therefore the position was shifted to Advancement Services and the Alumni Office remains at 3.5 FTEs today.

OBSERVATIONS

STAFFING AND BUDGET

- The total SLUAO reported staff (3.5) compared to the total alumni population (62,420) yields a ratio of 17,834 alumni for every SLUAO FTE. This ratio is above the average for institutions in the Louisiana cohort but below the average for institutions included in the mid and large size public university cohorts nationally. *(See chart on following page.)*
- SLUAO expenditures (\$357,481) compared to the total alumni population (62,420) produces an investment of \$5.73 per alumnus. This is below the average for available data from other cohorts. *(See chart on following page.)*

INSTITUTIONAL COMPARISONS: INVESTMENT PER ALUMNUS (CURRENT)

	SLU	Louisiana Cohort	Mid-Size Publics	Large Publics
Mailable Alumni Count	62,420	65,500	178,759	382,585
Alumni Relations Staff	3.5	3.1	17.8	43.7
Alumni Relations Expenditures	\$357,481	NA	\$2,599,200	\$8,963,967
Alumni : Staff Ratio	17,834	21,129	10,043	8,755
Dollar Investment per Alumnus	\$5.73	NA	\$14.54	\$23.43

Louisiana Cohort: Louisiana Tech University, McNeese State University, Nicholls State University, Northwestern State University, University of Louisiana at Monroe, and University of New Orleans

Mid-Size Publics: Ball State University, Miami University - Ohio, Oregon State University, Temple University, University of Delaware, University of Central Florida, and University of Massachusetts - Amherst

Large Publics: Arizona State, Ohio State, Penn State, Texas A&M, University of California at Berkeley, University of California at Los Angeles, University of Florida, University of Indiana, University of Michigan, University of Virginia, University of Washington, University of Wisconsin

OBSERVATIONS

STAFFING AND BUDGET

- Although the SLUAO reported a staff count of 3.5, there are actually fewer FTEs fully dedicated to alumni engagement activity.
- The Alumni Director, Kathy Pittman, has a dual role as the Campus Events Coordinator. This role takes at least half of her time away from alumni-related work.
- The Alumni Coordinator, Larry Hymel, is a half-time position focused exclusively on Athletics alumni engagement. He is highly effective in the role but his work has little impact on broader alumni engagement.
- Removing the above from the 3.5 head count (.5 from Kathy Pittman and .5 from Larry Hymel) the SLUAO staff is really only 2.5 FTEs. This has a major impact on the ratio of alumni per staff as compared to all other institutions including similar universities in Louisiana. *(See adjusted chart on following page.)*

INSTITUTIONAL COMPARISONS: INVESTMENT PER ALUMNUS (CURRENT – ADJUSTED)

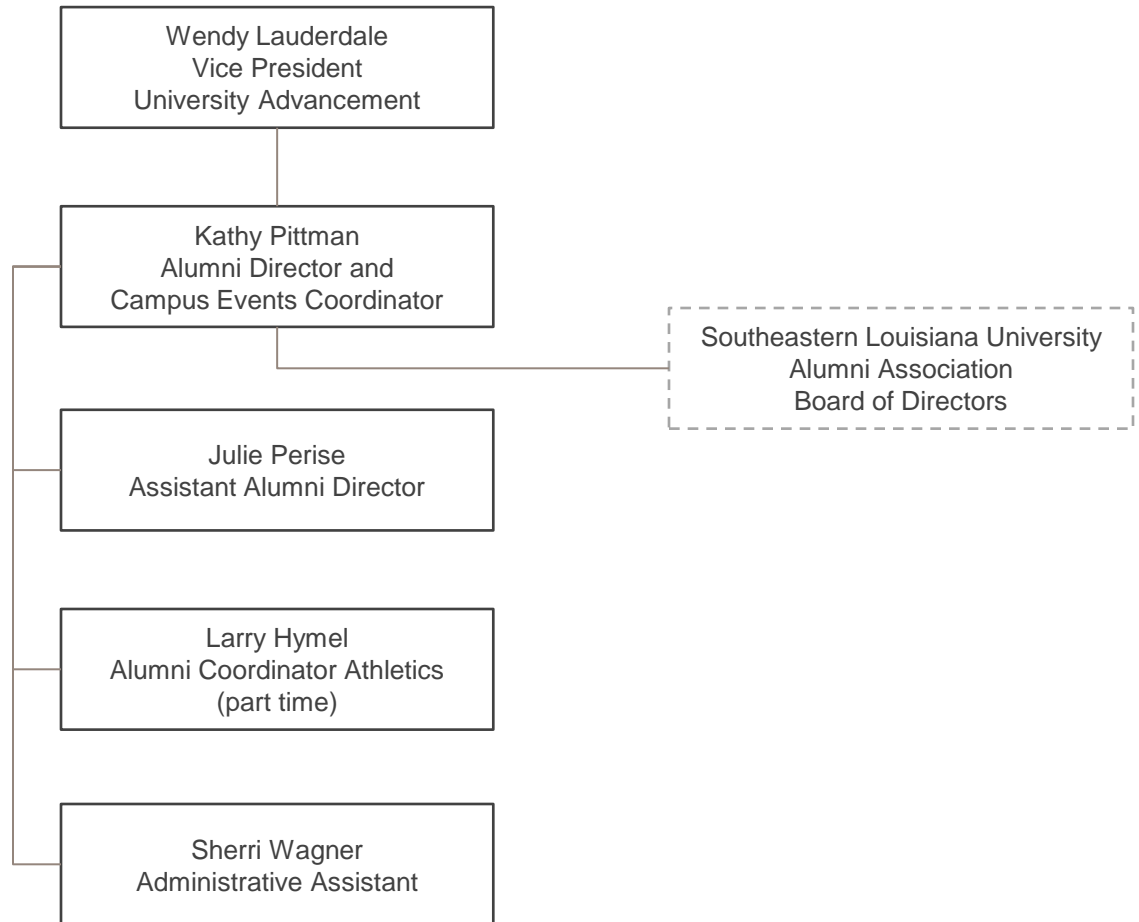
	SLU	Louisiana Cohort	Mid-Size Publics	Large Publics
Mailable Alumni Count	62,420	65,500	178,759	382,585
Alumni Relations Staff	2.5	3.1	17.8	43.7
Alumni Relations Expenditures	\$357,481	NA	\$2,599,200	\$8,963,967
Alumni : Staff Ratio	24,968	21,129	10,043	8,755
Dollar Investment per Alumnus	\$5.73	NA	\$14.54	\$23.43

Louisiana Cohort: Louisiana Tech University, McNeese State University, Nicholls State University, Northwestern State University, University of Louisiana at Monroe, and University of New Orleans

Mid-Size Publics: Ball State University, Miami University - Ohio, Oregon State University, Temple University, University of Delaware, University of Central Florida, and University of Massachusetts - Amherst

Large Publics: Arizona State, Ohio State, Penn State, Texas A&M, University of California at Berkeley, University of California at Los Angeles, University of Florida, University of Indiana, University of Michigan, University of Virginia, University of Washington, University of Wisconsin

OBSERVATIONS – ORGANIZATIONAL STRUCTURE (CURRENT)

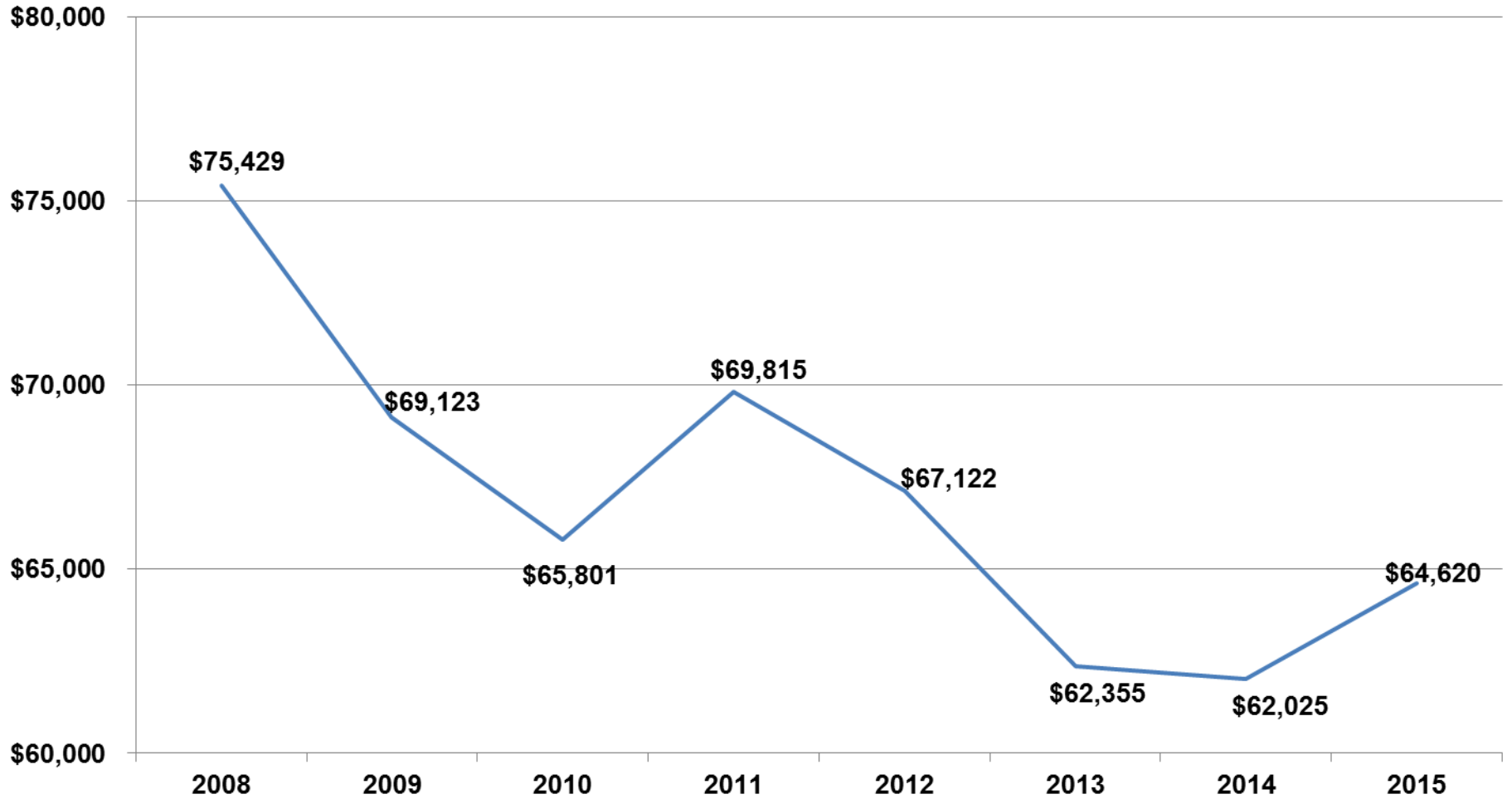


OBSERVATIONS

MEMBERSHIP

- The current Alumni Association total paid membership is at 1,948 alumni (3.1% of the alumni population). This figure includes 275 life members and 1,673 annual members in FY15.
- Total Alumni Association membership is reported as 4,189 alumni (6.7% of the alumni population). This higher figure includes 2,241 free memberships to recent graduates and Honorary Lifetime members.
- The annual membership dues level is currently at \$30 per individual alumnus.
- The lifetime membership dues level is currently at \$750 per individual alumnus.
- Based on audited financial statements, over the past eight years the gross annual revenue for dues membership has decreased from \$75,429 in 2008 to \$64,620 in 2015. *(See chart on following page.)*
- The average gross annual revenue between 2008 and 2015 has been \$67,036.

OBSERVATIONS – GROSS MEMBERSHIP REVENUE (FROM AUDITED FINANCIAL STATEMENTS)



OBSERVATIONS

BOARD

- The SLUAA Board of Directors is comprised of 16 members; 4 officers (President, President-Elect, Secretary, and Treasurer), 10 Board members, and 2 ex-officio Past Presidents.
- It was reported to GG+A by interviewees that the SLUAA Board of Directors serves to provide guidance to the staff, big picture thinking, and advice on engagement strategy.

OBSERVATIONS

PROGRAMMING

- Interviewees described the SLUAO programming as very Hammond-centric, targeted towards an older audience, and mostly focused on events around Athletics.

QUOTE: *"The Alumni Association is basically a local – Hammond – organization. Folksy, grassroots, event heavy, little use of technology and modern communications, and an over-emphasis on Athletics."*

- Homecoming was pointed to consistently as a signature event of the SLUAO. This event includes a week of activities for student competitions, a bonfire, tailgate, parade, a home football game, and a Homecoming Court. Student interviewees indicated that this is a highlight of the fall semester.
- Other major events that occur each year include: Champagne Bingo (Athletics fundraiser), Rock 'N Roar Fest (Admissions event), home football game tailgates (Athletics), and the Coaches Caravan (Athletics).
- Most of these events include some alumni attendees but many of the events benefit other areas of the University outside of Advancement.

OBSERVATIONS

PROGRAMMING

- GG+A believes that student and young alumni engagement are two of the most important aspects of a high functioning and modern Alumni Relations program.
- Together, these efforts will change the future of alumni engagement at Southeastern Louisiana University.

***“The best time to plant a tree was 20 years ago.
The second best time is now.”***

– Chinese Proverb

- All first year students take a class called “Southeastern 101”. This is a general introduction to SLU and life as a student. Only three sections (out of 40 total sections) are provided information on the SLUAA, life after Southeastern, and the SLU alumni network.
- The Alumni Board President speaks at Commencement and has the opportunity to “swear in” new graduates with the SLU alumni pledge. GG+A endorses this as a best practice.

OBSERVATIONS

PROGRAMMING

- GG+A observed that there are currently 11 regional chapters, 7 Fraternity and Sorority groups, and 13 affinity groups that are identified on the SLUAA website.
- GG+A learned, however, that there are only a handful of these chapters/groups that are active and fully functioning. Most others are in a dormant state due to lack of staff focus and well-trained volunteer leaders.
- The perception from many interviewees is that nearly all activity takes place in Hammond and other parts of the state are ignored.

QUOTE: *"There hasn't been a single alumni event in St. Tammany Parish in over 20 years."*

OBSERVATIONS

PROGRAMMING

- GG+A observed that professional or industry-based alumni programming does not currently exist at Southeastern Louisiana University.
- GG+A believes that there are engagement opportunities around convening alumni from various industry sectors such as finance, real estate, education, nursing, health care, energy, technology, entrepreneurship, and others as appropriate to the SLU alumni population.

OBSERVATIONS

COMMUNICATIONS

- The Southeastern Magazine is produced twice a year and sent to all dues payers, donors, and prospective donors.
- The Alumni News is also produced twice a year and sent to all Alumni Association members.
- The “By-Lion” electronic newsletter is sent weekly to Foundation and Alumni Association Board members.
- The SLUAA does have a presence on the big three social media sites: Facebook, LinkedIn, and Twitter. Most of this activity is managed by a part-time independent contractor on behalf of the Alumni Office.

OBSERVATIONS

METRICS

- Other than counting overall event attendees, GG+A discovered that there are no other set engagement goals and metrics used to assess the performance of the SLUAO program.
- All event attendees and volunteers are not tracked and recorded in the central database.
- Currently, the SLUAO does not regularly report on any alumni engagement data to key internal or external stakeholders.

OBSERVATIONS

METRICS

- SLU was unable to provide the total number of unique alumni event attendees and the total number of unique alumni volunteers. The total number of unique alumni donors was the only data point available for this review.

	FY2015	
Alumni Group	Number of alumni	% of engaged alumni
Alumni Donors	2,633	4.2%
Alumni Attendees	N/A*	Unable to calculate from database
Alumni Volunteers	N/A*	Not coded in database
Total Engaged Alumni	N/A*	Unable to calculate
All Alumni	62,420	

* Data not provided in RFM response.



RECOMMENDATIONS

RECOMMENDATIONS

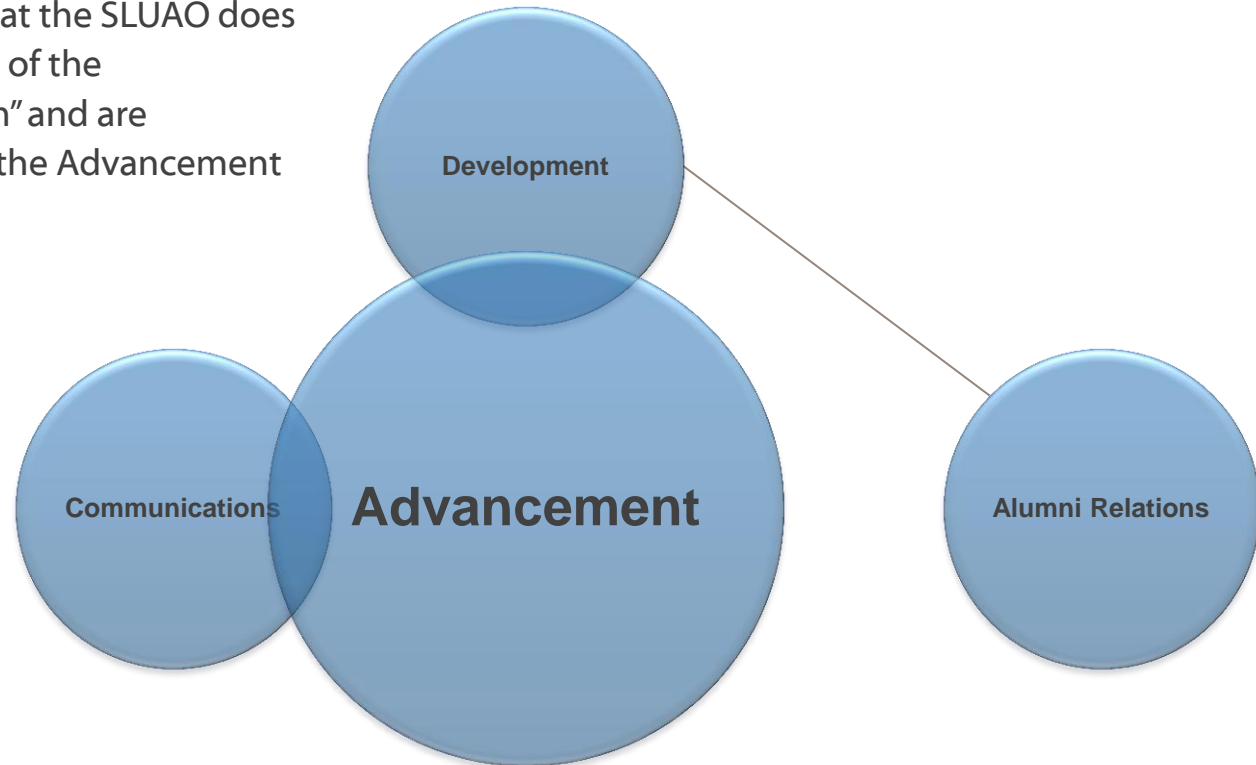
GENERAL

- GG+A strongly recommends that a disciplined programmatic focus is needed. Do a few programs really well with the resources currently available and expand programming as increased resources are allocated. The section on recommendations for the strategic plan includes the suggested approach.

- GG+A recommends that the SLUAO adopt an integrated Advancement model mindset and embrace the notion that their role is in full alignment with the University and is two fold:
 - 1) Broaden and deepen alumni engagement, and
 - 2) Connect engagement activity to the overall advancement program.

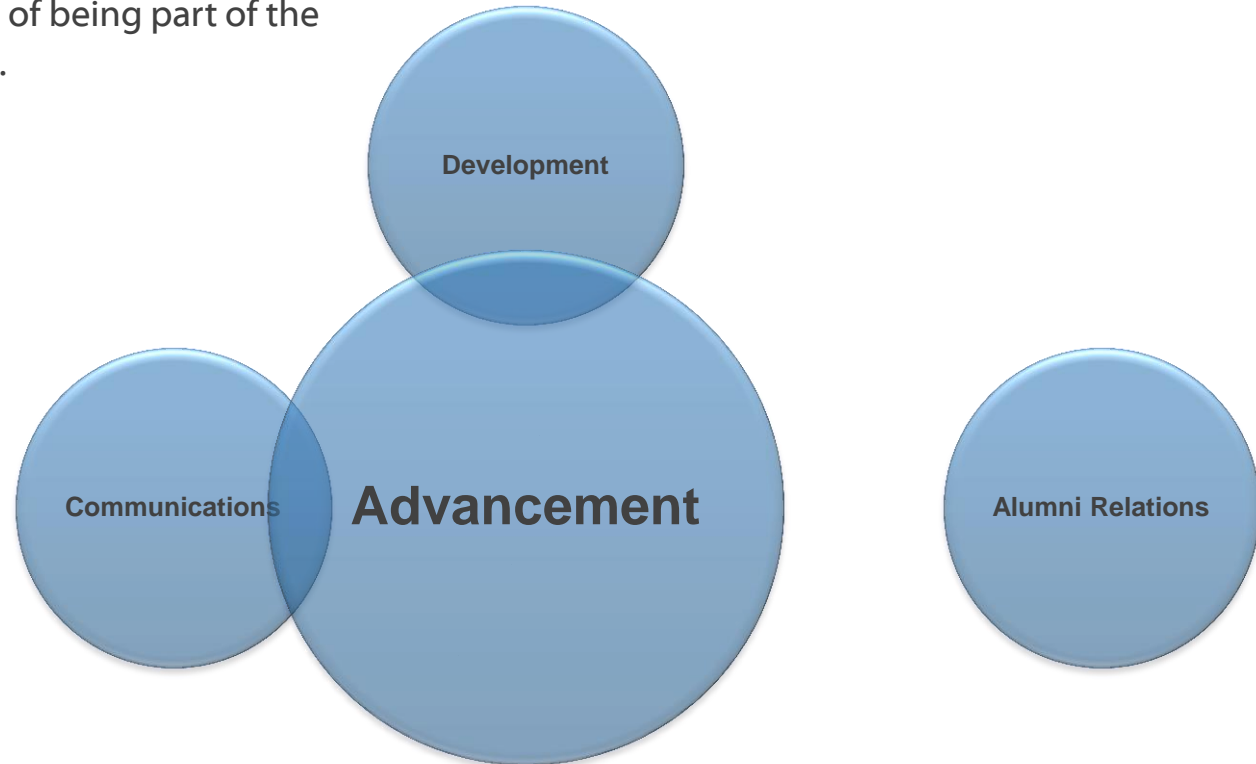
RECOMMENDATIONS – GENERAL

- As described previously in this report, a perception exists that the SLUAO does not function as part of the “Advancement team” and are disconnected from the Advancement operation.



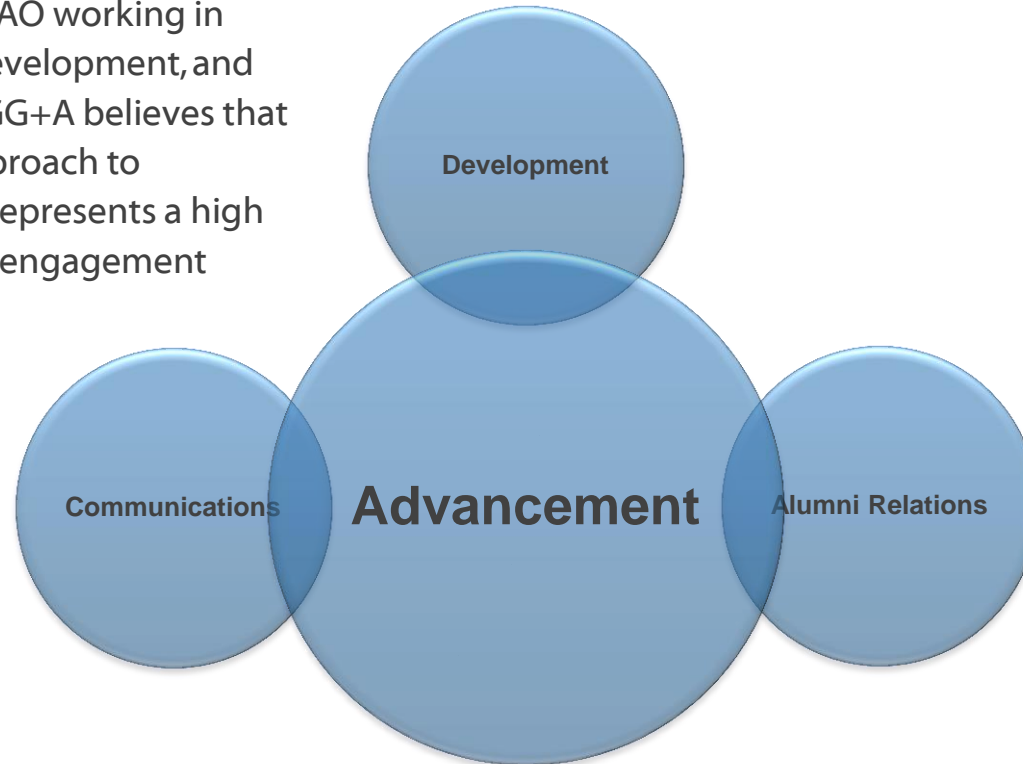
RECOMMENDATIONS – GENERAL

- GG+A recommends that the SLUAO embrace the notion of being part of the Advancement team.



RECOMMENDATIONS – GENERAL

- A true integrated Advancement model will include the SLUAO working in partnership with Development, and Communications. GG+A believes that this is a modern approach to Advancement and represents a high functioning alumni engagement program.



RECOMMENDATIONS

STRATEGIC PLAN

- GG+A recommends that a strategic plan for the Southeastern Louisiana University Alumni Office be initiated by staff leadership, developed collaboratively across all internal stakeholders, guided by Advancement goals, and include input from the SLUAA Board of Directors. We suggest the strategic plan include a 2016-2017 operating plan, a three-year staffing and budget growth model, and measurable engagement goals.
- GG+A recommends that the strategic plan look ahead to FY17, FY18, and FY19 and set the course for alumni outreach and engagement – across the University – as SLU heads into a campaign.
- The strategic plan should also clearly articulate the areas of focus for alumni engagement and emphasize a “less is more” approach to programming. Conduct fewer events that are higher in quality with a targeted audience, and include a clear plan for follow-up with alumni attendees.
- Current resources should be allocated to accomplish the highest priority items. Staff workloads should be balanced and focused on the highest priority and most impactful programs.

RECOMMENDATIONS

STRATEGIC PLAN

- As part of the strategic planning exercise, GG+A recommends that the SLUAO staff conduct a detailed inventory of all programming and make recommendations on which initiatives should be stopped, put on hold, or prioritized and continued.
- GG+A recommends that the priority areas include:
 - 1) Students;
 - 2) Young Alumni;
 - 3) Regional Chapters; and
 - 4) Professional/Industry Affinity Groups.
- GG+A recommends that the creation of the Alumni strategic plan be developed with division colleagues. Closer collaboration across the division is needed.
- An alumni attitudinal study should be conducted to solicit feedback on current programming and gather input on the types of initiatives that alumni are looking for from the SLUAO.

RECOMMENDATIONS

STAFFING AND BUDGET

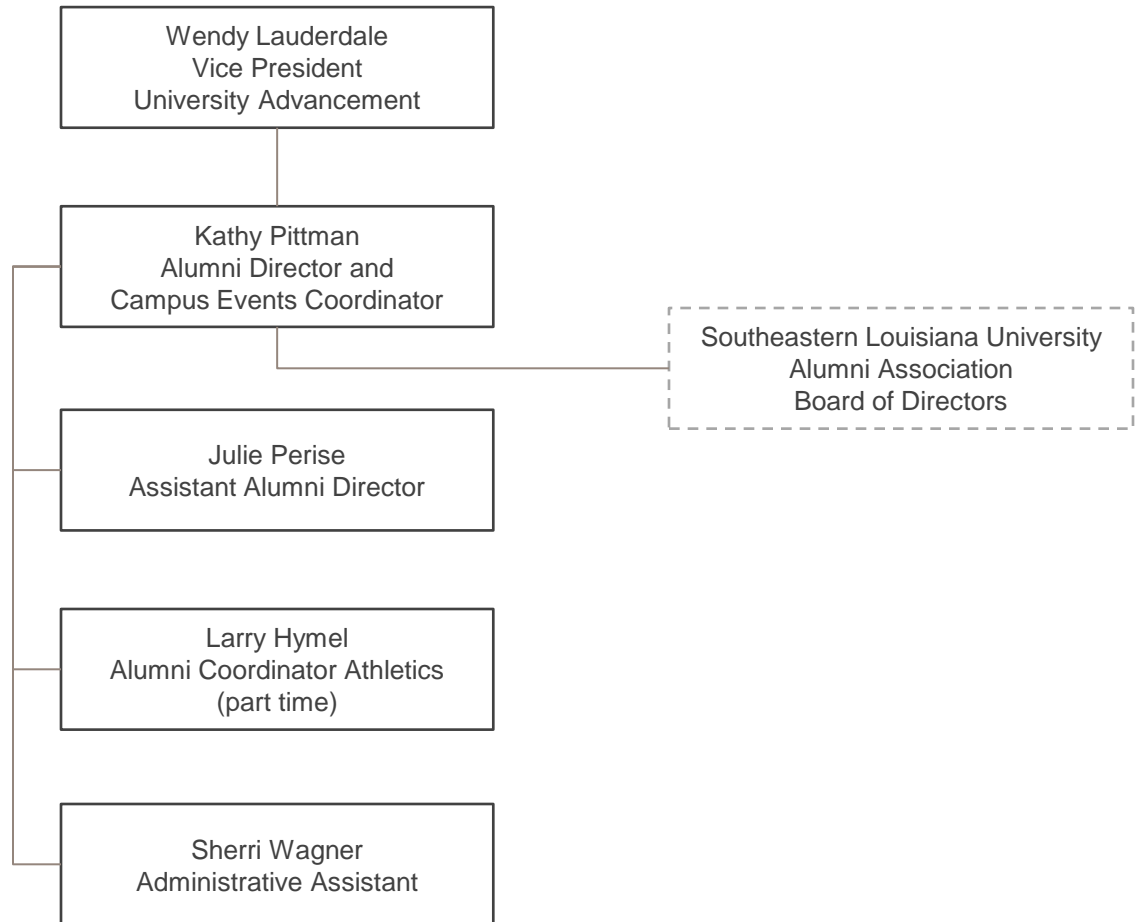
- GG+A recommends that the SLUAO staffing level be increased by one position when resources become available. This new position should have a dedicated focus on student outreach, young alumni engagement, and social media communications.
- All SLUAO staff members should attend some form of Development training in order to function more effectively in an integrated Advancement model.

RECOMMENDATIONS

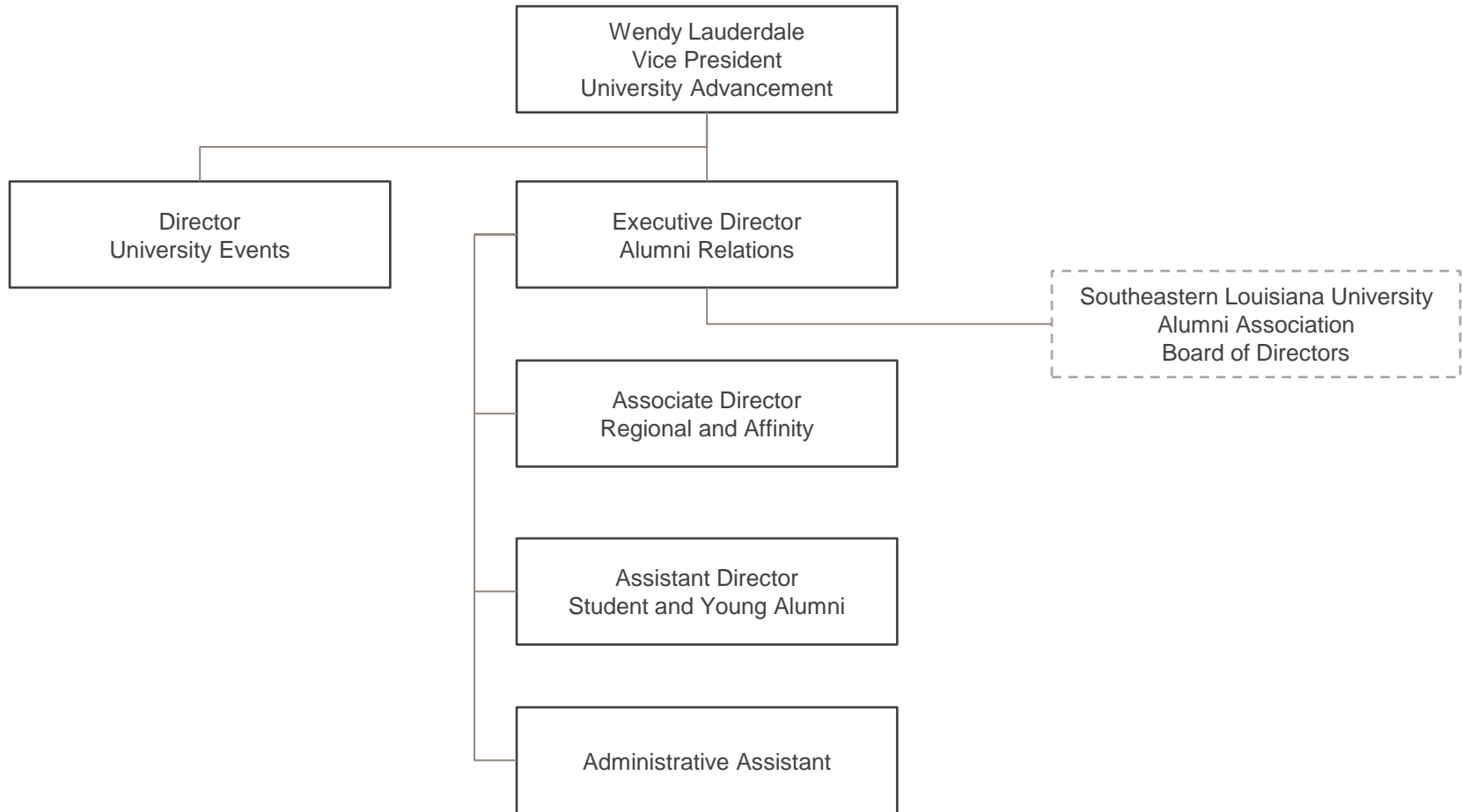
ORGANIZATIONAL STRUCTURE

- The organizational structure for the SLUAO should evolve, become more focused, and incorporate the programmatic recommendations in this report.
- Alumni Relations leadership and University Events leadership should be split into two separate positions both reporting into the Vice President for University Advancement.
- Recruit an Alumni Relations professional to lead the SLUAO who has a familiarity of SLU, understands industry best practices, and can function in an integrated Advancement model. This position should have an Executive Director title to reflect industry standards.
- All events should be evaluated and anything not focused on alumni engagement should be moved to the new University Events position.
- The Alumni Coordinator dedicated to Athletics should be relocated and report directly into Athletics as part of the Lions Athletic Association.
- The pages that follow outline our recommended step-by-step evolution of the staffing structure.

OBSERVATIONS – ORGANIZATIONAL STRUCTURE (CURRENT)



OBSERVATIONS – ORGANIZATIONAL STRUCTURE (FUTURE)



RECOMMENDATIONS

MEMBERSHIP

- GG+A recommends that Southeastern Louisiana University move to a new model where all alumni are members of the Alumni Association – “Freemium” – and offer a “Premium” membership level where alumni receive increased benefits.
- Premium benefits could include: recognition as a donor, access to special member-only events, VIP access to tickets for arts or athletics, hard copy of the magazine twice a year, and other perks to be determined. This option should have perceived value to alumni and demonstrate an “insiders” connection to SLU.
- GG+A recommends that all Premium members be considered donors and that the membership fee be increased to a minimum of \$100.
- GG+A also recommends that all donors to SLU affiliates, at the base level of \$100, be considered Premium members of the Alumni Association.

RECOMMENDATIONS

MEMBERSHIP

- The “Freemium” model also presents a good will marketing opportunity for SLU as it heads into a campaign. Messaging around the fact that, “all SLU alumni are now considered official members of the Alumni Association,” could be extremely powerful in re-engaging many alumni.
- GG+A believes that if the entire program (“Freemium and Premium”) is marketed properly, this may have a benefit to increased engagement and giving.
- Finally, GG+A recommends that all graduating students be given a Premium membership to the Alumni Association for one year upon their graduation.

RECOMMENDATIONS

BOARD

- GG+A recommends that the Board of Directors continue to function in a strategic advisory capacity to the SLUAO staff, collaborates closely with the Foundation Board, and work in alignment with the overall Advancement strategy.
- Volunteer identification, recruitment, training, and recognition should be priorities for the Board of Directors working in collaboration with SLUAO staff.
- The Board of Directors committee structure should align with the strategic plan and priority program areas to drive work between meetings.
- The composition of the SLUAA Board of Directors should strive to be demographically representative of the broader alumni population.

RECOMMENDATIONS

BOARD

- A designee from the SLUAA Board should serve on the Foundation Board and vice versa. The same model should be considered for the Lions Athletic Association Board. Increased communication and coordination should be the goal of these appointments.
- The Vice President for University Advancement and the University President should have regular interaction with the SLUAA Board of Directors and should attend quarterly meetings.

RECOMMENDATIONS

PROGRAMMING

- Comprehensive Student and Young Alumni engagement programming should be launched immediately and dedicated resources applied to this effort. Program examples include:
 - Sendoff events for incoming students in top eight geographic areas
 - Welcome event for first year students
 - Programming throughout student experience that connects students with alumni (Homecoming, networking events, mentoring program, etc.)
 - Programming targeted to students in their final (senior) year (Senior Class Gift, Senior Week, Commencement event, etc.)
 - Welcome events for young alumni living in (or relocating to) the top eight geographic areas

- All sections of the Southeastern 101 class that is provided to all first year students should include an introduction to the SLUAA and general information about alumni. This is a golden opportunity to plant the seeds of alumni loyalty for all future alumni.

- The SGA President should serve on the SLUAA Board of Directors.

RECOMMENDATIONS

PROGRAMMING

- GG+A recommends the creation of a specific outreach plan for young alumni leveraging concentration areas of alumni in key cities, focused on career/professional programming, and around industry sector affinity groups.
- A Young Alumni Council (YAC) should be created from representatives of the past ten years of graduating classes. This group should be a “junior” board to the SLUAA Board of Directors and serve as an advisory group to staff regarding young alumni programming.
- The YAC President should serve on the SLUAA Board of Directors.

RECOMMENDATIONS

PROGRAMMING

- GG+A recommends that there be a dedicated staff member to manage, (re)activate, and sustain the regional chapters in the largest alumni concentration areas. This staff position should be focused on volunteer management driving programming around the four strategic plan priority areas.
- For regional chapters, the SLUAO should focus on the eight geographic areas with the highest concentration of alumni and donors. A clearly defined tiered approach with corresponding levels of attention, support, and activity in each of these tiers should be developed.
 - Tier 1 – the two largest chapters in Louisiana (St. Tammany Parish and Tangipahoa Parish).
 - Tier 2 – the next four largest chapters in Louisiana (Livingston, New Orleans, Metairie, and Baton Rouge)
 - Tier 3 – the top two U.S. cities/regions outside of Louisiana (Houston and Dallas)
- GG+A recommends that the SLUAO establish an annual on-campus volunteer training event for regional chapter and affinity group leaders. The development and execution of this type of training program could provide a role for the Board of Directors.

RECOMMENDATIONS

PROGRAMMING

- GG+A also recommends that University Advancement, and the SLUAO in particular, establish a close partnership with University Admissions to leverage regional chapter (and young alumni) activity.
- Goals of this partnership would be to organize alumni to assist with recruiting prospective students, increasing enrollment, producing matriculation events in key/targeted cities, and mentoring current students to increase retention. All of these are of critical importance to enrollment management at SLU. Having alumni play a role in bolstering these efforts would be a significant outcome of this initiative.
- Finally, GG+A recommends that regional programs partner with University Admissions and Student Affairs to produce sendoff events for students, families, and alumni in the ten key regions.

RECOMMENDATIONS

PROGRAMMING

- Once the staffing structure is in place, GG+A recommends that the SLUAO launch pilot engagement initiatives (communications, volunteer outreach, events, etc) around identified industry sector affinity groups.
- The development of these pilot engagement initiatives should be done in close partnership with staff in the various colleges and with career services.
- Career Services leadership indicated that they are keenly interested in collaborating and supporting these types of initiatives.
- The Deans also indicated an interest in partnering around affinity-based activities.
- Potential industry sectors to explore should include: finance, real estate, education, nursing, health care, energy, technology, entrepreneurship. Others sectors should be considered as well and aligned with University and campaign priorities.

RECOMMENDATIONS

COMMUNICATIONS

- An enhanced social media presence is needed for alumni. Without additional staffing this will be difficult to accomplish.
- The “By-Lion” electronic newsletter that is sent weekly to Foundation and Alumni Association Board members should be redesigned and sent to a broader audience of alumni.

RECOMMENDATIONS

METRICS

- GG+A recommends that an engagement scorecard reporting basic engagement metrics be developed and incorporated into the regular reporting and goal setting of the SLUAO. This is a best practice in the Alumni Relations industry.

- Basic engagement metrics should be developed around the following model:
 - An “engaged” alumnus is someone who has done at least one of the following:
 - **Participated:** attended an event, webinar, etc.
 - **Volunteered:** gave of their time on behalf of Southeastern Louisiana University
 - **Donated:** made a financial contribution (at any level) to Southeastern Louisiana University

$$\frac{(\text{Participants} + \text{Volunteers} + \text{Donors}) - \text{Duplicates}}{\text{Total Mailable Alumni Population}} = \text{Alumni Engagement Score (\%)}$$

RECOMMENDATIONS: METRICS

- GG+A recommends that Southeastern Louisiana University begin tracking and reporting on the Alumni Engagement Score immediately using FY16 data.
- GG+A recommends that data be reported in a succinct “engagement scorecard” using basic engagement metrics and that these metrics become part of annual and campaign goals. A sample of a scorecard is included below.

	FY2013		FY2014		FY2015	
Alumni Group	Number of alumni	% of engaged alumni	Number of alumni	% of engaged alumni	Number of alumni	% of engaged alumni
Alumni Donors	9,237	7.1%	9,339	7.2%	8,408	6.3%
Alumni Attendees	4,267	3.3%	4,369	3.4%	4,277	3.2%
Alumni Volunteers	14	0.0%	34	0.0%	44	0.0%
Total Engaged Alumni	12,474	9.6%	12,612	9.7%	11,725	8.7%
All Alumni	130,000		130,000		134,205	

RECOMMENDATIONS

METRICS

- Share aggregated engagement score summaries publicly with all of Advancement, the Board of Directors, other volunteer leaders, University leadership, and with all alumni.
- GG+A recommends publicly reporting engagement metrics for the following segments of alumni: all alumni, by region, by class year or decade, by college, and by affinity group.
- All alumni relations activity in the colleges should be tracked and included in this engagement score calculation.
- GG+A also recommends that alumni engagement goals be an explicit goal in the upcoming campaign.

RECOMMENDATIONS

METRICS

- GG+A also recommends the Net Promoter Score (NPS) be used to measure the qualitative success of all SLUAO events.
- Complete details on the Net Promoter Score can be found in the GG+A Quarterly Review. (See *Appendix C.*)
- Details on the Net Promoter Score can also be viewed via the following link to a GG+A webinar on the same topic:
<http://www.grenzebachglier.com/calendar/2013/05/net-promoter-system-webinar.html>





NEXT STEPS

NEXT STEPS

- GG+A believes that the following recommendations are the most critical steps for the Southeastern Louisiana Alumni Association:
 - 1) Split Alumni Relations and University Events into separate positions.
 - 2) Scope the position responsibility, begin the search for, and hire an Executive Director for Alumni Relations.
 - 3) Begin the strategic planning process ASAP.
 - 4) Conduct an alumni attitudinal study to inform the strategic planning process.
 - 5) Use the strategic planning process to help eliminate internal silos and increase collaboration across Advancement.
 - 6) Use the strategic planning process to also evaluate all programming and determine what initiatives to start, stop, and continue.
 - 7) Strategic priorities should include: Student Outreach, Young Alumni Engagement, focus on sustaining the top eight Regional Chapters, and launching Professional Affinity Groups.



ACKNOWLEDGEMENTS

ACKNOWLEDGEMENTS

- GG+A acknowledges and appreciates the extensive work by the Alumni Relations team that went into completing our Request for Materials (RFM) in preparation for this review. Data and materials that were provided were detailed and comprehensive.
- GG+A also thanks the many staff and volunteer leadership throughout the University for the time and attention they gave to this review.



**APPENDIX A:
LIST OF INTERVIEWEES**



LIST OF INTERVIEWEES

- Tony P. Ardillo, Jr., *Alumni Past President*
- Annabelle Armstrong, *Alumni '51*
- Jay Artigues, *Athletics Director*
- Marcia and Cameron Barr, *Athletics Volunteer/Foundation Board/Major Donor*
- Chris Bentley, *Alumni Volunteer & Athletics Staff*
- Haydn Berey, *Alumni Past President*
- Rita Bertolino, *Alumni Past President*
- Barry Brown, *Foundation Executive Committee*
- Ann Carruth, *Dean*
- Jerry Correjolle, *Alumni Past President*

LIST OF INTERVIEWEES

- Andre and Kelly Coudrain, *Alumni Volunteer/Donor/Former Systems Board, Alumni '81*
- Erin Cowser, *Alumni & Government Affairs*
- Sam Domiano, *Alumni and VP Finance & Administration*
- Daryl Ferrara, *Alumni Volunteer/Past President of Association*
- Karen Fontenot, *Dean*
- Mayson Foster, *President Elect of Association*
- Ben Foster, *Alumni '93*
- Marcia Galatas, *Foundation Executive Committee*
- Brian Gohres, *Alumni, '03*
- Lynn Horgan, *Development Staff*



LIST OF INTERVIEWEES

- Larry Hymel, *Alumni Staff*
- Ken Kenelly, *Alumni '75*
- William Lambert, *Alumni Past President*
- Wendy Lauderdale, *Vice President for University Advancement*
- Joe Luquet, *Foundation Executive Committee*
- Dan McCarthy, *Dean*
- Jim McHodgkins, *Assistant VP for Student Affairs*
- Josie Mercante, *Alumni Volunteer/President*
- Drs. Randy and Barbara Moffet, *Retired University and System President & Foundation Board Member, Retired Faculty*
- Donna Naquin, *UA Staff/Former Alumni Assistant*



LIST OF INTERVIEWEES

- Marcus Naquin, *Alumni/Foundation Board Member*
- Stacey Neal, *Alumni Executive Committee Member*
- Cynthia Nesser, *Foundation Executive Committee*
- Julie Perise, *Assistant Alumni Director*
- Scott Perrilloux, *Athletics Volunteer, Alumni '84*
- Toni Phillips, *Dean*
- Heather Pitarro, *Alumni '00, '01*
- Kathy Pittman, *Alumni Director*
- Alexis Quackenbush, *SGA Leadership*
- Guy Recotta, *Alumni Past President*
- Ken Ridgedell, *Career Services*

LIST OF INTERVIEWEES

- Mike Rivault, *Admissions and Communication/Marketing*
- Katherine Rose, *Senior Director of Development, Advancement Services*
- Gary Sandifer, *Alumni Past President*
- Mike Sharp, *Foundation Executive Committee*
- Josh Taylor, *Alumni '05/'06*
- Chuck Toney, *Foundation Executive Committee*
- Randy Vicknair, *Alumni Executive Committee Member*
- Sherri Wagner, *Alumni Staff*
- Kim Walker, *Alumni Executive Committee Member*
- Kelly Wells, *Alumni '91,'99*
- Pat Williams, *Alumni Past President*



**APPENDIX B:
GG+A PROJECT TEAM**

APPENDIX B:
GG+A
PROJECT TEAM

- Chris Marshall, *Senior Vice President*
- Megan C. Williamson, *Consulting Associate*



**APPENDIX C:
GG+A QUARTERLY REVIEW**