



Indiana University Alumni Association

# **Organizational Plan 2021–2025**

Adopted on November 21, 2020



INDIANA UNIVERSITY  
**ALUMNI ASSOCIATION**

Dear Alumni, Partners, and Friends —

We are pleased to present the 2021–2025 organizational plan for the Indiana University Alumni Association. Built on the foundation of our 2015–2020 plan and our 166 years of history, it reflects our values and sets a path toward achieving the vision that all who love IU are advancing one another and the university.

We strive to be servant leaders in alumni engagement and institutional advancement at Indiana University. To that end, we redouble our professional pledge to develop, serve, and support our stakeholders and partners.

As we undertake our mission of activating and supporting the global alumni network, we declare three priorities: cultivate belonging, deepen alumni loyalty, and strengthen alumni relations across IU. Each of these priorities is supported by strategies that will guide our efforts in the years to come.

This plan is the culmination of 16 months of work by the IUAA Board of Managers, members of our staff, and scores of alumni volunteers. We leaned in and listened eloquently to create a document reflective of our highest aspirations. We also adapted the plan in response to the effects of a global pandemic and calls for racial justice.

We proudly serve more than 725,000 alumni—and more than 69,000 members—and our strong legacy continues as we embark on IU’s third century.

J T. Forbes  
Chief Executive Officer

Tricia Riveire Stumpf  
Senior Executive Director

Vi Simpson  
Chair, 2020–2021

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## Values

As we pursue our mission, vision, and priorities, a core set of values guides our approach:

- **Collaboration:** We work together to achieve common goals.
- **Commitment:** We serve each other, our alumni, and the university with professionalism and integrity.
- **Inclusion:** We work to create an inclusive culture that is committed to diversity, belonging, and equity.
- **Pride:** We share and celebrate the best of the past, present, and future of IU.

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## Vision

All who love IU are advancing one another and Indiana University.

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## Mission

The Indiana University Alumni Association activates and supports the global alumni network—encouraging alumni to grow a lifelong connection with Indiana University and inspiring their ongoing generosity toward each other and the university.

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## Priorities

- **Cultivate belonging:** To ensure a welcoming, equitable, diverse, and inclusive community, we will challenge discrimination and our inherent biases.
- **Deepen alumni loyalty:** To build the alumni community, we will learn how alumni identify with IU and each other, and then offer relevant experiences that encourage stronger commitment.
- **Strengthen alumni relations across IU:** We will collaborate with IU stakeholders and support efforts to engage more deeply with their alumni audiences.

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## Strategic Outcome

Our overall strategic outcome is to increase alumni loyalty to Indiana University. As we pursue this goal, we will regularly measure our progress against a range of metrics.

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## Strategies

### Cultivate belonging

To ensure a welcoming, equitable, diverse, and inclusive community, we will challenge discrimination and our inherent biases.

- **Strategy 1:** Strengthen the individual and collective cultural competence of our staff and volunteers.
- **Strategy 2:** Identify and remedy perceived or actual systemic discrimination or acts of oppression and facilitate reconciliation, recovery, and repair.
- **Strategy 3:** Recognize the diverse identities, perspectives, and experiences of our alumni and invest in efforts to represent all of them, especially those who have been historically underrepresented.

### Deepen alumni loyalty

To build the alumni community, we will learn how alumni identify with IU and each other, and then offer relevant experiences that encourage stronger commitment.

- **Strategy 1:** Understand how alumni identify with IU and how they are most likely to engage with IU and each other.
- **Strategy 2:** Position the IUAA as a brand and content producer worthy of alumni trust.
- **Strategy 3:** Encourage participation by delivering all members consistent, accessible, and culturally relevant online and on-site experiences.
- **Strategy 4:** Recognize and reward participation in and commitment to the community.

### Strengthen alumni relations across IU

We will collaborate with IU stakeholders and support efforts to engage more deeply with their alumni audiences.

- **Strategy 1:** Empower our partners to serve their alumni audiences by investing in scalable, enterprise-wide solutions.
- **Strategy 2:** Work with partners to determine university-wide alumni-relations priorities and lead action on those items.
- **Strategy 3:** Grow volunteer capacity in key alumni markets to support IU priorities.
- **Strategy 4:** Develop a process to manage and measure alumni-engagement activity and performance.

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## Tracking Plan Progress

The Indiana University Alumni Association will track the progress of the plan quarterly, based on measurable outcomes. Metrics will be applied to the plan's strategies, with each having customized goal(s).

The IUAA Senior Management Team will encourage collaboration and accountability among staff by assigning strategy leaders and teams, beginning in winter 2020–2021. Strategy leaders and teams will lead efforts to finalize tactics—including assessing resource requirements and developing timelines—and execute on them.

Beginning in June 2021, staff will present an annual progress report to the Assessment Committee of the Board of Managers and at the annual meeting.

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## Measuring the Success of Alumni Engagement

Today, an alumni relations program is not only about the **breadth** of engagement via event participation or the number of alumni and friends we see in hotel ballrooms around the world. It is also measured by demonstrating the **depth** of engagement. The deeper connections we are developing with alumni and the contributions we are making to the development cycle and fundraising outcomes of the university are now equally important.

At Indiana University, we have seen correlations with our work and philanthropic giving. During the next five years, we will continue to develop our capacity to measure alumni engagement and its impact on advancing IU priorities.

Since 2015, we have developed capacity to measure our work. As a result, we are now poised to develop goals and measure key performance indicators. We have adopted the metrics outlined below to support alignment of our organizational plan goals, the needs of our alumni, and industry standards.

We will develop a comprehensive view of factors that measure the success of alumni relations enterprise-wide, such as:

- We will begin the work of applying the Council for Advancement and Support of Education (CASE) standards and metrics to develop a baseline of activity, and then set goals in the following categories:
  - Experiential
  - Philanthropic
  - Volunteer
  - Communications

- We will continue the best practice of using the Net Promoter Score (NPS) methodology to measure alumni loyalty annually. Outcomes are measured globally and by appropriate segments, including member and non-member, and alumni demographics.
- We will correlate these two metrics against each other to demonstrate the impact that engagement has on philanthropic support.

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## **Contributors**

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### **Task Force**

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