



2019

Engagement Team-Goals and Priorities-2019-2020

Illinois Wesleyan University

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ILLINOIS WESLEYAN ENGAGEMENT TEAM

Vision: With core values of excellence through education, communication, and community, the Office of Alumni Engagement develops programs and services that empower the Titan Community (alumni, students, parents, faculty, donors, and friends) to grow and strengthen relationships and build a legacy of service and investment in support of Illinois Wesleyan University.

Mission: The Office of Alumni Engagement in partnership with the Illinois Wesleyan University Alumni Association serves the Titan Community by creating meaningful opportunities for connection and philanthropy through purposeful experiences that increase engagement and participation which inspires loyalty to the University.

Overall Goals and Priorities

Improve overall service to internal and external partners by offering assistance throughout the engagement process and being proactive in how opportunities are managed. We will focus on 1) Experience; 2) Volunteerism; 3) Communication; and 4) Philanthropy in tracking engagement.

1. Set administrative and programmatic infrastructure to support inclusive alumni engagement through full cycle of interaction
 - a. Develop vision and mission with outline for alumni engagement model
 - b. Create process and procedure for alumni engagement model
 - c. Work with Advancement Operations to fully develop alumni engagement model for tracking and scoring alumni participation
 - d. Support on-campus partners in facilitation of alumni engagement
 - i. Meet with academic and administrative departments to outline partnership and alumni volunteer opportunities
 - ii. Create and manage ongoing programs to engage alumni
2. Partner with Alumni Association Board of Directors (AABD) to increase alumni involvement
 - a. Align AABD structure, goals, and priorities with University and Engagement Team (where applicable)
 - b. Utilize AABD to advance conversation and improved involvement of alumni in University activities (where appropriate)
 - c. Encourage AABD to connect with a broader audience of alumni through affinity group and committee programming; and, in general interactions
 - d. Restructure regional programming to empower alumni volunteers with a focus in Illinois
 - e. Use AABD to garner more alumni participation in Admissions Recruitment program
 - f. Involve AABD in various annual giving programs to help improve alumni participation and support for the University

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Overall Goals and Priorities (cont'd)

3. Develop strategies and tactics to meet and exceed \$3.1M unrestricted giving goal
 - a. Create segmentation of data beyond behaviors to include affinity/loyalty approach
 - b. Develop a pipeline of donors that follows pattern of Advancement Officers donor segmentation
 - c. Focus on Leadership Donor level giving to the University
 - d. Improve overall messaging and stewardship of gifts
4. Annual Giving
 - a. Track donor progress with entering donor status and baseline numbers
 - b. Focus on retention, reactivation and acquisition
 - c. Develop donor populations in addition to segments
 - d. Write solicitations that resonate with donors through affiliation, affinity and/or designation - no more boilerplate messages!
 - e. Regular status assessment to incorporate adjustment plans and A/B testing
 - f. Develop leadership donor strategy focused in Illinois (Chicago) based on capacity and giving history
5. Alumni Engagement
 - a. Work with Alumni Association Board of Directors to assure alignment with University
 - b. Review regional programming to focus more on Chicago region - develop programming in various areas including city and suburbs with dynamic content and speakers. Continue programming in other key regions based on wealth screening and intel from Advancement Officers
 - c. Empower Regional Alumni Chapters and other groups to autonomously sustain programming on a regular cadence; provide infrastructure to support activities
 - d. Ensure events are marketed and branded effectively from conception to execution
6. Engagement Communications
 - a. Create centralized and focused communications process for Advancement department
 - b. Develop and manage projects for messaging, branding, and effectiveness through various distribution channels
 - c. Be more targeted, intentional, and specific with messages and be sure to integrate various programs through all channels
 - d. Work with campus partners (academic and administrative) for inclusion in messages
 - e. Work with AABD and alumni volunteers to ensure alignment with University and departmental goals
 - f. Develop analytics to track and measure all communication strategies

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ANNUAL GIVING GOALS/WORK PLAN

1. Annual Giving: Incorporate strategies and tactics that helps to achieve the University's unrestricted goal of \$3.1M. Create targeted messaging to alumni, parents and friends based on the qualification of retention, reactivation, or acquisition. Be reactive throughout the fiscal year and adjust appeal frequency and message based on donor response.

Metric(s): Improve alumni participation to at least 20% (from 16%); with efforts to get back to 22%. Reactivate 10% of lapsed donors and create specific appeals to acquire new donors. Spend 90% of our time, dollars and effort working to retain donors.

Outcome: Send timely, concise and memorable correspondence and solicitations that resonate with donors based on both giving history and affinity. The primary focus is to increase dollars in the door; with an effort to acquire new donors and increase the total number of donors.

2. Fiscal Year/Calendar Year End: Utilize successful appeals from FY18 while incorporating fresh, creative appeals using new channels (non-letters). Start writing the FYE plan in May and the CYE in November.

Metric(s): Have any additional data requests or changes submitted at least two months in advance. Incorporate A/B testing. Solicit classifications rarely reached, such as 'in memory'/'in honor' or one-time donors. Improve campaign dollars in the door by 10% over FY19.

Outcome: Using a strategically crafted plan, the FYE and CYE campaigns will result in gifts to IWU that otherwise may not have happened. Continually evaluate efforts to retain donors from FY19, while reactivating lapsed donors and acquiring new donors.

3. Leadership Donors: Develop leadership donor strategy focused in Illinois (Chicago) based on capacity and giving history.

Metric(s): Determine number of 'unassigned AUX' donors after MGO prospect review. Assess overall portfolio of leadership donors and baseline of giving to move to the next level of giving.

Outcome: Portfolio management determined by number of prospects - using personal contact as a strategy for increased leadership gifts such as scholarships (annual and multi-year) and other opportunities. This should result in moving donors through the pipeline to assigned status.

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ANNUAL GIVING GOALS/WORK PLAN (cont'd)

4. Reunions: Reconstruction of reunion programming with the *primary emphasis on giving*; secondary purpose of engagement. Heavily market program to reactivate lapsed donors and acquire first-time donors. Work with MGOs to identify CORES in reunion years who can give a major gift or planned gift.

Metric(s): Increase committee involvement, marketing efforts and early identification. Each class will have a giving goal and expectations based on quantifiable data discussed with MGOs and leadership. Assess each class giving level to determine achievable and elevated goals. Implement five year giving program for 50th year class reunion - beginning with 46th year.

Outcome: Through increased participation we expect an organic increase in giving. Also expected is strategic conversation with CORES who will be encouraged to make large gifts for their reunion year or set planned giving.

5. All In For Wesleyan: Use the successful formula from 2019 to try to achieve the highest revenue generating event ever. Increase awareness on campus of this event with both faculty and students. Create a lounge atmosphere at All In headquarters to promote participation from alumni and volunteers. Possible beta test with various departments on campus for designated giving.

Metric(s): Raise \$500,000 on event day. Retain donors who historically give on All In, reactivate donors who have lapsed and craft specific messages to acquire first-time donors. Increased opportunity for giving with departmental designations.

Outcome: Increased footprint of All In for Wesleyan to reach new donors as well as convince current donors to give an additional gift. Greater involvement from campus community.

6. Phonathon: Use Slate to manage the phonathon in FY20 to create seamless process in tracking to database. However, there will be manual dialing for fall semester (until Telephony is launched for Slate).

Metric(s): Raise \$100,000. Use the phonathon calls to provide information about upcoming events on campus and other stewardship efforts.

Outcome: Develop alternative strategy to determine ways to improve possible shortfall of dollars in the door. Such as creating the first phonathon webpage. Work with Advancement Operations for spring to use Telephony (Slate) automated dial.

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ANNUAL GIVING GOALS/WORK PLAN (cont'd)

7. Loyalty Society: Rebrand and restructure Loyalty Society program with 1) name that resonates with IWU (i.e. 1850 Society); 2) create meaningful incentives and benefits; and 3) shows impact of collective group.

Metric(s): Track increase in dollars and donors by connecting these programs to other giving opportunities such as, Phonathon, All In for Wesleyan and other giving campaigns. Promote both the Loyalty Society and our Gift Clubs in all Advancement collaterals and on our website.

Outcome: By revamping both programs we should see an increase in both dollars in the door and participation levels. This should also improve donor retention.

8. Stewardship: Increase stewardship efforts and communications for annual giving donors. Be mindful of how often the University is contacting alumni, parents and friends.

Metric(s): 25% of communications will be non-ask to increase stewardship efforts. Implement a first-time donor program. Consider special events and/or unique opportunities for donors of a certain level. Send more thank you cards, write more personal notes on letters and create more social media thank you messages and videos when possible.

Outcome: Ensure constituents feel valued, appreciated and willing to continue to give back to the university. "You are more than just a dollar." Improve communication with campus to avoid over-saturating our constituents.

9. Student Engagement: Craft a known presence on campus with current students and provide greater context of the importance of philanthropy and giving to IWU.

Metric(s): Create and implement a senior class giving strategy that will harness more participation and, therefore, more dollars donated by seniors. Partner with the Office of Student Affairs to increase awareness amongst students about what Alumni Engagement means before graduating IWU.

Outcome: More involvement from the Engagement team at student initiatives such as Turning Titan. More giving and participation from all students during All In for Wesleyan. Turn first-time donors into retained donors.

ILLINOIS WESLEYAN ENGAGEMENT TEAM

ALUMNI ENGAGEMENT GOALS/WORK PLAN (cont'd)

1. **Events:** Create an experience for alumni events that provides relevant content, engages constituents and brands the University in the regions (developing specific goals for each region).

Metric(s): Increase overall attendance by 20%, while attracting new alumni to the events.

Outcome: Higher event attendance will ideally lead to higher participation in volunteerism and giving.

2. **Volunteerism:** Increase and improve alumni volunteerism in key regions.

Metric(s): Develop at least 10 key regions and build regional committees to include at least 10 members, with defined roles and responsibilities (including photographer, young alumni focused, marketing, social media ambassador, diverse participation, venue scout, etc.).

Outcome: Volunteer engagement increases propensity to invest in University.

3. **Affinity Groups:** Increase student connections with alumni, further develop committees and philanthropy within groups.

- a. **Council for IWU Women:** Rebrand and improve marketing to attract a broader and more diverse audience (including students).

Metric(s): Increase student connections by 4.5 points to 12% of women student population. Total women population in 2018 - 880.

Outcome: Increased engagement by alumnae and students.

- b. **International Alumni Network:** Continue to develop committee and activities to connect alumni to students, each other and the University.

Metric(s): Increase volunteers from 2 to 10 with defined roles.

Outcome: Increase connectivity and engagement from international alumni.

- c. **Pride Alumni Network:** Increase number of volunteers and philanthropic efforts.

Metric(s): Increase committee from 5 to 10 and scholarships from 2 to 3.

Outcome: Increase engagement and philanthropic opportunities by LGBTQ+ and TGNC alumni.

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ALUMNI ENGAGEMENT GOALS/WORK PLAN (cont'd)

- 4. Student Engagement:** Introduce and promote engagement opportunities to current students through partnerships with Student Affairs and increased visibility of AE in student spaces.

Metric(s): Establish baseline of AE/student connections and increase each year.

Outcome: Increased engagement pre and post-graduation.

- 5. Engaged Giving:** Promote giving in correlation with events (online and onsite).

Metric(s): Track methods of gift receipt - similar to appeal codes, find out which method is being utilized (i.e. 'Give Now' button, on-site event materials/envelopes, etc.). Track giving activity at events.

Outcome: Increased overall giving from those who attend alumni events.

- 6. Data:** Work with Operations to build functionality to produce accurate alumni engagement score.

Metric(s): Add reporting tools to illustrate and measure engagement score.

Outcome: Clear picture of strengths/weaknesses and how to better engage alumni.

ILLINOIS WESLEYAN ENGAGEMENT TEAM

ENGAGEMENT COMMUNICATIONS GOALS/WORK PLAN

1. **GOAL:** Create and develop an engagement communications strategy for the Office of Advancement that incorporates a ‘push-pull’ (sharing and asking for information) methodology that encourages our constituents to engage in more creative and impactful ways.
 - a. **PURPOSE:** To provide consistent, high-quality internal and external messages reflecting the Illinois Wesleyan University Advancement Office mission, institutional identity, positioning, and strategic priorities. As well as maintain a strong connection of the IWU brand across all marketing materials representing IWU.
 - b. **TACTICS:**
 - i. Marketing and communication will funnel through the Assistant Director of Engagement Communications to overview writing content and/or editing materials via communications channels.
 - ii. Assistant Director of Engagement Communications will work closely with Advancement teams to develop creative and impactful materials
 - iii. Reviewing previous materials (design, layout, messaging) and analyzing constituent behavior (response, performance, indicators) to determine best ‘practice’ for upcoming projects.
 - iv. Acting as conduit for departmental awareness and collaboration of marketing communications, programs, and events to keep staff abreast, knowledgeable and on schedule for projects.
 - v. Creation of Alumni email newsletter, Philanthropy email newsletter, and template for departmental and affinity newsletters will conglomerate flow of information to constituents
 - c. **OUTCOME:** Providing Advancement staff with clarity of the role, how it supports operations and marketing for various programs, events and activities creating a holistic understanding of Advancement Communications.
 - d. **TIMEFRAME:** August 2019

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ENGAGEMENT COMMUNICATIONS GOALS/WORK PLAN (cont'd)

2. **GOAL:** Create a digital storehouse with a calendar and timeline for marketing communications enabling access to Advancement staff for ongoing review and updates.
 - a. **PURPOSE:** To be mindful of the volume and frequency of messages the Titan Community receives to ensure integrated and meaningful communication provoking an action or reaction.
 - b. **TACTICS**
 - i. See *GOAL (1)*. Develop a viewable Google doc to be housed on Slate that is accessible at all times with members of the Advancement team.
 - ii. The FY20 Communication Plan and Calendar will include project names, team(s) responsible, segment types, donor types, communication channel(s), and any other special note.
 - c. **OUTCOME:** Providing all Advancement staff with a central location of all communications leaving our office and projected time frame as well as access to materials.
 - d. **TIMEFRAME:** September/October 2019

3. **GOAL:** Review and revise department's web presence to ensure consistency in messaging and content.
 - a. **PURPOSE:** Effective and purposeful communication is essential to Illinois Wesleyan's success. Consistency among information found on the web ensures the confidence the Titan Community has in IWU and as well as protects the IWU brand.
 - b. **TACTICS:**
 - i. Search and Identify all URLs in relation to Advancement to be sure all URLs are still needed/active and determine updates/wish list.
 - ii. Research other Universities as a learning opportunity and ideas/strategies on word choice, style, layout, etc.
 - iii. List volunteer opportunities with link to form for participation and actively promote to alumni to increase engagement with current students and University
 - iv. Work with Affinity Groups to update web pages and other materials in support of programs and events.
 - c. **OUTCOME:** Consistent messaging and information will lead to unanimity and clarity from the Titan Community and create a better user experience.
 - d. **TIMELINE:** October/November 2019

ILLINOIS WESLEYAN ENGAGEMENT TEAM

ENGAGEMENT COMMUNICATIONS GOALS/WORK PLAN (cont'd)

4. **GOAL:** Create and implement a social media strategy that increases the digital footprint for the Office of Advancement, IWU Alumni Association, and overall alumni community.
 - a. **PURPOSE:** Social media is an excellent platform to reach users of all ages, especially youth. It serves a communication opportunity to market IWU and touch users in their personal lives, as well as identify IWU influencers and social ambassadors.
 - b. **TACTICS:**
 - i. Review the FY20 Communication Plan and Calendar to ensure social media posts coincide with other marketing efforts throughout the year.
 - ii. Research Universities and influential social media accounts for engaging content and evaluate how their strategies can be implemented on the IWU Alumni Association accounts. Quality > Quantity.
 - iii. Hire an IWU student worker who is studying Marketing/Communication, or a similar field, to manage the push of social media messages, photos, and interactions with instruction, guidance, and approval from the Assistant Director of Engagement Communications.
 - iv. Increase followers and interactions on Facebook and Twitter by 4%. (*Current Facebook: 1,217 liked page, Current Twitter: 1,424 followers*)
 - c. **OUTCOME:** Effective usage of social media platforms increases brand awareness and authenticity. It encourages engagement and supports the Titan Community and University.
 - d. **TIMELINE:** November 2019

5. **GOAL:** Utilize the Slate Scholar application (learning tool and database) and Slate Certified program (classroom style learning) to increase proficiency in the following Slate components: Deliver (emails), Queries (data mining), and Reports (data displaying).
 - a. **PURPOSE and OUTCOME:** Diving into Deliver will help diversify the look and feel of messages exiting the Advancement office, as well as streamlining communication flow, email building, and organization of messages. Focusing on query and report building will alleviate time constraints the Advancement Operations team faces.
 - b. **TIMELINE:** January/February 2019