Fellow Cornellians,

The introduction to Cornell’s strategic plan explains why comprehensive growth is essential to Cornell’s continued viability:

*At the end of the day … the risk of doing nothing is far greater than the risk of growth. Our alumni and friends must help us to mitigate [known risks] by supporting Cornell at greater levels than ever before during our period of growth. Doing so will ensure that Cornell and Cornellians thrive well into and beyond the 21st century.*

The strategic plan sends a strong signal to more than 15,000 Cornellians worldwide: they are an integral piece of the college’s future.

This past summer, eight alumni came together to discuss what it will take to increase alumni support of Cornell.

The results of our July alumni survey were clear. The best ways Cornell can develop programs to serve alumni are through reunions with other Cornellians and with educational programming – such as lectures and seminars – in cities where they live. Alumni want to help recruit new students and serve as career mentors. And a lifelong Cornell experience will be enriched with varied opportunities to interact with professors, class agents, and other alumni.

Most importantly, Cornellians are poised and ready to face the challenges of strengthening the alumni community to support the college’s goals, and connecting all generations of Cornell alumni.

Cornell has already taken steps to support greater alumni participation in the life of the college by combining its alumni engagement and annual giving goals into a single department.

We combined the survey responses with our assessment of the college’s alumni and annual giving programs and developed recommendations in categories related to off-campus events, Homecoming and reunions, giving, communications, technology, volunteer programs, and student and young alumni programs. Recommendations include:

Develop ways for Cornellians in cities across the world to connect to each other, continue learning through Cornell, recruit new students, mentor current students, and support alumni personally and professionally after graduation.

Strengthen Cornellians’ connections to the Hilltop, especially through Homecoming and reunions, by developing programs that attract greater numbers of alumni back to campus and compel more alumni to give.

Empower alumni to lead the community to greater levels of involvement by increasing the number, importance, and support of volunteers, and by creating ways for alumni to easily become ambassadors for Cornell and highlight the college through technology and social media.
Alumni leaders will strengthen the alumni community and forge a stronger Cornell. Over the next few months, we will recommend that Cornell’s alumni engagement, annual giving staff, and the Alumni Board of Directors pursue a comprehensive system that supports an increase in alumni involvement and aligns alumni efforts with the goals of Cornell’s strategic plan.

We hope these recommendations channel the passion of more than 15,000 Cornellians toward an even better Cornell.

Sincerely,

Alumni Task Force

Lynn Ross Cope ’87, Chair
Deb Stewart Bowman ’74
Becky Brown ’75

Colin DeVaughan ’94
Shawn Henning ’96
Fred Holtz ’86

Paul Hutchison ’87
Diego Verdugo ’12
Doing More Together:

Alumni Engagement & Annual Giving at Cornell College

In order to support the success of the college’s strategic plan and expand the culture of engagement and philanthropy among Cornellians, the Division of Alumni & College Advancement will meld the work of alumni engagement and annual giving within a single team—the Office of Alumni Engagement & Annual Giving—to further encourage alumni, parents and friends to participate broadly in the life of the college.

While the proposition of merging Alumni Engagement and Annual Giving programs represents a shift in the culture of advancement at Cornell, it recognizes the proven connection between giving to the college and engaged and involved alumni. Two studies of the MIT Alumni Association—one in 1988 and another in 2002 to confirm the findings of the 1998 study—illustrated purposeful alumni engagement positively affected participation and consistency in giving and size of gift.

In 1998, MIT merged its alumni relations and annual fund programs and increased support for reunions, implemented new activities such as "MIT on the Road," renewed its emphasis on students and young alumni, and invested in technology resources for connecting with alumni.

The 2002 study found the following:

- Rates of participation in the Alumni Fund were significantly higher among involved alumni: reunions attendees (30 points higher than all alumni), volunteers (20 points higher), and club members (13 points higher).
- Involved alumni were shown to be 1.4 to 2.1 times more likely than all alumni to be consistent donors (those who gave four or more years out of five).
- Involved alumni were 2 to 6 times more likely than the general alumni population to make cumulative gifts of $2,500 or more over 5 years. The strongest ratios were at the $25,000 and greater level.

Given the importance of individual philanthropy to the college and given the strong correlation between alumni engagement and alumni participation, leveraging alumni engagement into philanthropy is of critical importance to the college’s future.

While there should be continued focus on engaging the college’s donor population, there should be a renewed focus on strategically engaging the broader alumni population through events, reunions, volunteer opportunities, technology and communications and converting that engagement to philanthropy. Focusing and incrementally expanding these efforts will create a larger community of institutional stakeholders who will take ownership for the advancement of Cornell.
Process for Alumni Engagement and Annual Giving Planning

May 2013

I. Clarify Organizational Mission and Programmatic Efforts
   a. Brainstorm programs: What are we already doing?
   b. Specify the purposes of the AEAG team and any philosophy and values that guide it: What should we be doing?
   c. Assess programs and set goals: What will we do in the short- and medium-terms to fulfill this mission? Who will do it?
      i. Short-term (by end of CY 2013)
      ii. Medium-term (by end of FY2014)

June 2013

II. Initiate Planning Process
    a. Assemble 8-member alumni Task Force—see proposal on the following page(s)
    b. Establish process and timeline

July/August 2013

III. Gather the Data: Assess External and Internal Environments
    a. Conduct alumni survey and additional brainstorming
    b. Assess current AEAG efforts
    c. Develop aspiration benchmarks for AEAG efforts

August/September 2013

IV. SWOC: Identify Strategic Issues
V. Formulate Strategies to Manage Issues
VI. Coordinate Strategic Plan for Alumni Board

October 2013

VII. Review and Adopt Plan(s) at October Alumni Board Meeting
VIII. Create Vision

November 2013 and beyond

IX. Implementation
    a. Buy-in should be created among Alumni Board members, Trustees and other active college volunteers and donors. From this group, an implementation task force should be appointed to establish a new board structure and define roles.
    b. Goals should be shared with AB members to set an implementation timeline and begin execution.
    c. Create a communication strategy to inform audiences of any new plans and to increase demand for new programs.

X. Build in Intermittent Review of Strategies and Goals
Alumni Engagement and Annual Giving Task Force

In summer 2013, Cornell College President Jonathan Brand and Vice President for Alumni & College Advancement Pam Gerard convened a Task Force with the following purpose and charge:

**Purpose of the Task Force**
The Task Force studied current college alumni engagement and annual giving efforts and recommended specific approaches to enhance the college’s ability to grow participation among Cornell alumni.

A successful alumni engagement program will be positioned to communicate key institutional messages to alumni in a variety of ways, allowing the college to leverage the strength of the messages to create institutional advocates.

**Charge for the Task Force**
The Task Force will

1. Reach consensus on the elements of “alumni engagement” to guide its work during this study period;
2. Catalog alumni relations and annual giving programs, activities and communications currently in place, as well as outreach efforts college-wide that could be harnessed to expand the college’s programs;
3. Brainstorm needs and opportunities for strengthening or broadening alumni engagement;
4. Recommend ways to organize efforts, especially with regard to institutional and volunteer leadership.

**Composition of the Task Force**

8-member Alumni Task Force

- Lynn Ross Cope ’87, Chair, Task Force / Member, Alumni Association Board of Directors
- Deb Stewart Bowman ’74, Alumni Association Board of Directors
- Becky Brown ’75, Alumni Association at-large
- Colin DeVaughan ’97, Alumni Association at-large
- Shawn Henning ’96, Alumni Association at-large
- Fred Holtz ’86, Alumni Association Board of Directors
- Paul Hutchison ’87, Alumni Association Board of Directors
- Diego Verduno ’12, Alumni Association at-large

**Staff Liaisons**

- Dustin Ross, Senior Director, Alumni Engagement and Annual Giving
- Lisa White, Director, Alumni Engagement and Annual Giving
Alumni Engagement & Annual Giving Programs

The Task Force found that while some alumni activity has a strong foundation, all of it requires strengthening. The programs are of varying quality, are poorly integrated, inefficient, and inadequate for nurturing the bonds essential to lifelong alumni engagement and support. At root is a lack of volunteer support; a confusing patchwork of events and communications; and confusion on-campus about the goals of the Alumni Association. Because of these, broader institutional messages fail to come through clearly, and opportunities to forge meaningful connections between the college and the vast majority of its alumni are lost.

The Task Force looked specifically at programs in seven categories: 1) regional engagement; 2) reunions and Homecoming; 3) volunteer opportunities; 4) student and young alumni engagement; 5) technology; 6) annual giving; and 7) marketing. What follows are summaries of the Task Force’s assessments for each of these areas.

Regional Engagement

Regional engagement efforts give Cornell a presence beyond the Hilltop, delivering programs, services, massages and events to alumni across the globe. Developing a regional engagement strategy involves a number of considerations, including deciding where you want a regional presence, what programs you need to deliver, and what model will you employ.

Cornell’s current regional engagement model encompasses approximately 15-18 events throughout the year in 8 primary areas (Chicago, Greater Cornell, Twin Cities, Denver, Des Moines, Phoenix, Washington DC, and St. Louis) mostly according to the number of alumni in those areas. Events are largely staff-driven, and Cornell charges admission for most events to offset expenses.

Regional Program Assessment

- Effectiveness Measure: needs improvement

In light of these findings, the Task Force identified the following weaknesses in the college’s regional alumni programs:

- While in most markets a 10% attendance rate is considered successful, events vary in success by region and rarely have increasing attendance rates.

- All regions struggle with volunteer engagement in planning and hosting events. The only area with a formal, recognized club structure is Cornell College Club of Chicago; other areas
have primarily used volunteers only on calling committees, which has not been compelling for volunteers or staff.

- There is not a clearly defined structure for planning and assessing regional programs.

Reunions

- Effectiveness Measure: meets expectations but could use improvement

Effective reunions offer alumni a chance to return to campus at a milestone moment in their life as an alumna/us. As we try to appeal to number of alumni at the same time, we have to ask how can we create a program that meets the needs and expectations of a mobile, growing, changing, diverse alumni body?

Essential to reunions are recruiting and empowering volunteers to articulate what would compel their classmates to participate. With that, we need to engage and connect alumni before their reunion by assessing how they are communication between reunions and how we might quantify and support that activity. We should also strive to offer engaging, substantive educational programming; ample opportunities to network with fellow alumni with similar interests, experiences or aspirations; and the chance to celebrate friendships, both old and new.

Reunions Assessment

Cornell hosts quinquennial reunions – 5th through 65th – during Homecoming weekend each fall. While Class Agents are given the opportunity to help plan their reunions, volunteer committee involvement varies widely by class and . The 50th class reunion has a more involved volunteer structure, class giving component, and extensive programming.

There are limited expectations for Class Agent activity and communication between reunions, no structured opportunity for reunion giving, and few affinity reunions.

Volunteer Programs

- Effectiveness Measure: poor

Volunteers are the lifeblood of any advancement effort. Volunteering reinforces an alumna’s/us’s connection to the institution, and their work helps reconnect others at the same time. They extend the reach of our programs, they carry institutional messages on behalf of the college, and they provide the foundation where we establish programs for admission, fundraising, alumni and other outreach activities.

In addition, volunteers expect to be developed and recognized, and they expect the college to provide them with leadership opportunities.

As the volunteer leaders, the Alumni Board should strive to

- Establish board priorities to advance the college’s goals
- Identify leaders for chapter, classes, affinity groups, and the board itself
• Promote event attendance, volunteering
• Support the advancement of the institution
• Cultivate and solicit donors
• Ensure effective strategic planning
• Advise staff on programs
• Enhance the image of the institution

Volunteer Programs Assessment

While Cornell utilizes volunteers in a number of capacities (Alumni Board of Directors, Parents Executive Committee, Young Alumni Advisory Committee, Centers advisory boards, Class Agents, lecturers, panelists, mentors, admission volunteers, etc.) these opportunities lack support systems, meaningful recognition, and professional development and training. Due to the weak support and data systems, it is a struggle to coordinate volunteers among all campus partners.

Student & Young Alumni Engagement

• Effectiveness Measure: good foundation, needs improvement

“If you want to have a generous alumni body giving time and money once they graduate, they need to be aware of the importance of philanthropy while they’re students. That message has to be delivered early. It’s probably too late if institutions wait until they’re juniors and seniors.”

Student Engagement

As the quote above states, the alumni engagement lifecycle has to begin on—or before—day one. Student and young alumni programming strives to create this culture of philanthropy on campus and among the student body-- when you see the campus actively working to generate resources and advocacy for the institution.

While effective student engagement programming needs to fit the personality of the campus, it should strive to build on existing campus traditions and culture, collaborate across different areas on campus, and be viewed as a long-term investment of resources.

Young Alumni Engagement

Millenials/Gen X has changed the engagement and philanthropy landscape. They expect to be served before they give back, prefer a continuum of volunteer offerings, rely heavily on technology and social media to stay connected, and prefer to support what appeals to them emotionally in the moment.

Student & Young Alumni Programs Assessment

Cornell’s current student and young alumni programming focuses mostly around philanthropy, with Student Philanthropy Initiative—a fledgling student group—and Young Alumni Advisory Committee and Young Alumni Giving Month. Activities also include New Student Orientation, Senior Giving Campaign, Senior Send-off, and Senior Reception.

Technology
• Effectiveness Measure: needs overall improvement

Technology and social media should strive to connect alumni to each other and make it easier for them to connect with the college. Content needs to be interactive, sharable, and ideally user-generated.

With the rise of social media, Alumni may no longer need to visit their alma mater’s Web site for updates on athletics teams, news, or content from a school’s publication. Likewise, “walled garden” communities are declining while students and alumni connect on free and open social networks.

Technology Assessment

Cornell implemented myCornell, an online network of more than 14,000 Cornellians, in Spring 2013. By mid-September 2013, 15% of all alumni had activated an account on the site. Users are able to submit class news, update their information, search for alumni in their cities and career fields, and give.

Additionally, the college produces a monthly newsletter for alumni and parents. The college’s social media presences—primarily Facebook and Twitter—are managed through the central marketing office.

While the technological tools channels are developed to varying degrees, there is no overall online strategy or tracking. From a content standpoint, it is an ongoing struggle to create and distribute meaningful content to alumni.

Annual Giving

• Effectiveness Measure: needs improvement

"While oversized gifts get all the headlines, the most important step occurs when alumni first demonstrate willingness to financially support the school.”

Annual giving programs introduce an institutional giving culture, stressing the importance of teaching and reinforcing the giving behavior they expect from their alumni; they build donor loyalty; they promote ongoing institutional affinity—they create and sustain a relationship with prospect audiences; they grow donor value—they identify loyal and leadership annual supporters, who are really interested in maximizing philanthropy at your college.

Annual giving programs generally use a multi-channel marketing approach, and the funds generated support the operations of an organization, are more flexible than restricted funds, and are available for immediate use. In most organizations, annual giving programs are a shared responsibility that involves engagement, marketing, advancement services.

Annual Giving Programs Assessment

Cornell has moderately effective direct marketing programs (phone, mail). The college has mailing addresses for 86%, phone numbers for more than 71%, and email addresses for more than 60% of its more than 15,000 alumni. Through these channels, the college employs strategies that focus
primarily on retention and reactivation, and little on acquisition except among students and young alumni.

Annual giving programs face challenges in two primary areas—increasing the number of overall donors and the number of leadership annual donors. The number of alumni donors hit a 3-year high in 2011 with more than 3,000 annual fund donors. That number dipped drastically in 2012 only to rise to just over 2,800 annual fund donors in 2013.

Similarly, the number of alumni Annual Fund Presidents Society members has been stagnant for the last three years.

The Next Era in Alumni Engagement & Annual Giving: Recommendations

The Task Force has developed the following recommendations with the goal of creating an alumni engagement program for the University that “perpetuates and enriches the lifelong connection all Cornellians have to the college and to each other.”

Though focusing on seven areas (Marketing and Market Research, Technology, Reunions, Student and Young Alumni Engagement, Volunteer Programs, and Regional Engagement), these recommendations are not stand-alone initiatives. They are designed to support one another, and thus should be considered as a whole. Moreover, how these changes are implemented is as important as the improvements themselves.

Marketing

1. Focus engagement messages.
2. Develop ambassadors to spread Cornell’s message on social media and elsewhere.
3. Measure and set a goal to increase addresses, email, phone and other contact data on record for alumni.
4. Enhance case for support by targeting and personalizing messages to appeal to different generations.

Technology

1. Enhance the menu of opportunities for alumni to engage with the college online as a compliment to traditional print media.
2. Develop a convenient interface for alumni to connect with Cornell and each other.
3. Leverage students, faculty, and alumni as creators, curators or advisers of technological engagement solutions.
4. Enhance traditional events with social media.

Reunions and Homecoming
1. Quantify the lifetime value of reunion attendance.
2. Identify and support or enhance non-reunion year class communications and engagement.
3. Develop affinity and cluster reunions as a way to increase Homecoming attendance.
4. Work to personalize annual giving solicitations through robust class and/or affinity volunteer structures.
5. Expand program offerings, especially focus on student-alumni programming and on-campus affinity programming.

Students & Young Alumni Engagement

1. Increase engagement metrics in the first X years after graduation.
2. Quantify the lifetime value of a young alumna/us who gives within their first five/ten years out.
3. Invest in student engagement programs as the college’s first chance at setting the stage for alumni engagement and giving.
4. Develop regional networks for new and young alumni in target markets.
5. Leverage student and young alumni data to connect them meaningfully within region, industry or affiliation areas.

Volunteer Programs

1. Develop volunteer opportunities that allow alumni and students with similar professional interests to connect.
2. Catalog and enhance volunteer opportunities—from micro-volunteering to leadership roles—by tracking alumni participation and interests and creating “on demand” opportunities.
3. Coordinate and enhance the recruitment, training, support, development, and recognition of all volunteers.

Regional Engagement

1. Create a culture of volunteerism for Cornell.
2. Identify metrics for regional engagement events and quantify lifetime value of event attendees.
3. Develop regional “Block Captains” and volunteer corps to identify and develop opportunities for area alumni.
4. Enhance program offerings and marketing to increase event participation.