Strategic Planning FY12

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Associate Vice President
Engagement and External Relations

Tim Simmons, Sp ’82
MUAA Executive Director

Brenda Skelton
Principal, Brenda Skelton Consulting
<table>
<thead>
<tr>
<th>Goal</th>
<th>Result</th>
<th>Variance</th>
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<tbody>
<tr>
<td>$75 million contributed</td>
<td>$69.60M</td>
<td>($5.4M)</td>
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<tr>
<td>14.5% alumni participation</td>
<td>14.4%</td>
<td>(.1%)</td>
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<tr>
<td>2.29 alumni engagement score</td>
<td>2.31</td>
<td>+.02</td>
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Strategic Plan 2010-2012

PURPOSE
Develop a passionate community of Marquette alumni in support of the university and each other.

GUIDING PRINCIPLES
Continuous learning
Inclusivity of all people
Finding God in all things
Lifetime alumni relationships
Excellence, Faith, Leadership, Service
Strategic Outcomes

Increase internal alumni engagement score annually. The annual goal will be set each year.

Secure participation in annual giving from all current National Board members, former National Board Members and alumni chapter leaders.
Chapter Evaluation:
Evaluate and restructure, when and where appropriate, Club and CIB organizations and programs to increase their effectiveness by adding value to their respective alumni constituents.

Work led by Chapter Evaluation Committee:
• Expanded and refined communication among chapters/volunteers
• Defined roles of volunteers at all levels, and relationship to staff
• Refined chapter roles and relationships in Milwaukee
• Created transparency around fiscal issues
• Changed chapter structures (to committee-based) where appropriate
Interactive Marketing:
Optimize interactive media programs and capabilities to ensure greater awareness and involvement of alumni.

Work led by Interactive Marketing Committee:
• Developed the new MU Connect
• Redesigned national e-newsletter and launched new segmentation strategies
• Launched new online opportunities with eye toward the “30%”
  – National Marquette Day
  – marquette.edu/faith
• Social media used to increase attendance at club/chapter programs
• National Board involvement influenced more internal collaboration
Scholarship Aid:
Create awareness and involvement of alumni in the university’s scholarship aid initiatives through partnering with University Advancement.

Work led by Scholarship Aid Committee:
• Focus group feedback contributed to Donor Relations effectiveness
• Led training of board on scholarship aid need/process
• Valuable feedback on *Give Marquette* and endowed scholarship campaign plans and materials
• National Board more philanthropic than ever
Alumni Involvement:
Design and implement programs that add value for underrepresented alumni.

Work led by Alumni Involvement Committee:
• Seven Essentials of Highly Engaged Alumni”
  – “Science” of what we do
  – Tool for planning and evaluating programs
  – Used to identify gaps
  – Guide for new program development
• Focus group approach employed – “listening”
Students and Young Alumni:
Leverage alumni in recruiting and retaining students to promote young alumni involvement upon graduation.

Work led by Students and Young Alumni Committee:
• Launched Marquette Student Alumni Ambassador program
• Improved National Board student director recruitment process
• MUSG relationship enhanced
• Student Development Office and Registrar collaboration
• Developed “Marquette Nation” -- comprehensive student engagement plan
Strategic Planning Process

Planning Process

Discovery & Analysis Phase

Develop Road Map of Future Action

Implement the Road Map

Measure Results, Adjust & Improve
Strategic Committee Roster

Volunteers:
Greg Curtis – Chair,
Jim Milner and Gina Ryan – Seniors
Michael Grimaldi and Paul Porretta – Juniors
Gary Bettin, Katie Dillow, and Francie Reding – Sophomores
Joel Andryc and Catherine LaFleur -- Freshmen

Staff:
Meg Brzyski, Tim Simmons

Facilitator:
Brenda Skelton
Creating the Future

BRIDGING THE GAP:
DEFINING AND IMPLEMENTING
STRATEGIC INITIATIVES TO MOVE MUAA TOWARD THE VISION

VISION (PURPOSE):
Our desired future state of MUAA

`Current State’
of MUAA

MUAA Guiding Principles
The Bedrock of your Strategic Plan (not changing)

**PURPOSE** (vision)
Develop a passionate community of Marquette alumni in support of the university and each other.

**GUIDING PRINCIPLES**
Continuous learning
Inclusivity of all people
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### Strategic Planning Timeline: Overview

<table>
<thead>
<tr>
<th>Event</th>
<th>Dates</th>
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<tbody>
<tr>
<td><strong>Kick off of MUAA Strategic Planning 2013-16</strong></td>
<td>Sept. 24, 2011</td>
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<tr>
<td>- SP Committee kick-off meeting</td>
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<tr>
<td><strong>SP Committee conference calls/Staff support</strong></td>
<td>Weeks of --</td>
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<tr>
<td>- Data review and analysis</td>
<td>Oct. 17</td>
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<tr>
<td>- Develop SWOTT</td>
<td>Nov. 14</td>
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<td>- Define and prioritize key strategic initiatives</td>
<td>Dec. 12</td>
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<td>- Jan. 9</td>
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<tr>
<td><strong>National Board meeting</strong></td>
<td>Jan. 20-21, 2012</td>
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<td>- Working session to get update on SP Committee’s work, offer feedback/input and approve work to date</td>
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<td>- SP Committee meets following National Board</td>
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Strategic Planning Timeline: Overview

<table>
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<th>Date(s)</th>
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<tr>
<td>SP Committee conference calls</td>
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<tr>
<td>• Define resources needed for each key strategic initiative;</td>
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<tr>
<td>• Create SMART goals for each initiative</td>
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<td>Weeks of --</td>
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<td>Feb. 6 or 13</td>
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<td>Mar. 19</td>
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<td>Apr. 9</td>
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<td>Apr. MUAA National Board Meeting</td>
<td>Apr. 27-28</td>
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<td>• Full Board presentation of Strategic Plan</td>
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<td>• Update on MU University-wide strategic plan</td>
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<td>Organizing the Strategic Plan into a Road Map: conference calls --</td>
<td>May (TBD)</td>
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<td>• Committee structures and rosters</td>
<td>June (TBD)</td>
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<td>• Work plans to support each initiative and each committee</td>
<td>July (TBD)</td>
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<td>September MUAA National Board Meeting</td>
<td>Sept. 21-22, 2012</td>
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<td>• Orientation to new directors</td>
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<td>• Kick off of redefined committee structures</td>
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<td>• Launch of SP2013-2016 key initiatives</td>
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MUAA Strategic Planning

Questions?

Concerns?

Feedback on process or timeline?