

Chapter Leader Onboarding

Module 3: Alumni Engagement & Effective Planning



UNIVERSITY OF
GEORGIA / **ALUMNI**

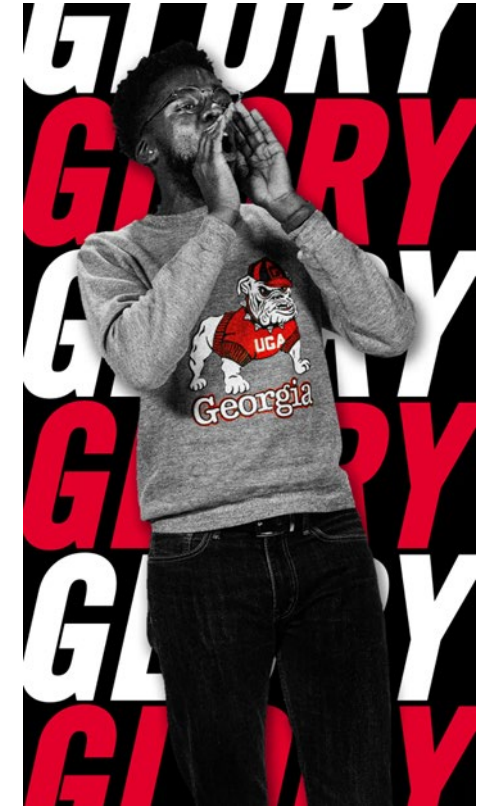


Intended Learning Outcome

Generate SMART goals to enhance alumni engagement through relevant programming, enhanced connections, and effective communications

Alumni Engagement

- The Alumni Chapters Program works to advance the mission of the UGA Alumni Association through meaningful experiences that strengthen ties between alumni and their communities and inspire alumni to deepen their connections with the university
 - **Essentially, Alumni Chapters around the globe work to enhance alumni engagement**



Alumni Engagement cont.

- **What is alumni engagement?** Activities that are valued by alumni, build enduring and mutually beneficial relationships, inspire loyalty and financial support, strengthen the institution's reputation and involve alumni in meaningful activities to advance the institution's mission
- The Alumni Association relies on the Council for the Advancement of Education (CASE) to inform best practices and policies for engaging alumni

Alumni Engagement cont.

- The Alumni Association engages the UGA alumni base using the categories of **volunteer, experiential, philanthropic, and communication** provided by CASE
 - Alumni Chapters are one piece of this approach
- The UGA Alumni Association inspires **alumni engagement** through **relevant programming, enhanced connections, and effective communications**

Alumni Engagement & Effective Planning

- Chapter's strategic plans should consist of **SMART Goals** and events that align with **Division of Development & Alumni Relations** priorities:
 - **Fundraise** for scholarship, experiential learning, facilities, active learning, student well-being, and faculty support
 - Participate in Giving Day and advocate for UGA initiatives and funds
 - **Strengthen the donor pipeline** through data-driven engagement with students, alumni, and friends
 - Donorship can begin with a meaningful experience at Chapter event
 - **Expand industry engagement** and cultivate support for the Innovation District
 - There are other units within DAR working to create new opportunities for student entrepreneurship
 - **Engage students in career development and mentorship**
 - Join the UGA Mentor program to help students succeed and achieve their goals

Effective Planning

Adapted from Charlotte Chapter “Strategic Planning” (2023)

- To effectively plan, plan with a purpose
- Every event should have a stated goal
 - **Connect each event to a SMART goal**
- **Know your audience**
 - Alumni, families, donors, fans, etc.
 - Utilize demographic overviews provided by the Alumni Association city demographics, major employers, and regular event attendees



Effective Planning cont.

- Outline your year of programming 12 months ahead of time
 - **To be completed with an Annual Plan during the Chapter Recognition Process**
- Have all details completed 3 months before the event
- Delegation and assignment are key
- Don't force your events into a checkbox
 - There's no need to program who are not represented in your area

Effective Planning cont.

- When establishing Chapter goals and priorities, consider the following:
 - Every attendee must leave a Chapter event **feeling better about their connection to UGA**
 - Chapter events should **further the academic mission of the university** and work to **enhance the experience of current and future UGA students** in some way
 - When planning an event, ask yourself “**What are attendees learning about UGA and in what ways are they deepening their commitment to the institution?**”

Goal Setting 101: SMART GOALS

Adapted from the UGA Mentor Program

- **What is a SMART Goal?**
 - Bring structure and accountability to your Chapter planning
 - Have clear trajectories, deadlines, and attainability
 - SMART goal setting creates verifiable trajectories towards a certain objective, with clear milestones, and an estimation of the goal's attainability
 - **Use SMART goals as you develop a strategic plan for engaging alumni, families, and fans in your area**
- The following are the parts of a SMART goal:
 - **Specific**
 - **Measurable**
 - **Achievable**
 - **Relevant**
 - **Timely**

SMART GOALS cont.

- **Specific**

- Your Chapter's goals should be concrete and action-oriented
- Try to make these goals easily understandable
- A good exercise is to begin goals with an action verb, such as create, apply, develop, etc.

SMART GOALS cont.

- **Measurable**

- How will your Chapter know a goal has been achieved?
- You should be able to track progress and interpret success

SMART GOALS cont.

- **Achievable**

- While your goals should require work, your Chapter's goals should be attainable
- Does your chapter have the ability to reach the goal?
- What about the additional resources like time and money you'll need for this goal?
- Does this goal set you up for failure?

SMART GOALS cont.

- **Relevant**

- Is this goal in line with UGA and Division and Alumni Relations objectives?
- Does this goal actually achieve the intended objective?
- Alumni Chapters should **further the academic mission of the university** and work to enhance the experience of current and future UGA students in some way

SMART GOALS cont.

- **Timely**

- Your chapter's goals should have a deadline
- Set a specific time-frame for achieving a goal to hold yourself and the Chapter board accountable
 - **Consider a 3-to-12-month timeline for completion**

End of Module Quiz

- After reviewing *Module 3: Alumni Engagement & Effective Planning*, complete the following quiz.
Alumni Chapters staff will review your responses.
 - [Module 3 Quiz](#)