A PROPOSAL FOR ADVANCEMENT COLLABORATION AT IOWA
CREATING WORLD-CLASS AWARENESS, ENGAGEMENT AND SUPPORT

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The University of Iowa has a rich history and tradition of excellence placing it among the nation’s elite public universities. Alumni and friends benefit from the academic reputation of the university, the richness of arts and athletics offerings, and the outstanding discoveries and care provided by a world-class academic medical center. They exhibit pride and affinity for their chosen university. Similarly, the university benefits from alumni who excel in their chosen career or volunteer paths, who elect to share their experiences with its faculty and students, and who choose to act individually and collectively to advance the awareness and interests of the university.

A world-class advancement model will serve the University of Iowa’s constituents – students, alumni, donors, and friends – by offering sustainable coordination of campus, regional, national, and international outreach, as well as affinity based programs. These activities will celebrate and engage each constituent’s unique relationship with Iowa while placing those relationships within the constituent’s general relationship with the university. They will prime the student experience in anticipation of their role as alumni, and leverage the strengths and expertise of both alumni relations and development efforts to achieve the highest level of awareness, engagement and support for the university in the long term.

These efforts require collaboration among alumni relations, communications and marketing, and fundraising teams to successfully manage the development, maturation and evolution of relationships between alumni and friends and the University of Iowa.

To fulfill the university’s mission, we seek to build a cohesive, thoughtful, comprehensive set of programs and initiatives that are responsive to the evolution of the university.
Characteristics of World-Class Engagement

- A consistent focus on each stage of the constituent life cycle, as well as the matrix of affinities for each individual
- Ability to harness the opportunity to employ myriad technologies – social media, custom communications, video and other media
- Maintenance of a complex data infrastructure for constituent relationship management including an investment in data analytics to drive future strategies
- A seamless, collaborative network of constituent-relations professionals across campus, including development, alumni relations, collegiate and unit external relations, outreach and engagement, strategic communications, and industry relations staff
- An enhanced culture of engagement and philanthropy among faculty and staff across the institution
- A unified communications strategy that uses a singular voice and yields brand clarity, including coordinated direct marketing efforts across campus
- Exceptional customer service models across the institution, beginning with those staff on the front lines of relationship-building with alumni and friends

Defining the Needs of the University

The first step in construction of an advancement strategy is clear definition of how the university would like to engage its alumni. Deans involved in the advancement conversation articulated a desire for support of their core academic mission and expressed interest in central advancement efforts, which will allow them to nurture alumni relationships and share best practices.

The University Strategic Plan (2016-2021) details a number of areas where alumni can play positive supportive roles. These areas are consistent with the roles/needs identified by the committee. Mentoring, involvement in the research process, general engagement, and philanthropic support are among the priorities.

As the following figure illustrates, the Iowa campus sees wide-ranging roles for its alumni. These roles range from alumni serving as sources of financial support, expertise, advocacy, networking, enthusiasm, and affinity.

The figure contains the traditional roles assigned to alumni – as sources of financial support, as ticket buyers/fans, and as attendees/participants at university events – but also identifies important functions directly related to the academic missions of colleges and departments. Alumni are viewed as essential sources of information and expertise that positively augment the academic and research experience.

Roles extend beyond transactional relationships. Alumni recognition programs celebrate accomplishments that not only build or reinforce relationships, but also offer role models for graduates and students and raise the profile of the institution generally. Learning and educational programs reinforce the role of the UI as a source of continuing education both at the professional level or more broadly. These activities afford recurring opportunities for Iowa’s faculty to share their work with the public.
Throughout the committee’s work, one central theme resonated – our efforts should evolve with the life cycle of alumni and friends, responding and reacting to each individual constituent’s unique relationship with Iowa at any point in time. The most effective engagement occurs through targeted, personalized communications and activities that are meaningful and valuable to the individual and the university.

Developing unique relationships begins by structuring and implementing programs/activities that recognize and react to the preferences of alumni. Prevailing research reveals two frameworks useful in shaping such programs. The first recognizes that the needs, interest, and willingness to participate change as alumni age. The following figure illustrates this life cycle. Program planning and communications strategies tailored to those general characteristics will likely resonate.

At each of these life stages, however, there are discernible differences within the cohort that provide meaningful opportunities for more intense levels of engagement. Alumni range from disinterested to enthusiastic at any stage of life. An alumni engagement program should clearly respect these differences. The following pyramid illustrates the likely distribution.

To achieve success, world-class engagement requires the effort of alumni relations, development, and external relations professionals working together toward well-defined, strategic objectives. In addition, it requires that those charged with building constituent relationships also create a comprehensive university-wide network of faculty and staff who provide service, support, and consistently high levels of service to all of our constituents.
TO CAPITALIZE ON THE KEY CHARACTERISTICS OF WORLD-CLASS ENGAGEMENT AND TO ACCOMPLISH THE OBJECTIVES OF THE COMMITTEE, WE PROPOSE THE FOLLOWING RECOMMENDATIONS AS THE INITIAL COMPONENT PARTS OF A COMPREHENSIVE ADVANCEMENT PROGRAM:

PROGRAMMATIC ELEMENTS

Communications Strategy to Advance and Promote the UI and its Impact

A re-imagined communications strategy must be developed that exhibits a stronger singular voice to share the University of Iowa institutional story, including alumni engagement and philanthropic impact messages, with more constituents regardless of alumni status. UI strategic communications priorities should also be shared in targeted, highly coordinated and timely messages to alumni and friends through unit, departmental, and collegiate strategies.

Select Programming Recommendations:

- A university-wide magazine, available in print and digital formats, shared widely with our audience of students, alumni, and friends, which captures the essence of Iowa and shares compelling stories not just about our university and its people, but represents the university as the flagship across the state. The Iowa Alumni Magazine offers a well-established starting point for the development of such an institutional publication.
- A coordinated calendaring system to streamline the volume of communications to individual alumni and friend addresses, as well as a complementary system of support for unit-based messaging (e.g. UI monthly alumni emails listing all upcoming events for colleges/units).
- A social media campus network that is coordinated and customer-centric, valuing the content provided by our constituents, and connecting with them to determine their interests and affinities.

Enhanced Student Awareness and Education

Development of enthusiastic alumni is directly correlated with the quality of the student experience. While students are on campus, the university has the opportunity to capitalize on the qualities that create an engaged and loyal alumnus/alumna – high-quality academic programs, personal relationships with other students, faculty, and staff; value beyond the classroom experience; professional life preparedness; traditions; and campus life.

Select Programming Recommendations:

- Grow activity and awareness of student engagement and philanthropy groups that shape attitudes and train leaders.
- Capture and analyze student involvement data, which will be critical for long-term alumni efforts including targeted messaging and outreach.
- Coordinate student programs with the colleges to focus resources and messages to specific student audiences (graduate students, incoming freshmen, seniors, etc.), as well as those that align with alumni affinity organizations (e.g. Dance Marathon students).

Harnessing Alumni Career Expertise

Alumni contribute to the academic mission of the university and can aid the career success of Iowa students and their fellow alumni by sharing their career experiences. In doing so, the individual alumnus/a is afforded the opportunity to meaningfully interact with UI faculty and students by participating in classes, providing real-world experiences or case studies, supporting internship and mentoring initiatives, and expanding the impact of Iowa research and ideas.

Select Programming Recommendations:

- Engage alumni to expand professional experiences for students through job shadowing, internships, and employment opportunities.
- Establish a comprehensive plan for new and existing mentoring programs for students to connect with alumni who are aligned with their area of study and/or regional area. Central to the success of this initiative will be virtual tools to facilitate these important relationships.
- Encourage interested alumni to share their expertise in the academic environment and connect those individuals with the academic units.
- Connect alumni with university entrepreneurial and economic development entities to assist in their mission to commercialize university-derived intellectual property.
Enhanced Alumni and Donor Engagement

Regional Engagement

To complement the life cycle approach, a significant focus on regional engagement will also be employed. Recognizing that only 34 percent of Iowa’s alumni live in Iowa and fewer still will routinely visit Iowa City, it is imperative that the university regularly engage those alumni where they live. For those living in Iowa, it is equally important the university maintain a consistent presence across the state to develop and expand relationships with alumni and friends. In particular, high concentrations of alumni and key stakeholders in Des Moines and Chicago warrant intensive programs.

Select Programming Recommendations:

• Increase alumni engagement across the country in strategic metro areas, bring high quality university programs from campus to these targeted geographic regions, train and engage alumni volunteers with student recruiting/admissions activities and priorities, and establish regionally based early-career networking support for young alumni
• Coordinate college and unit regional activities with university-wide efforts, especially among cities with the largest alumni populations (e.g. Chicago)
• Create a seamless experience between alumni and donor engagement by involving regional development staff in alumni efforts
• Grow existing IOWA Club volunteerism and engagement activities by providing staff support, volunteer development opportunities, and a regular UI presence in strategic regions

Life-long Learning

Enhanced programs created and supported by university faculty and staff will continue the intellectual engagement of alumni and friends in Iowa and beyond. Exploration of virtual programming designed to reach Iowa constituents around the globe is seen as a growth opportunity for engagement.

Select Programming Recommendations:

• Seek greater coordination and leverage of the many lecture/presentation-based programs sponsored by university departments and colleges
• Support selective experimentation on video dissemination of this content to judge demand and the success of different marketing and presentation approaches
• Support an expansion of Senior College offerings on campus (and target classes for other Iowa metro areas) to reach more alumni and members of the broader community
• Examine the efficacy of family-based on-campus events to engage extended family members and recognize existing and potential UI legacy families (e.g., Legacy Weekends for grandparents and parents, sibling programming tied to recruitment)
• Capitalize on the tens of thousands of people committed to UI Health Care excellence with health care-focused outreach events that engage patients and their families
• Explore the relationships and opportunities deriving from educational and service travel (e.g., alternative spring break, the Magid Service Initiative, and Iowa Voyagers)
• Identify lifelong learners’ potential philanthropic interest in the UI and communicate with appropriate development staff
• Connect alumni with university entrepreneurial and economic development entities to assist in their mission to commercialize university-derived intellectual property
Athletic Activity Engagement

Although the need exists to better coordinate all external relations activities, a powerful opportunity is increased integration with the Department of Intercollegiate Athletics. Events and communications materials can be more streamlined with immediate benefit.

Select Programming Recommendations:

- Aid the evolution of the I-Club system to sustain university presence in desired areas across Iowa and utilize established volunteer networks while recognizing the needs of athletics to adjust their programming
- Coordinate alumni outreach and in-state I-Club events to capitalize on a broader university message as well as increased coordination of communications
- Identify opportunities to take athletics programming to key strategic metro markets outside of Iowa
- Continue to evolve existing programs at away games and post-season play
- Create the means to support athletics alumni engagement and devise mechanisms to connect graduating student athletes and alumni with the broader alumni base

Affinity Group Support

Alumni and friends’ relationships to the university are multi-faceted and extend beyond collegiate or academic programs. We should nurture these affinities with staff support to allow these university-based programs to flourish.

Select Programming Recommendations:

- Maintain and grow the organization, volunteers, programming and communications for existing alumni affinity organizations (e.g., Dance Marathon Alumni Group, Mighty Hawkeye Battalion Alumni Association, LGBTQ Affinity Group, Latino-Native American Alumni Alliance, and Alumni Band)
- Evaluate the expansion of alumni organizations based on student organizations
- Identify potential philanthropic interest in the UI and communicate with appropriate development staff

Corporate Engagement

A collaborative model of alumni engagement also aligns with a university industry relations component that coordinates the multitude of campus touchpoints with key and varied corporate partners. These include UI Foundation corporate relations staff, OVPR, Economic Development, unit-based corporate alliances (e.g. Rockwell/College of Engineering), and the Pomerantz Career Center as well as alumni engagement in identified corporations for alumni-employee events, hiring, internships, and philanthropy.

Select Programming Recommendations:

- Develop a recognition program for alumni-owned businesses, as well as a marketing initiative to encourage alumni and in-state businesses to hire UI student talent for internships and career positions
- Establish alumni events at the largest Iowa alumni employers, creating value for the corporation, our alumni, and the broader university relationship
- Develop a comprehensive plan for aggregated sponsorship opportunities (e.g. support for key alumni and student events, Hancher, etc.)
- Establish a centralized, enterprise-wide engagement database to organize and manage individual and corporate relationships
Enrichment of Data Capture and Analytics Efforts

A critical requirement for the success of any engagement model is the data infrastructure. A comprehensive alumni database currently exists; however, to drive long-term growth in our relationships with our alumni, fans, patients, donors, and friends, initiatives to capture and analyze data will rely on the following elements:

- Additional student data regarding extracurricular activities to understand affinities
- A flexible, responsive enterprise-wide constituent relationship management database
- The development of an engagement measurement regime and associated data capture systems
- Supplemented alumni and donor information
- A comprehensive data analytics department that can provide segmentation and predictive models across our advancement efforts
- In 2017, the UI Alumni Association and Office of Admissions launched a communications project to identify and begin interactions with children of alumni for which specific data was purchased from a third-party vendor. This project will offer key learning and experience with segmentation and targeted communications.

Alumni Recognition and Advocacy

University recognition of constituent achievements is a long-standing and valuable tool in relationship-building. We must align and celebrate high-quality award recognition programs at the university level as well as in colleges, departments, and through institutional alumni relations to honor the professional and public service and achievements of our alumni and friends.

To amplify the university’s message, we can harness the voices of 270,000 alumni through a structure that informs and mobilizes alumni to serve as advocates for the university within their organizations and with key external audiences (e.g. media, government, industry/educational organizations). Related, there are opportunities to enhance Iowa’s existing statewide outreach, providing in-state alumni another engagement portal.

A PATH TO IMPLEMENTATION

To implement these proposed initiatives and to inform the evolution of this work, the committee seeks the support of the University of Iowa President in the development of an operational framework. Critical to the framework will be a review of the financial model. In particular, the committee unanimously agreed that further discussion of the replacement of a dues-based alumni model with a goal of eliminating it would be a vital first step in reaching more alumni.

The next step on the path will be to define strategic and operational plans for alumni engagement. Greater involvement, coordination, and operational execution with campus partners will enhance this work. As this implementation evolves, a thorough internal and external communications plan will be required, along with a commitment from the university’s leadership. We believe this advancement initiative will result in a profoundly different alumni experience for Iowa.
APPENDIX: ADVANCEMENT COLLABORATION COMMITTEE ACTIVITIES

<table>
<thead>
<tr>
<th>Date</th>
<th>Activity</th>
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<tbody>
<tr>
<td>July 2016</td>
<td>Formation of Advancement Committee</td>
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<tr>
<td>July 2016 - February 2017</td>
<td>Bi-weekly Meetings of Staff Committee</td>
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<tr>
<td>November 2016 – February 2017</td>
<td>Bi-Weekly Meetings of Staff/Volunteers</td>
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<tr>
<td>November 9, 2016</td>
<td>Council of Dean’s Meeting (Marshall, Kueter)</td>
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<tr>
<td>December 20, 2016</td>
<td>Dean’s Subgroup (Robillard, Gardial, Clay, Letendre, and Snetselaar)</td>
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<tr>
<td>January 4, 2017</td>
<td>Dean’s Subgroup (Robillard, Gardial, Clay, Letendre, and Snetselaar)</td>
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<tr>
<td>January 18, 2017</td>
<td>Athletics’ Subgroup (Barta and Henderson)</td>
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<tr>
<td>January 20, 2017</td>
<td>Communications Subgroup (Marshall, Kueter, Kahler, Larson, Schmidt, Howe, Thomas-Lewis)</td>
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<tr>
<td>February 27, 2017</td>
<td>University Office of Strategic Communication (Matthes, Beck, Gage)</td>
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UNIVERSITY OF IOWA STRATEGIC PLAN

Philanthropic support for faculty and research advancement:
A total of $200 million in FY17-FY21

External philanthropy in support of student success:
A total of $200 million in FY17-FY21

Annual percentage of alumni supporting the University of Iowa through philanthropy: 15%

GRAPHICS PRODUCED BY DEAN SARAH GARDIAL WITH INPUT FROM THE DEAN’S SUBGROUP

- Within their organizations
- With IJ Leadership
- With legislators, S1R
- Recruiting students for IJ
- Networking us to other potential college supporters.

- Strategic planning
- Curriculum and program planning
- Classroom support, data, speakers, projects, cases
- Student organization support
- Community engagement
- Intelligence on industry trends
- Standing board for innovative initiatives
- Lecturers

- Access to industry expertise, data and financial support
- Insight into real-time problems
- Public-private partnerships
- Community engagement

- Scholarships
- Job shadowing internships
- Full time jobs
- Mentoring

- Annual giving
- Targeted initiatives fund-raising
- Major gifts

Alumni Benefits:
Personal fulfillment, access to talent/hiring, pride, giving back, networking, learning, enhancing the campus/college reputation
ALUMNI WHAT'S NEXT

**LIFE CYCLE**

**STUDENTS**

- Assist in local or hometown recruiting events
- Customized program and communications efforts for recent graduates, a critical step in the relationship. The alumni experience is the student experience, so we must be purposeful in our work with students to establish lifelong relationships.

**RECENT GRADUATES**

- Develop a strong, consistent branding platform
- Increase social media and other digital communications efforts (customized to life cycle stage – e.g. Snapchat for students, Facebook for retirees)
- Create a university-wide magazine (print and digital) (Curated stories that share college, unit, and development messages in addition to human interest stories)
- Coordinate marketing and advertising through paid, earned, and owned media opportunities
- Segment messages by affinity (colleges, athletics, etc.) and vehicle (social media, email, etc.)
- Coordinate communications calendars and segmentation to reduce the volume of mail/email sent to alumni and friends

**EARLY CAREER/ FIRST MORTGAGE**

- Lifelong learning programming specific to young professionals (finance and first mortgage, career planning/change, etc.)
- Early career programming, support, and networking
- Custom regional programming, new city orientation, young professionals network, coaches for recent graduates

**MID CAREER & FAMILY**

- Develop a robust, collaborative regional program effort (finance and first mortgage, career planning/change, etc.)
- A more robust, collaborative regional program effort (e.g. health care)

**LATE CAREER/ EMPTY NEST**

- For alumni later in their careers, communications and programming that engage members of his or her family and often require little time commitment.
- As our relationship with the early career alumni evolves, providing value to their career objectives become the higher priority.

**RETIREE**

- For long-tenured Iowa alumni, communications and programming that share their experiences, connect with today’s students, and capstone on nostalgia will affirm their relationship with the university.

LEADERSHIP VOLUNTEER OPPORTUNITIES

- Online and in-person lifelong learning initiatives (content specific to an aging population – e.g. health care)
- Establish a comprehensive Mentor Program to connect past and current students (Virtual and in-person, customized to shared interests, areas of study)
- Engage alumni and friends in volunteering opportunities

**SUPPORT**

- Increased segmentation of solicitations based on affinity (applied analytics)
- Major and Planned Giving Solicitation Strategies
- Create Donor Delight - World-class stewardship for donors at all levels

**AWARDEES**

- Robust "Phil" programming to share the role of philanthropy in that student experience
- Recent Grad-specific solicitation strategies that focus on select project-based efforts

**ENGAGEMENT**

- Engage with alumni to expand professional student experiences (internship, job shadow, mentorships)
- Develop awareness with Pomerantz Career Center
- Alumni Relations coordination with Pomerantz Career Center
- Custom regional programming, new city orientation, young professionals network, coaches for recent graduates
- Alumni Engagement: Sibling Programming

**SUBJECT TO CHANGE**

- For those individuals whose relationships with the university are defined by a nontraditional experience, customized, segment-specific engagement efforts with exceptional customer service set a stronger brand. Further, it is critical for communications to be segmented and tailored to specific interest (e.g. students, alumni, friends).