




ALUMNI LEADER'S CONFERENCE

Advancement and Membership

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Topics for Today

- "Advancement" at Ohio State
- Membership Best Practices and Tips
- Q & A

*Please ask questions through-out presentation



What is Advancement?


The strategic, university-wide integration and coordination of alumni relations, communications and marketing, and development functions to foster positive relationships with students, alumni, and other key audiences, provide multiple opportunities for engagement, and generate involvement with and support for the mission of The Ohio State University.

"What I see as the biggest benefit of this is the far deeper involvement that we'll enjoy with the entire Ohio State family." - **OSU Trustee Douglas Borrer**



Why is Advancement Important to Ohio State?


- Funding
- Less confusion
- Become more efficient and effective
- Develop more, deeper, and stronger relationships with alumni and friends



Advancement Objectives

1. Become America's #1 public university in total private support by 2020.
2. Raise \$2.5 billion from a comprehensive fund-raising campaign.
3. Increase the number of annual donors to 240,000.
4. Earn a very satisfied rating from 50% of alumni for providing opportunities to be or stay involved with the university.
5. Demonstrate yearly increases in the number of volunteers actively serving Ohio State.
6. Expand the number of national leaders who award high marks to Ohio State (from 39% to 50% in awareness and from 24% to 40% in very favorable ratings).
7. More than triple the number of advocates and ambassadors who are equipped and motivated to reinforce key university accomplishments and attributes (from an estimated less than 10% to 35%).
8. Double the number of Ohioans who feel a strong connection to the university (from 22% to 44% who report a very strong bond).


NOTE: All objectives, except for #1, are to be realized by the end of the 2015-2016 fiscal year.



Advancement Objectives

Engagement!!!

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5. Demonstrate yearly increases in the number of volunteers actively serving Ohio State.



What does Advancement mean to you and your group?


- What can you do as a leader of a Club or Society do to help achieve these objectives?
- What can your Club or Society do?
- How can OSUAA and OSU help you?



Advancement Objectives

“If we manage this the way our team is talking about, then the result is the overall increased satisfaction of all of these groups of our friends, and the monetary goals almost become secondary. If we embrace this and put it together correctly, we’ll soar past any monetary goals we set up.”

- OSU Board of Trustee Douglas Borrer



Membership Program Essentials

Strategy and Planning

- Clearly DEFINE and STATE the purpose of your organization’s membership
 - In 20 words or less tell someone what you your membership program does
 - Every activity should link back to that purpose
 - Strategy doesn’t have to be membership, engagement or awareness is a strategy as well
 - Need to align with goals of Ohio State’s goals as well
- Performance Goals
 - Important to openly state specific performance goals for members
- Examples:
 - Raise funds to offer five (5) \$1000 scholarships to county residents attending OSU
 - Maintain active membership base of 200 dues paying members



Membership Program Essentials

Operational!


- Information Sharing
 - Shared roster
 - Financial information
 - 65% of all membership dues goes to scholarship
 - 35% goes to fund operations (game watches, senior send off, etc.)
- Unsuccessful activities can be a success
 - Entrepreneurial Spirit
 - Ensure that the worst case scenario doesn't bring "bad press"
- What tools are available?
 - Don't use something because it is there, have a plan
 - Use other local alumni association clubs as a resource
 - OSUAA reps share membership information across universities
 - Not competitors, we are all trying to advance our respective institutions



Membership Program Essentials

Data and Financial!

- Information back-up and security
 - Portable storage devices seem like a great idea, until it gets lost
 - PCI compliance
 - Tax reporting
- Annual report is not sufficient control on membership dues or other revenues
 - Need multiple check points of ownership
 - Same person should not be authorizing purchases, writing checks, balancing checking account and providing annual review to membership
 - Break up these tasks across multiple people
- Risk mitigation is a point that can't be emphasized enough



Feedback and Questions
