

# AD HOC COMMITTEE ON ALUMNI RELATIONS



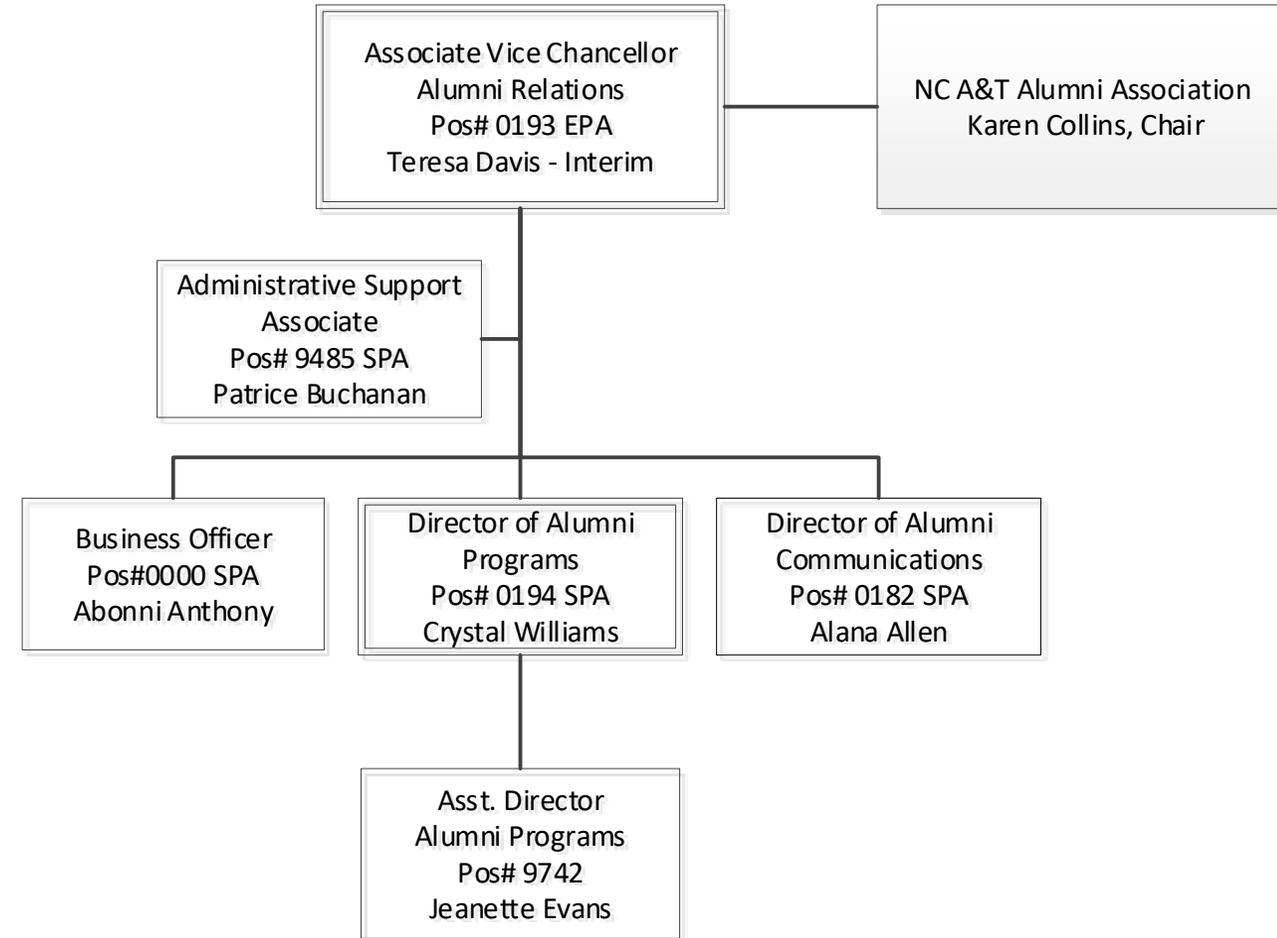
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Vice Chancellor, University Advancement  
April, 24, 2020

# BACKGROUND

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- The number of financially independent, separately incorporated alumni associations has steadily decreased over recent decades.
- The reasons are many:
  - Declining desire for paid membership among more recent alumni;
  - Competition from online platforms;
  - Financial pressures;
  - Waning affinity partnership revenues;
  - Lateral competition from other nonprofits;
  - and generational changes in attitudes toward organizations (value proposition)
- As a result, many of these independent alumni organizations have integrated their work with their institution's fundraising structure.
- There are three primary drivers of closer ties or formal integration:
  - **Organic change** - They recognize that mission, mechanisms, and audience largely overlap between the two organizations.
  - **Desire for greater effectiveness** - More than ever, institutional leaders expect proof of results from alumni communities.
  - **Desire for greater efficiency** - Organizations can contain costs by consolidating backbone business functions (e.g., human resources, facilities management, IT, finance).

- NC A&T State University was no different and made the decision to implement an integrated model.
  - The University has an Alumni Relations team
    - All state employees reporting to University Advancement
    - Operations are funded by NC A&T
  - NCAT Alumni Association is a separate 501(c)3 organization
    - Has a Board of Directors with fiduciary and governance responsibility
    - Maintains its own assets and funds its own operations
    - Has no staff – all Association activities supported by University Alumni Relations team
  - Associate Vice Chancellor for Alumni relations also serves as Executive Director of the Alumni Association



- Goals for the NC A&T State University Alumni Association
  - Implement a plan to satisfy the convention debt to the University in no less than four years.
  - Implement a financial model for sustainability of the National Alumni Scholars or revise the purpose of the program in light of the needs for student success.
  - Identify and implement the role of the board, the structure of committees, and the conduct of meetings for efficiency and effectiveness.
  - Finalize a refreshed strategic plan for the Association.
  - Identify at least two new programs for alumni engagement with a timeline for implementation.
- University agreed to pay for consulting firm with experience in alumni relations, development, and integrated models to conduct a review and lead the group through a strategic plan refresh exercise.
- Through RFP process, we selected Alexander Haas
  - Familiar with the University
  - Expertise in the required area
  - John Taylor, Senior Partner conducted the review and produced the report
  - Report was delivered in March 2020

# PROCESS

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- Initial approach recommended by John Taylor
  - Initial assessment of the workings/interactions of Alumni Relations and the Alumni Association
  - **S**trengths **O**pportunities **A**spirations **R**esults Assessment with both groups separately and then combined
  - Team retreat with all parties to create a multi-year strategic plan to be agreed upon by Alumni Relations, Alumni Association, and University Advancement
- In February, John Taylor conducted interviews with:
  - Alumni Relations team
  - Advancement Leadership Team
  - Chancellor Martin
  - Two Alumni Association Board members, including follow up call with Karen Collins, Chair
- John identified two obstacles to completing the assessment as initially proposed:
  - Some of the goals had not been fully developed by the Association, compounded by an ongoing lack of understanding of the integrated model by the board.
  - The working relationship between the Alumni Relations team and the Alumni Association board leadership was acrimonious at best.

- Based upon that initial work, John Taylor met with Ken Sigmon and proposed a modified approach, to which we all agreed.
- Interviews were expanded to include:
  - All Alumni Association Board members
  - Select members of the Board of Trustees
  - Former Alumni Association Board members
  - Select Alumni Chapter Presidents
- Conclusion of this phase of the engagement would be:
  - Summary report of findings and observations
  - Recommendations for potential paths forward
- John concluded his work and delivered his final report in March
- After reviewing the report, The chancellor asked for an ad hoc committee to review the report and make a recommendation for a path forward.
  - Diverse group representing many perspectives

# KEY OBSERVATIONS



- There exists an unhealthy amount of animosity between Alumni Relations and the Alumni Association attributed to:
  - Lack of agreement and understanding regarding respective roles and responsibilities;
  - Ineffective communications;
  - Lack of clarity and agreement regarding the optimum nature of an integrated model;
  - Lack of trust between the two groups;
  - Lingering issues related to the planned Alumni Convention.
- Disagreement between Alumni Association Board members as to mission and tactics necessary to further that mission.
  - Activities and events
  - Fundraising versus friend raising
  - Communications
  - Directing activities of Alumni Relations
- Disagreement regarding the Alumni Association's role as a working board or a governing board.
- Uncertainty on the role and intersection between the Alumni Chapters and the Alumni Association.
  - Lack of interaction with, and oversight of, chapter activities and finances
- Complaints by board members about the general operations of the Alumni Association Board's functions and processes
  - Lack of communication internally and to Alumni Chapters
  - Timing and irregularity of board meetings, as well as lack of substance in meetings

# RECOMMENDATIONS

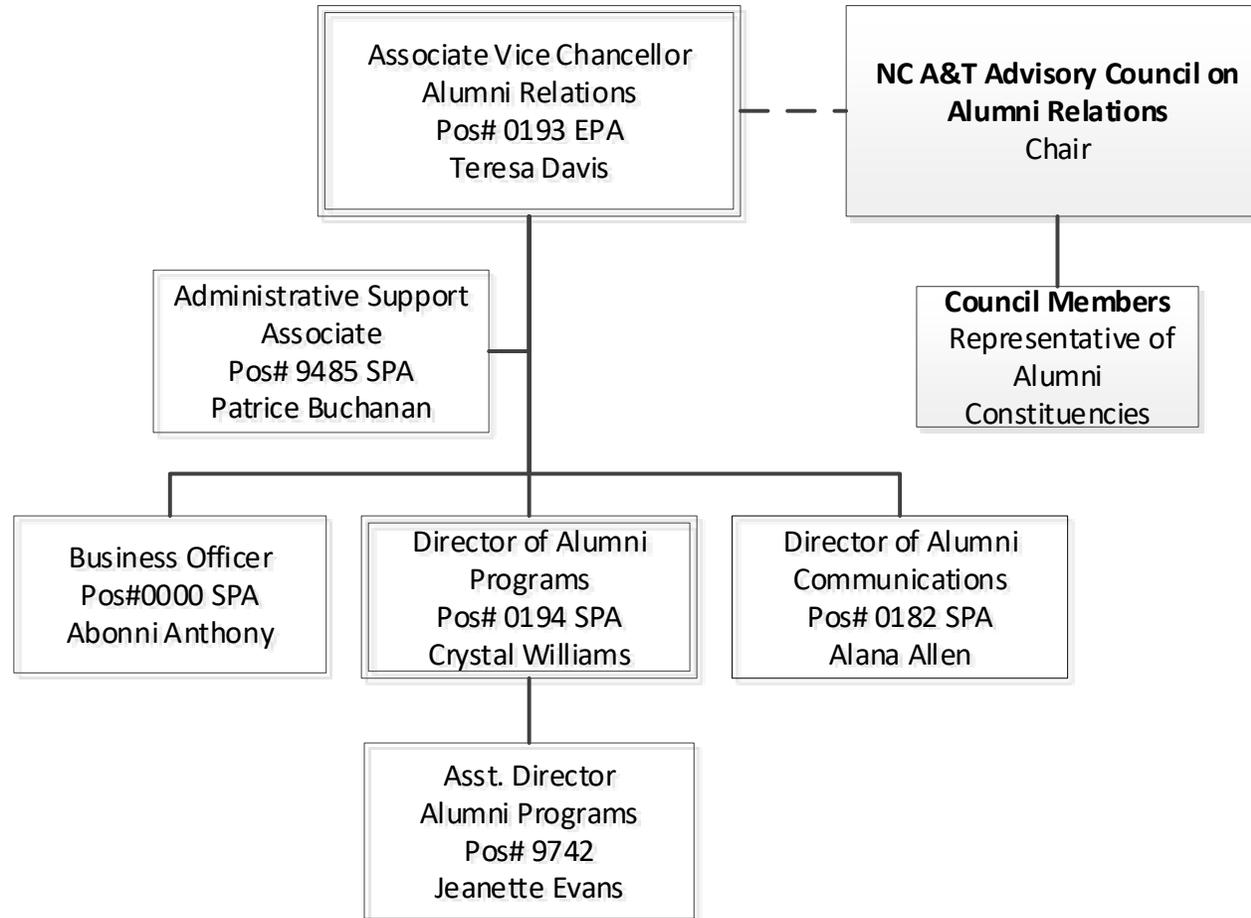


- **Do nothing**
  - Stick with the status quo
- **Obtain additional organizational development help**
  - If status quo is the chosen route, consider an organizational development consulting firm to address the issues
- **Rebuild the Alumni Association Board**
  - If the path forward under the current structure is desired, the best course of action may be to start over from scratch with a new set of Alumni Association Board members
  - At the same time, give consideration to the structure, including committees, number of board members, and specific roles and responsibilities and their direct engagement with Alumni Chapters
- **Clearly define and document roles and responsibilities**
  - Ensure everyone clearly understands their roles and responsibilities under guiding principles established by University leadership
  - Recalibrate operating agreement to specifically address the issues that have surfaced
- **Replace the Alumni Association with an Alumni Relations Commission**
  - Create a more direct link to Alumni Chapters for growth, oversight, and activities
- **Eliminate the Alumni Association**
  - There is little that the Association does that could not be easily absorbed by Alumni Relations
  - Cost savings that could fund new activities

# COMMITTEE FEEDBACK OVERVIEW



- Clear that feedback indicates the status quo is not an option!
- Also clear that the status quo, even with additional organizational development or leadership development is not an option.
  - Dollars spent on trying to maintain the status quo could be better spent on programming.
- Some thoughts to considerations that must be addressed if the current structure were to be retained but replace the board members.
  - Roles and responsibilities and relationship between Alumni Relations and Alumni Association
  - Size and structure
  - Succession planning/board member progression
  - Role of chapters
  - Strategic planning
  - Board member accountability
  - Prior service at chapter level
- Unanimous that roles and responsibilities need to be clearly defined, no matter what structure is adopted.
- A great deal of support for replacing the current Alumni Association with an Alumni Relations Commission or Council.
  - Could be structured to ensure all constituencies are represented
  - Additional staff could be required
- Support for elimination of Alumni Association
  - Would still need an advisory group to work with Office of Alumni Relations



- More direct lines of communication, support, and programming to our Alumni chapters and alumni in general.
  - Direct link to University leadership for consistency and clarity of purpose, expectations, and outcomes.
- Remove confusion on roles and responsibilities of integrated model.
  - Alumni Association vs. Alumni Relations
- Cost savings to support more programming for chapters and alumni
  - Reduction in costs from operating a separate organization – audits, travel, meetings, etc.
  - Applied to additional programming staff or direct programs for alumni
- Allows staff to focus on delivering support to alumni without distraction of running a separate organization
- Welcomes all alumni into the Aggie Family.

# NEXT STEPS



- **Provide formal recommendation to the Chancellor.**
  - Memo from Committee Chair delivered on Thursday, April 23, 2020.
- **Inform the Alumni Association Board chair and members of outcome.**
  - Formal notification from the Chancellor delivered on Friday, April 24, 2020.
- **Inform the Board of Trustees.**
  - Agenda item for meeting on April 24, 2020.
- **Issue notification to Alumni chapter Presidents during Board of Trustees meeting.**
  - Delivered on April 24, 2020.
- **Conduct town hall meeting with Alumni Chapter Presidents as soon as possible.**
  - Afternoon of April 24, 2020.

# QUESTIONS/COMMENTS?

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