



# ALUMNI ENGAGEMENT

FIVE-YEAR STRATEGIC PLAN | 2018–2022

## FROM THE PRESIDENT

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No matter how long ago you graduated or how distant you are from our campuses, my hope is for all of you to think of Pepperdine as your second family and home away from home.

We sincerely desire a lifelong relationship with each of you and want you to feel connected with your alma mater and Pepperdine family no matter where you find yourself in life. I envision our family as a global one who assures its members that they always have Pepperdine's support, prayers, and respect.

When I talk to alumni about “giving back” to alma mater, the conversation is always in the context of supporting Pepperdine’s mission to strengthen lives for purpose, service, and leadership. I trust each of you has benefited from this mission—and our emphasis on integrating faith and reason—as part of your student experience. I expect your Pepperdine education to provide you with a foundation to serve compassionately and change lives in both your own families and the communities where you work and live.

Because you are family, I am committed to ensuring that Pepperdine “gives back” to you, too, by finding meaningful ways for you to strengthen your bond with alma mater. I believe we can do better in creating opportunities to enrich your lives and for you to enrich the lives of our current students and your fellow alumni alike, which is why I have commissioned my Pepperdine colleagues to develop this Alumni Engagement Strategic Plan. It is a University-wide blueprint that calls for a mutual commitment between school and alumni, executed in a more purposeful way than ever before. With it, we will strengthen a sense of community as Waves and our ownership of alma mater.

I look forward to partnering with you in this process.

Sincerely,

A handwritten signature in black ink that reads "Andrew K. Benton". The signature is written in a cursive, flowing style.

Andrew K. Benton  
President and CEO

# BUILDING VALUABLE LIFELONG RELATIONSHIPS

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Alumni live at the heart of every institution of higher learning, serving as a critical bond between a university's academic community and the world in which it prepares its students to lead.

As the landscape of higher education continues to evolve, alumni have become a fundamental part of a university's brand experience, assuming roles as loyal advocates, ambassadors, and mentors who actively contribute to the way people think, feel, and act toward a university and the communities it serves.

Today, a university's relationship with its alumni is more important than ever. Universities are renewing their commitment to graduates—developing new ways to support their careers and well-being throughout their lifetime—and in return alumni continue to positively share their alma mater's story, support it financially and with their skills and experience, and engage with current and future students.

As a Christian university, we care deeply about each of our alumni, and we recognize that the University's future, and its ability to enrich lives and improve communities around the world, depends upon the development of meaningful, lifelong relationships with our 120,000+ alumni. As we cultivate new resources for the University, innovate within a faith-based learning experience, and equip students to begin their careers after graduation, alumni support is essential to achieving our shared aspirations. Recognizing the importance of these relationships, we seek to add value to the lives of alumni, and we are committed to doing so in a way that is fresh, substantive, and energizing in its approach.

The premise of Pepperdine's first University-wide Alumni Engagement Strategic Plan is grounded on a value proposition that provides mutual benefit to alumni and alma mater. Over the next five years, the University will use this plan to vigorously strengthen its relationships with alumni while pursuing a path that not only advances our strategic objectives but empowers the personal and professional growth of alumni around the globe.

This is the beginning of a new journey together. We hope you'll join us every step of the way.



# STRATEGIC PLAN AND PROCESS

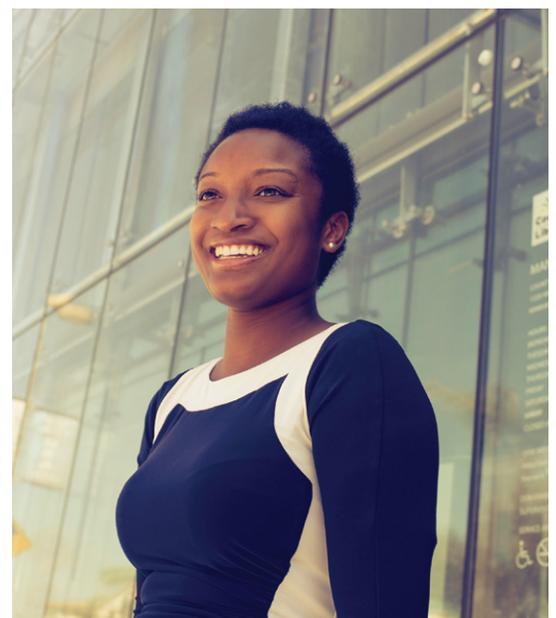
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The Alumni Engagement Strategic Plan is the shared work of key stakeholders across all five schools and the product of research and discussions stretching over five months. The foundation for the plan is goal three of the University's strategic plan, "Pepperdine 2020: Boundless Horizons:" *to build meaningful community and enduring alumni loyalty.*

The planning process started in March 2017 and was facilitated by consulting firm Grenzebach, Glier & Associates (GG+A). With more than 40 years of alumni relations experience, GG+A consultants provided an expansive framework for the planning process along with an invaluable perspective on industry trends. As part of this process, 21 interviews with deans, the president, senior administrators, and the co-chairs of the Alumni Leadership Council (ALC) were conducted. The co-chairs, representing each of the five schools, then led ALC in ongoing investigations and discussions around strategic alumni engagement initiatives.

A Strategic Planning Steering Committee was organized with representatives from nine key stakeholder groups. The committee provided more than 60 historical planning documents and conducted 14 focus group conversations comprising 92 alumni, students, faculty, staff, parents, administrators, and regents. The committee and all the participants in the planning process have provided Pepperdine with a comprehensive, focused roadmap that will guide University-wide engagement with alumni for the next five years.



# FOUNDATION

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## VISION

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A caring community that fosters loyalty, goodwill, and excellence in alumni and alma mater

## MISSION

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To engage alumni in a mutually beneficial partnership that generates meaningful connections and strengthens the Pepperdine community

## VALUES

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» **PURPOSE**

*A lifelong pursuit of faith and reason*

» **CHARACTER**

*Strengthening relationships through honesty, integrity, and ethical conduct*

» **GRATITUDE**

*Being thankful for the relationship and learning gained through Pepperdine*

» **OWNERSHIP**

*Taking greater responsibility for the future progress of Pepperdine*

» **INNOVATION**

*Seeking new ideas and methods to better engage the Pepperdine community*



# MEASURES OF SUCCESS

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Alumni Relations is a service-oriented enterprise, striving to deliver quality services to students and alumni. In the future, measurements for success will be based on defined outcomes, especially those that illustrate added value and demonstrate the meaningful changes that Alumni Relations is making in the lives of Pepperdine alumni.

Historically, outcomes have been difficult to measure because they are often abstract, subjective, and complex. Instead, the University has actively measured alumni engagement activities, which provide tangible and countable metrics and meaningful indicators of the impact we are having on alumni. Activity tracking has also helped us demonstrate accountability and progress toward key benchmarks and goals set for departmental initiatives.

Over the next five years, the University will begin to define success measurements through three key performance indicators (KPI) based on participation, volunteerism, and donations:

» **PARTICIPATION**

*Increasing annual alumni event participation by five percent*

» **VOLUNTEERISM**

*Increasing the annual number of volunteers and hours by five percent*

» **DONATIONS**

*Increasing the annual number of alumni donors and dollars by five percent*

KPI measurements will be reviewed annually and adjusted in accordance with changes in budgets and staff resource allocations.



# GOALS, STRATEGIES, AND TACTICS

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Three strategic goals—our biggest ideas shaped by our highest-priority outcomes—will be measured through a defined set of quantitative and qualitative assessments for the next five years.

A series of strategies will support each goal, addressing how the University will measure success and serving as an implementation guide to a prescribed set of tactics. Tactical execution will be contingent upon available budgets and resources each fiscal year, especially as the University determines the best method for allocating staff and resources to more effectively and efficiently engage alumni.

The University will review strategies and tactics supporting each goal annually, assess and report KPI measurements, and determine when strategic goals should be adjusted or expanded.



# GOAL 1

Cultivate a vibrant and robust community that engages alumni purposefully, personally, and professionally.

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## Develop and scale customized online alumni engagement opportunities.

- » Select and implement an online community portal that better serves the interests of our alumni. **FY18**
- » Implement a new event management solution to more effectively plan and capture attendee information. **FY18**

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## Expand professional development programs and services.

- » Seamlessly integrate job, internship, and mentoring programs from career and volunteer centers into an online community portal. **FY19**
- » Define, develop, and communicate professional development and career programs for alumni. **FY19**
- » Facilitate alumni gathering at industry-specific events. **FY18**

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## Aggregate, cultivate, and promote continuing education and lifelong learning for alumni.

- » Identify, classify, create, and promote education and professional development offerings across Pepperdine, including spiritual and service-oriented programs. **FY20**
- » Develop and promote lifelong learning programs with content based on alumni needs through different life stages. **FY20**

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## Enable more effective networking event opportunities.

- » Provide options for alumni to connect pre- and post-event. **FY19**
- » Develop methods to increase networking effectiveness and alumni satisfaction. **FY19**
- » Plan lifelong learning events with faculty and leaders in specific regions. **FY20**

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## Engage and promote alumni leaders.

- » Improve methods to identify, mobilize, and train new leaders. **FY19**
- » Increase the number of alumni leaders and their responsibilities. **FY18**
- » Create a regional ambassador program. **FY19**

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## Develop methods and processes to recognize alumni annually for matters beyond financial giving.

- » Develop and implement recognition programs. **FY18**

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## Provide more effective methods to communicate with alumni and engage them in a true dialogue.

- » Develop and implement University standards and best practices for all forms of alumni communication. **FY19**
- » Explore and implement innovative communication outreach methods for alumni engagement. **FY19**
- » Evaluate and integrate email messaging for all alumni communications where practical. **FY19**
- » Optimize email communications around alumni interests and preferences. **FY19**

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## Create a strong partnership between alumni offices and school career centers to leverage alumni relationships.

- » Formalize the process by which alumni relations shares alumni contacts for student career support. **FY19**
- » Develop processes to identify and communicate job and internship opportunities. **FY19**
- » Revisit the HIRE Pepperdine campaign and agree to common language, call-to-action options, and follow-up methodologies to track and maximize alumni career services. **FY19**

# GOAL 2

Prepare students to become engaged alumni.

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## Communicate with students on what it means to be an engaged alumnus.

- » Define the characteristics of a model alumnus. **FY20**
- » Create and deliver messaging around the “Pepperdine Waves Family” identity throughout the student experience. **FY20**
- » Create and deliver messaging that fosters a culture of giving identity. **FY19**

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## Develop opportunities around major student milestones.

- » Define major milestones and opportunities where alumni can engage with students. **FY19**
- » Define opportunities where alumni can engage with students through the online community portal. **FY19**

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## Improve and expand opportunities for student-alumni mentorship.

- » Share and use mentorship best practices among the five schools. **FY19**
- » Integrate and extend current programs into the online alumni community portal. **FY19**

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## Build bridges between student affinity groups and related alumni groups.

- » Create a standard taxonomy to describe and classify groups. **FY18**
- » Use standard taxonomy to update websites and communicate affinity group opportunities. **FY19**
- » Build a self-service community portal to create and manage unlimited affinity groups. **FY19**
- » Recruit affinity group leaders to join in the community portal and build a vibrant membership. **FY19**

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## Involve students in alumni communications and events.

- » Create policies and processes for including students in alumni communications and event programs. **FY20**



# GOAL 3

Adopt industry-wide standards and best practices, coordinated across the University, to improve the measurements for alumni engagement and satisfaction.



## Establish University key performance indicators following emerging CASE industry standards.

- » Use KPI measurements University-wide to assess and advance the effectiveness of all alumni engagement programs. **FY18**

## Develop correlations between engagement behaviors and philanthropic support.

- » Develop and implement an alumni engagement scoring system. **FY20**
- » Develop and deploy dashboards. **FY19**

## Standardize data definitions, collection processes, management, and reports.

- » Define and implement standardized processes to collect and monitor KPI data. **FY18**
- » Develop standards for maintaining the quality of alumni constituent data. **FY18**

## Use predictive modeling for analyzing alumni engagement.

- » Select and use one predictive modeling tool that connects easily with important University data resources. **FY19**
- » Develop predictive models and dashboards. **FY20**



# STRATEGIC PLANNING STEERING COMMITTEE

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**AMY ADAMS** '02, MBA '08

*Executive Director, Career Services*  
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**GG+A**

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*Senior Vice President and Managing Director*  
Grenzebach, Glier & Associates

**ANDY SHAINDLIN**

*Vice President*  
Grenzebach, Glier & Associates



## OUR MISSION

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Pepperdine is a Christian university committed to the highest standards of academic excellence and Christian values, where students are strengthened for lives of purpose, service, and leadership.