



ALUMNI ENGAGEMENT

FIVE-YEAR STRATEGIC PLAN | 2018–2022

BUILDING VALUABLE LIFELONG RELATIONSHIPS



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 that 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 lifetimes—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.

At Pepperdine University, we care deeply about each of our alumni and 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 the 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 University'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 Waves 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 PLANNING PROCESS

Rooted in goal three—to build meaningful community and enduring alumni loyalty—of the University's strategic plan, "Pepperdine 2020: Boundless Horizons," 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.

Beginning in March 2017, the planning process was facilitated by philanthropy management consulting firm Grenzebach, Glier, and 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, GG+A conducted 21 interviews with deans, the president, senior administrators, and the co-chairs of the Alumni Leadership Council (ALC). 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 GG+A with more than 60 historical planning documents and conducted 14 focus group conversations comprising 92 alumni, students, faculty, staff, parents, administrators, and regents. The committee's efforts, along with GG+A 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



VISION

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

MISSION

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

VALUES

» RESPECT

Valuing other points of view and one another

» CHARACTER

Strengthening relationships through honesty, integrity, and ethical conduct

» GRATITUDE

Being thankful for the relationships 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

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 alumni time, talent, and treasure:

» **TIME**

Increasing the annual number of alumni event participation by five percent

» **TALENT**

Increasing the annual number of alumni volunteer hours by five percent

» **TREASURE**

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.



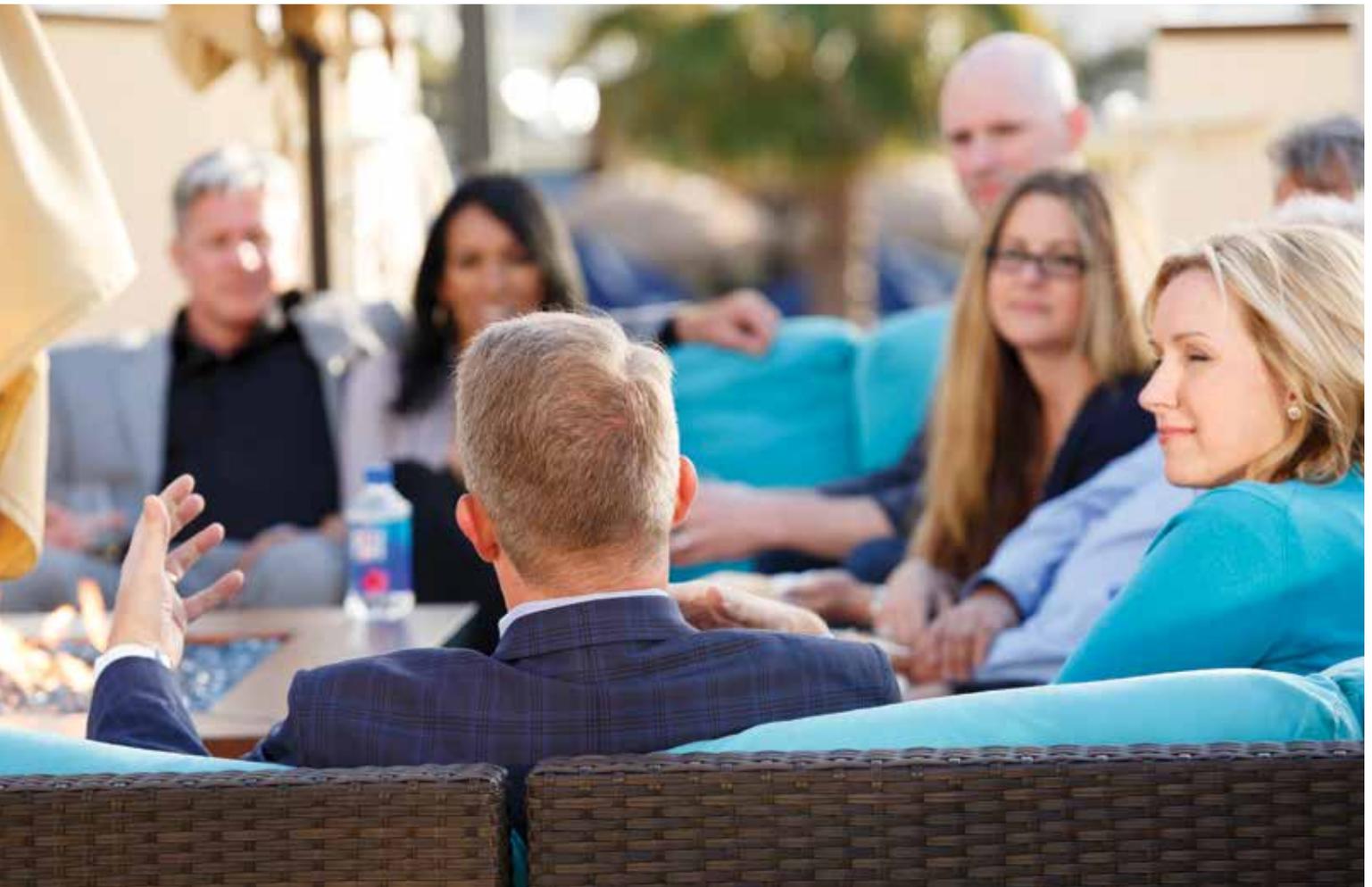
GOALS, STRATEGIES, AND TACTICS



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 at least 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.

Develop and scale customized online alumni engagement opportunities.

- » Select and implement an online community portal. **FY18**
- » Implement a new event management solution to more effectively plan and capture attendee information. **FY18**

Expand professional development programs.

- » Seamlessly integrate job, internship, and mentoring programs from career and volunteer centers into an integrated portal. **FY18-19**
- » Define, develop, and communicate professional development and career programs for alumni. **FY18-19**
- » Facilitate alumni gathering at industry-specific events. **FY18-22**

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. **FY18-22**
- » Develop and promote lifelong learning programs with content based on alumni needs through different life stages. **FY19-22**

Enable more effective networking event opportunities.

- » Provide options for alumni to connect pre- and post-event. **FY18-22**
- » Develop methods to increase networking effectiveness and alumni satisfaction. **FY19-22**
- » Plan lifelong learning programs with faculty and leaders in specific regions. **FY19-22**

Engage and promote current and future alumni leaders.

- » Improve methods to identify, mobilize, and train new leaders. **FY18-22**
- » Increase the number of alumni leaders and their responsibilities. **FY18-22**
- » Create a regional ambassador program. **FY18**

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

- » Develop and implement recognition programs. **FY19-22**

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 communication. **FY19-22**
- » Explore and implement innovative outreach methods for alumni engagement. **FY18-22**
- » Evaluate and integrate email messaging for all alumni communications where practical. **FY18-19**
- » Optimize email communications around alumni interests and preferences. **FY19-22**

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. **FY18**
- » Develop processes to identify and communicate job and internship opportunities. **FY18**
- » Revisit HIRE Pepperdine campaign and agree to common language, call-to-action options, and follow-up methodologies to track and maximize alumni services. **FY18**

GOAL 2

Prepare students to become engaged alumni.

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

- » Define the characteristics of a model alumnus. **FY18**
- » Create and deliver messaging around the 'Pepperdine Waves Family' identity throughout the student experience. **FY18-22**
- » Create and deliver messaging that fosters a culture of giving identity. **FY18-22**

Develop programming around major student milestones.

- » Define major milestones and opportunities where alumni can engage with students at events. **FY18-22**
- » Define major milestones and opportunities where alumni can engage with students through the community portal. **FY19-22**

Improve and expand opportunities for student-alumni mentorship.

- » Share and use best practices among the five schools. **FY18**
- » Integrate and extend current programs on the community portal. **FY19-22**

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. **FY19-22**
- » 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. **FY19-22**

Involve students in alumni communications and events.

- » Create policies and processes for including students in alumni communications and event programs. **FY19**
- » Define and create a process for recent graduates to retain the data in their student email accounts. **FY18**



GOAL 3

Use University-wide standards and best practices 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 effectiveness of all alumni engagement programs. **FY18-22**

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

- » Define and implement standardized processes. **FY18**
- » Form a data governance committee to set standards for maintaining the quality of constituent data. **FY18**

Develop correlations between engagement behaviors and philanthropic support.

- » Develop and implement a scoring system. **FY19**
- » Develop and deploy dashboards. **FY19**

Use predictive modeling for analyzing alumni engagement.

- » Select and use one productive modeling tool that connects easily with important University data resources. **FY18**
- » Develop predictive models and dashboards. **FY19-22**



STRATEGIC PLANNING STEERING COMMITTEE

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GG+A

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OUR MISSION

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.

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PEPPERDINE | Alumni Relations