
Alumni, Forever Mac

OUR MISSION & STRATEGIC GOALS 2016-2020



McMaster Alumni Association
Board of Directors





McMaster Alumni Association

A LETTER FROM OUR PRESIDENTS



On behalf of the McMaster Alumni Association (MAA) Board of Directors, we are pleased to present the 2016-2020 strategic plan for the McMaster Alumni Association. Our mission remains the same: to support McMaster, to engage with alumni and students, to provide services and benefits for our students and alumni, to communicate with and celebrate alumni of McMaster University. This new plan has been a creative collaboration of alumni volunteers, the MAA board of directors, university administrators, and members of the Alumni Advancement team.

Our alumni, now 180,000 strong, have grown in diversity over the past three years, and we are mindful of their changing needs in every stage of their lives. The rapid pace of technological advances continues to be an area that we are focusing on and ensuring that we are proactively embracing and incorporating into our work and delivery of communications, programming, services and benefits.

Over the course of the last three years, the MAA has accomplished many of the previous plan's goals. We have strengthened our partnerships with the McMaster Students Union, Student Affairs and Office of Graduate Studies to provide an array of career services, mentoring and networking programs as well as campus events such as Light up the Night – Mac Block Party which celebrates the end of the academic year. We believe it is critical to support and enhance the student experience to ensure their lifelong relationship with our alma mater.

We continue to explore and employ new methods for communicating McMaster's story and the alumni association's charge in providing alumni programs, events, services, and benefits of value on campus, in community or online.

Our plan looks to the future ensuring that the McMaster Alumni Association will continue to be relevant to its members and the communities when it celebrates its 125th anniversary on May 3, 2019.

Don Bridgman '78

President, McMaster Alumni Association
2016-2018

Sandra Stephenson '78

President, McMaster Alumni Association
2014-2016



Introduction

The McMaster Alumni Association was established on May 3, 1894 and will celebrate its 125th anniversary in 2019. The McMaster Alumni Association's strategic plan for 2016-2020 provides a map for the future of the Association, setting forth its goals, guiding its programs, and defining metrics to assess its performance over the next five years. Through the leadership of the board of directors of the McMaster Alumni Association, alumni volunteers, and university staff, the plan outlines strategies that will help support the Office of Alumni Advancement operations and budgets to achieve our common objectives.

The McMaster Alumni Association confirmed its commitment to its mission statement, which has guided the Association's activities since 1994. The mission statement of the Association is as follows:

- Support McMaster University
- Involvement of Alumni
- Recognizing Alumni Achievements
- Services & Benefits for Alumni
- Alumni Communication
- Involvement of Current Students

Our Starting Point

The 2013-2016 MAA Strategic Plan established four key priorities of the Association and work of the Office of Alumni Advancement as we continue to grow and develop our programs and communications to actively engage alumni and others in the life of McMaster. Our priorities were as follows:

Supporting Forward with Integrity: To contribute to the University's priorities of enhanced community involvement and experiential learning including community engagement, programming and networking.

Key accomplishments towards this goal include the establishment of a new online mentoring program, the McMaster Alumni and Partners Advisor Network as well as a new online networking tool, Brazen. Together these platforms have connected hundreds of alumni with each other and with current students. We expanded our MACServe Day of Service to multiple cities in Canada and the offering of MACServe alumni service trip increased participation of alumni in service and drew awareness to needs in our communities. We increased our recognition opportunities for service-oriented alumni with the Global Impact Award and fostered Hamilton pride and participation in local events through new partnerships for cultural events such as HPO and AGH Film Festival.



Communications: To investigate best practices to reach, engage and communicate effectively with internal and external audiences as they move through their life stages (incoming student, undergraduate/graduate experience, transition to young alumni, established alumni and senior alumni). Effective communications will demonstrate and promote the Association's relevance and value as well as have a particular focus in fostering pride for the University and the MAA.

An enhanced connection to University, student and alumni leaders with increased opportunities particularly using digital platforms was a strategy that will continue to be a feature of both communications and programming. Effective use of new technologies including Google Hangouts, a new website content management system and online registration system, Social Toaster – social sharing tool and increased sharing of video content were key elements of progress towards this goal. A detailed digital strategy was also established while traditional methods were confirmed where audience preferences and continued demand warrant.

Deepening Age & Stage: To review MAA programs and services to ensure they are positioned optimally for alumni at various stages in their relationship with McMaster.

Key accomplishments towards this goal included a program review with a focus on theme and educational content. Educational content continues to be a primary focus of the majority of all of our programming, with priority given to drawing on McMaster speakers. Programming is regularly reviewed and adapted to changing demands and trends.

Critically Evaluate Programming Against Measured Impact on Alumni Engagement: To develop better measures to better evaluate alumni engagement. Consistent use of the Net Promoter Score survey for evaluation of alumni events and programming has been adopted. The Alumni Engagement Score was established as a benchmark tracking alumni event participation, volunteerism and giving. The 2015 alumni engagement survey provided rich data to compare progress in areas since the first survey was conducted in 2009. Predictive modelling for non-respondent alumni will help us to better serve alumni based on their behaviours and attitudes (reported and predictive). The MAA annual report continues to share broad measures on performance of the program with the alumni and McMaster communities via email and our website.



Summary of the 2013-2016 Strategic Plan

Overall, this strategic plan has set us up to continue to address the needs of targeted McMaster audiences with relevant content and programming, delivered using effective, timely communications. The overarching theme of the last plan will carry forward as we continue to seek to increase and enhance the engagement of McMaster's alumni in line with the broadest goals of McMaster University.

The Next Phase of Alumni Programming at McMaster

The Strategic Landscape

McMaster's University Advancement division, our partners in alumni relations and annual giving programming at McMaster, in their 2015-2020 business plan outlined the following opportunities and challenges facing the post secondary environment and our work. They are as follows:

Changing alumni demographics present new opportunities...

Consistent increases in post-secondary enrolment have resulted in significant growth in post- secondary alumni populations across Canada and abroad. Not only are alumni numbers growing at a steady rate, but the overall demographic makeup is also changing. Recent graduates (within the last 10 years) comprise the largest alumni demographic. They are tech-savvy and transient – both of which require new and innovative approaches to alumni programming and engagement.

As of May 2016, 178,137 alumni have graduated from McMaster and live in 137 countries. The majority of our alumni population (115,528) reside in Ontario primarily in the Greater Hamilton and Toronto area and over 50% of all of our alumni have graduated since 2000.

Technology, digital & social have transformed the media landscape...

Mass media no longer dominates standard marketing strategy. In fact, some of those channels may soon no longer exist in the forms we have always known. Success today requires a new mix of channels and technologies ranging from social, digital, web and apps to online giving and connecting directly with audiences electronically (which we call being "our own newsroom").

The business of philanthropy is changing...

Dynamic shifts in the philanthropic sector have introduced a certain fragility to the potential for donor support. Donor renewal and adaptive strategies are needed for McMaster UA to respond



to several broad trends — aging donors and thinning “pipelines” of potential donors (as the number of active donors decline), not to mention a waning “middle” of the donor spectrum (i.e., supporters who are not at giving levels higher than \$1M, but who are well above the low end of giving levels).

Donor expectations also continue to climb, both in terms of type and level of impact they expect gifts to make and also their involvement in the application of their gift.

Competition for philanthropic support is keen and ongoing, with more than 30,000 registered charities in Ontario. Other U-15 schools, hospitals and charities with initiatives attractive to donors continue to create a highly competitive playing field. They invest more in their advancement operations, marketing and staffing, and can be expected to squeeze or reduce our ability to fund University priorities.

McMaster must respond to trends at the post-secondary systemic level...

Ongoing and significant policy uncertainty and financial restraints within the provincial government present the post-secondary sector with numerous unknowns. Budget cuts from 2013, which remain in place (e.g., cuts to the operating grant and funding reductions through international student recovery charges), coupled with restrictions on adjusting tuition levels, continue to have an impact.

Government interest in updating the funding formula is a new contributor to these uncertainties. This means McMaster must be creative in its positioning, adaptive in its planning and interactions, and strong in leveraging its influential relationships.

Forecasts of enrolment trends also suggest that McMaster will face increasing competition for recruitment at a time when enrolment demand across the sector is expected to decline for the next few years.

Rankings, reputation, communications and relationships all come into play in realizing McMaster’s full potential.

Internationalization is a mounting priority at many post-secondary institutions. McMaster’s international positioning is expected to be a growing factor as it enhances its reputation as a world-leading university.



Near-term economic and funding environments will be challenging...

The difficult economic/funding climate and government constraints are no secret. Canadian and international economic conditions will no doubt continue to fluctuate, and that volatility will have impacts on federal fiscal conditions and, in turn, the University. Of particular note is the pressure on research funding.

2015 Alumni Engagement Survey

The Alumni Association engaged Engagement Analysis Inc. to repeat its research from 2009 and assist with its strategic planning process. Between May 5 and June 2nd, 2015, alumni were solicited to participate in a survey measuring alumni engagement and gather perceptions and opinions regarding alumni programs. 60,490 alumni were solicited and 4,719 responded for an 8% response rate.

In 2009, 13.8% of the alumni survey participants scored as engaged while in 2015 14.3% scored engaged. The somewhat engaged group remained the same with 68.1% of alumni and the not engaged group declined from 18.2% to 17.6%.

Market Segmentation

During our strategic planning exercise, our volunteers and alumni staff reviewed various ways to divide the alumni population to maximize resource allocation and focus programs for the greatest impact. The three main segments should each be taken into account when developing programs with the following directions:

Age, Stage, Gender & Diversity

Building on work from the last plan, continue to develop programs that focus on activities of interest to alumni based upon where they are in their life. An addition to this plan is to explore gender focused programs and diversity-based programs.

Interest

Build programs that focus on the interests and backgrounds of alumni with particular focus on increasing the engagement of alumni from professional schools and for alumni in certain departments where interest is high but engagement is lower.

Engagement Level

The alumni survey and engagement scoring of the full alumni database shows that there are distinct groups of alumni with different levels of engagement. Programs should focus on



maintaining programs for those most engaged, explore programs of interest for those somewhat engaged at the higher levels and seek ways to redirect resources expended on those least likely to engage by providing “opt-in” options.

Our Guiding Principles for our Strategic Plan

The 2016-2020 strategic plan established the following principles that will guide the activities of the McMaster Alumni Association. We believe in:

- McMaster: its past, its present, and its future
- A shared passion for McMaster that transcends boundaries, real and perceived, engenders a cohesiveness of spirit, and helps form lifelong connection to our alma mater and builds a community of support for McMaster University.
- Involving McMaster alumni and friends in the life of the university through a variety of activities and programs with broad-based appeal, including educational events, volunteer opportunities, print, electronic and digital communications, mentoring, and career advice
- Connecting McMaster alumni and friends with one another
- Involving our students in the life of the McMaster Alumni Association
- Offering students and alumni opportunities for service and leadership
- Encouraging, utilizing, appreciating, and recognizing volunteers
- A staff team that embodies excellence, integrity, leadership, teamwork, creativity, openness, collaboration, professionalism, and fiscal responsibility

In the 2016-2020 plan, seven goals are set forth and strategies to attain them are listed. The plan emphasizes identifying alumni, determining their interests, and creating or expanding our programs for them that target the various stages of their lives. Tactical approaches to and analyses of print and electronic communications are recommended to measure results and determine successes.

Objective

Outcomes

1. Support McMaster University through a continued commitment to participation in governance, acting as an advocate and supporting fundraising with a focus on the growth of young alumni donors to McMaster.

- Support key initiatives of McMaster including but not limited to internationalization, mentoring, branding and marketing student support, student experience and career services.
- Raise profile, value and recognition of alumni giving their time to support McMaster University
- Continue to recruit alumni to represent the Alumni Association on the University's governing boards and the McMaster Alumni Association Board of Directors
- Continue to develop our alumni advocacy support in partnership with the University's government relations professionals
- Continue with our commitment to excellence in volunteerism including matching identifiable volunteer needs with volunteer roles; train volunteers at a high level; and recognize volunteer performance
- Support the philanthropic work of the Office of Alumni Advancement including providing up to \$25,000 in matching philanthropic funds to encourage McMaster's young alumni to make their first philanthropic gift to McMaster

2. Engage McMaster's evolving and shifting alumni constituencies by a clearer understanding of its demographic makeup and interests.

- Utilize demographic information, segmentation, trends and metrics to better communicate with and engage alumni
- Utilize surveys, segmentation and analytics to develop an understanding of alumni expectations from McMaster and its Alumni Association
- Develop strategies for targeted marketing and messaging based on age, stage, gender, diversity and involvement
- Determine priority segments for alumni programming including delivery of the alumni magazine

3. Foster high quality, distinctive, educational and service opportunities that deepen alumni engagement through on-campus, in community and online programming.

- Continue to focus on the Alumni Association as a gateway for educational and networking opportunities
- Enhance the involvement of alumni, their expertise and experience to provide learning opportunities for the McMaster community—on campus, in community and online

4. Make connections between alumni and students a cornerstone of the McMaster Alumni Association by creating more opportunities for interaction, programming and services.

- Continue strategic focus on student relations and MAC10 (young alumni) programming
- Build connections with Faculty offices (with focus on those without advancement staff: Social Sciences, Humanities, Science) to connect students to alumni from their programs; further collaborate on student events and programming and educate departments and students on the Alumni Association
- Continue to focus on the student/MAC10 and alumni mentoring online programming along with our campus partners with Evisors and Brazen
- Continue to strengthen partnerships with the McMaster Students Union, Residence Life, Athletics & Recreation, Student Success Centre and School of Graduate Studies to provide better services and more opportunities for alumni and students to connect with McMaster
- Continue to support student activities through sponsorship opportunities

5. Celebrate McMaster and alumni milestones, accomplishments and traditions through alumni events and alumni awards programs and communications.

- Increased recognition activity including nominating alumni for external awards and honorary degrees at McMaster including building campus partnerships to increase and enhance opportunities for alumni and student recognition
- Increased focus on the promotion of alumni pride points including sharing stories of success through print and digital media
- Continue to focus on providing opportunities for alumni to participate as speakers, panellists, advisors, and mentors
- Continue focus on the development of alumni profiles
- Development of digital recognition plan
- Enhance our graduates' pride in McMaster through omnichannel

Objective

Outcomes

6. Communicate a clear, consistent, and distinctive McMaster message

that aligns with the university's goals and values and builds alumni ties to the McMaster Alumni Association and to McMaster.

- To support the advancement of McMaster's reputation through direct and, where possible, two-way communications with primary target audiences and key individuals
- Support McMaster University's branding and marketing initiatives.
- Convey the impact of alumni worldwide and how that reflects McMaster's contribution to our city, province, country and the world
- Lead strategic alumni communications institution-wide and position alumni as a communications priority for McMaster
- Development of an alumni focused digital strategy including an audience lifecycle map
- Strategic use of our digital tools (Bambu, Sprout Social) to develop an alumni ambassador program to enhance our alumni and student pride in McMaster
- Expand direct storytelling to primary audiences: students, potential students, alumni and donors including expanded use of video, multimedia and digital components to advance our key messages and priorities
- Partner with Communications & Public Affairs on the development of long-term strategy for the McMaster Times to include a new digital version that complements the print magazine and allows for expanded storytelling online involving video, multimedia and other digital components

7. Develop the resources, data and funding sources

to meet the McMaster Alumni Association's strategic goals and support McMaster University.

- Manage annual spending by continuing to make strategic decisions about the relative value of new and ongoing programs and other expenditures
- Make strategic, cost-sensitive decisions about spending on communication, technology, events, and programming
- Explore new funding sources and continue to maximize potential of existing affinity programs through effective marketing activity
- Report on progress and impact in a concise manner
- Learn from what we do and share our experience in the alumni relations and annual giving fields
- Continue to support the enhancement of data for the alumni and donor database
- Enhance the use of alumni demographics to make evidence based decisions for programming, and services
- Continue to develop our digital strategy with metrics for measurement and a graduate journey map

Future Considerations

As the alumni and donor communities continue to grow at McMaster, the McMaster Alumni Association must:

- Address the growing challenge of fostering involvement in McMaster when alumni demographics, geographic disbursement, emerging digital demands present significant challenges
- Invest in programs and initiatives that keep the McMaster community actively engaged on campus and in the community
- Engage alumni to gain better data and insights which will enable us to communicate with and involve our alumni
- Provide value to the university community so that the relationship is mutually beneficial



Our Metrics

The McMaster Alumni Association is committed to increasing the number of alumni engaged with McMaster through participation in activities, philanthropy and volunteerism. We will continue to use the **Alumni Engagement Index** as the baseline metric for measuring our success.

ALUMNI ENGAGEMENT = Program Participation + Event Attendance + Volunteerism + Giving

PROGRAMS and EVENTS would include the following: all alumni events coordinated through the central alumni team; decentralized alumni events; athletic alumni events; volunteer committee meetings; reunions; affinity events; recognition events; online webinars; digital communication and social media programs; award recognition; affinity programs (where applicable).

VOLUNTEERISM is defined as participation on a volunteer committee; mentoring; speaking at a event or participation in a panel; event day of volunteer.

GIVING is defined as a gift during the calendar year – January to December.

ALUMNI ENGAGEMENT INDEX = ALUMNI ENGAGEMENT / TOTAL MAILABLE LIVING ALUMNI


A sample score from 2011 would be $12,223/84,420 = 14.47\%$

A graduate, who was a volunteer, attended twelve events and made a gift would count only once in the alumni engagement measurement used to calculate the index.

We will provide analytics to determine our program's overall health by establishing baselines, measuring progress at regular intervals, and setting goals based on one or five year results. We will strive to standardize and embed these metrics with our advancement colleagues across campus with the introduction of the Alumni Dashboard and within the Ellucian Advance system.

The Proposed Alumni Dashboard Metrics

1. **Contact Information:** address, phone and email percentages in the calendar year and over the previous five years as a percentage of the overall alumni population.
2. **Participation:** number of unique participants in the calendar year and previous five years as a percentage of the overall alumni population. A unique participant is defined as the total number of people who participated in at least one alumni program coordinated by the central and/or decentralized teams.
3. **Volunteer:** number of unique volunteers (in person and digital) coordinated by the central and/or decentralized teams in the calendar year and over the previous five years as a percentage of the overall alumni population.
4. **Giving:** Number and average gift size for unique alumni donors in the calendar year and over the previous five years as a percentage of the overall population.

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5. **Alumni Engagement Retention Rate:** Rate of alumni who renew their engagement in the calendar year and over the previous five calendar years through participation in the alumni program, volunteering for the University or Alumni Association, or a philanthropic gift to the University.
 6. **Funding and staffing:** University provided program dollars per graduate and full time professional staff (FTE) ratio to the total alumni population and compared with peer institutions when possible.

We will continue to use the Net Promoter Score as our method of evaluation for in person alumni events.

We will expand our understanding and measurement of digital metrics as we determine what are the best practices in these measurements. Our primary focus of social media monitoring will be on increasing engagement metrics, looking at the number of active engagements (comments/replies, shares/RTs, click-throughs) as a percentage of total audience. We will go beyond counting fans and likes as successes and look to increase the meaningful interactions we have with our audiences on social media. We will also look to leverage social successes to increase traffic to the website.

For more information regarding this plan, please contact Karen McQuigge '90, Director Alumni Advancement or Anne-Marie Middel '90, Associate Director Alumni Advancement at alumni@mcmaster.ca or 905-525-9140 ext. 23900



Alumni House



178,123

McMaster Alumni

Active	135,514
Lost	25,865
Removed by request	7,598
Deceased	9,146

*50% of alumni have graduated since 2000.



52%



48%

Class Size in 2015

7,007

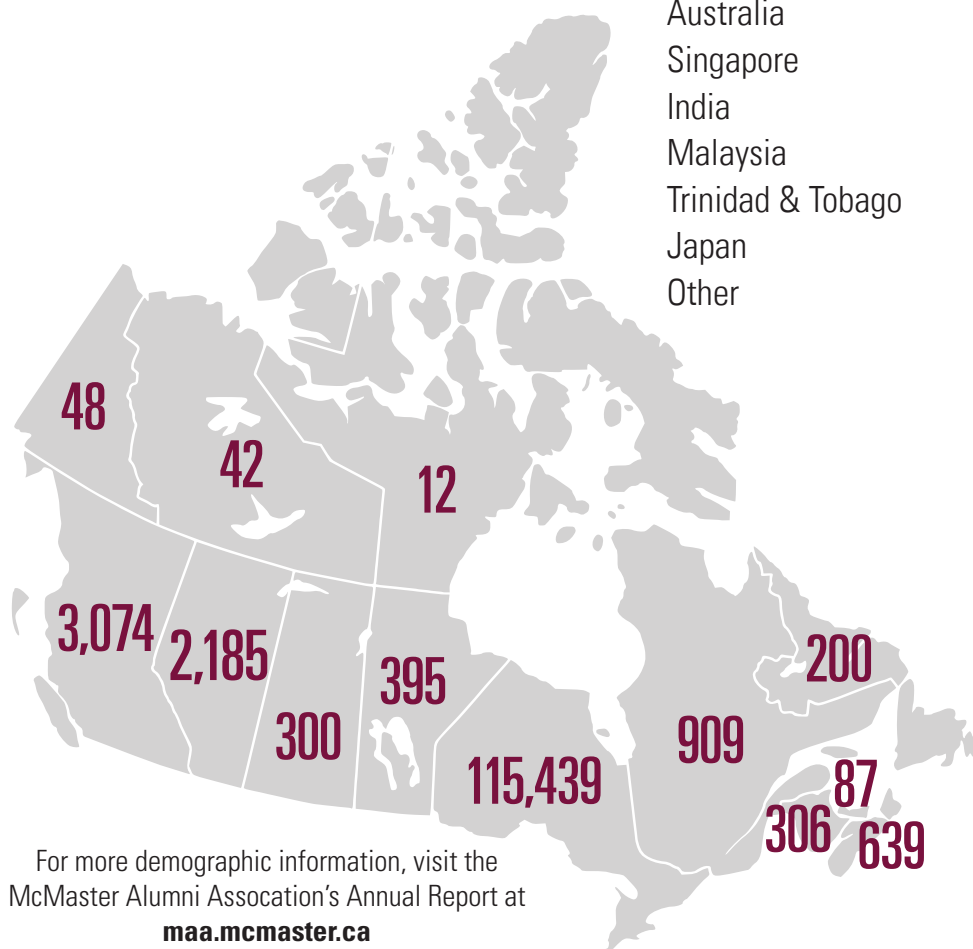


Faculty/Programme

Arts & Science	1,630
Faculty of Business	20,028
Continuing Education	4,968
Faculty of Divinity	1,605
Faculty of Engineering	19,491
School of Graduate Studies	166
Faculty of Health Sciences	22,284
Faculty of Humanities	28,012
Faculty of Science	37,802
Faculty of Social Sciences	48,681

International

United States	6,104
Hong Kong	828
England	490
China	392
Australia	275
Singapore	149
India	147
Malaysia	125
Trinidad & Tobago	110
Japan	113
Other	3,183



For more demographic information, visit the
McMaster Alumni Association's Annual Report at
maa.mcmaster.ca