Executive Summary

On June 26, 2010, four members of the College of Health and Human Development Alumni Society Board of Directors and two ex-officio members met in Malvern, Pennsylvania, to draft the Board’s 2011-2014 Strategic Plan. The participants were:

- Jennifer Sprankle, President
- Mark Mintzer, Past President
- Jason Diaz, President-Elect
- Sheri Parker, APG Committee Chair
- Nan Crouter, Dean, College of Health and Human Development
- Abby Diehl, Assistant Dean for Alumni and College Relations and Leadership Initiatives, College of Health and Human Development

In developing the strategic plan, the participants relied heavily upon input that was provided by Board members via a SWOT Analysis. Of particular interest were the strength of the Board’s current programs, the Board’s internal culture that serves as a springboard to success, the desire to connect with students, and the need to continue to support and cultivate the success of the Affiliate Program Groups.

The resulting plan has four main goals that support the Board’s commitment to excellence and long-term success:

- **Goal 1** – Refine existing programs that support connections among HHD alumni, faculty, and students.
- **Goal 2** – Create new and innovative programs consistent with the vision and mission of the Board.
- **Goal 3** – Strengthen the Board’s investment in the Affiliate Program Groups through direct engagement with APG board members.
- **Goal 4** – Complement and extend the College’s development efforts through advocacy and participation.

The following plan describes the Board’s planning process and elaborates upon the four main goals.

*Note: Although the School of Nursing is now a stand-alone academic unit, nursing alumni are considered part of the College for alumni relations purposes, and nursing alumni who join the Penn State Alumni Association become members of the HHD Alumni Society. Therefore, this strategic plan pertains to, and is inclusive of, all nursing alumni.*
Who are we?

First, the planning committee members examined the results of a SWOT Analysis that was completed by voting members of the HHD Alumni Society Board. Some of the responses, by category, included:

**Strengths:**
- Current plan
- Formal structure
- Board diversity
- Commitment
- Reputation
- APGs/MACS
- Culture
- Support of college/recognition by college of the value the Board brings
- Current programs

**Weaknesses:**
- Petersen Society
- Relationships with non-UP students
- Engagement with students
- APG issues:
  - internal mechanisms/people power
  - connections with seniors/recent grads/student organizations
  - social networking

**Opportunities:**
- Connecting with students
- Technology
- Pink Zone
- Blue & White Society connections

**Threats:**
- Lack of understanding of Board/structure by APG board members
**Where are we going?**

The committee members revised the vision and mission to reflect a specific desire to focus on connecting with people in the college, i.e. students, faculty, and fellow alumni.

**Vision Statement**

“The Board of Directors of the Alumni Society of the College of Health and Human Development is dedicated to harnessing the talents, time, and resources of alumni to assist the College in supporting the growth and achievement of students, faculty, staff, and fellow alumni.”

The mission statement was also revised accordingly:

**Mission Statement**

“The mission of the Board of Directors of the Alumni Society of the College of Health and Human Development is to promote the engagement and interaction of alumni, faculty, staff, and students through innovative programs and activities.”

**How are we going to get there?**

The participants expressed an interest in examining the current, 2008-2011, strategic plan, and using that as the basis for the 2011-2014 plan, rather than crafting a new plan from scratch. The reasons for this are that (1) the current plan contains many viable elements, such as the Board’s successful programs; and (2) the plan reflects the Board’s values, including a focus on building partnerships and strengthening and supporting the APGs.

The participants reviewed the current, 2008-2011 plan, the main goals of which are summarized below.

**Goal 1 – Strengthen relationships and create effective partnerships among the Board, the College and the University to refine existing programs.**

**Goal 2 – Continue to enhance the visibility and impact of the Affiliate Program Groups by establishing partnerships and building on past accomplishments.**

**Goal 3 – Complement and extend the College’s development efforts through advocacy and participation**

First, the participants decided to split Goal 1 into two goals. Goal 1 is now focused on existing programs, and Goal 2 on new programs. They then decided to keep the original Goals 2 and 3 (now 3 and 4) in the new plan.
Then, for each strategic action listed underneath each goal, the participants determined whether to eliminate it from the new plan or incorporate it into the new plan. In some cases, the strategic actions are largely unchanged; in others, they are revised.

Finally, the participants developed new strategic actions to accompany each of the four goals.

**Emphases**

Two main emphases underlie the plan, and emphasize the Board’s commitment to excellence and long-term success:

1. **Partnerships**
   - Where possible, be mindful of the benefits of partnerships

2. **Technology**
   - Where useful, utilize technology to connect alumni with each other and with students and faculty
2011-2014 Strategic Plan
Goal 1 – Refine existing programs that support the vision and mission of the Board.

Strategic Action 1a. Continue to support and extend existing programs that enhance students’ educational experiences.

Measures of success
1. During the 2011 calendar year, the HHD Office of Alumni Relations will conduct a review of the Mentoring Program with a focus on the following components:
   a. The size of the program
   b. The components of the kickoff dinner/workshop
   c. Communication with mentors and protégés
2. A report will be submitted to the Board at its spring 2012 meeting. This report will include recommendations pertaining to the components above along with (1) a description of the ways in which the Alumni Board can participate in achieving the recommendations and (2) a timeline for achievement of the recommendations.
3. The Careers Committee will, on an ongoing basis:
   a. Continue to conduct evaluations of its networking receptions and roundtable discussions with students
   b. Benchmark with other University Park college alumni societies about the programming they offer to students
   c. Determine whether additional programming should be offered to students

The committee will report on its efforts in each of these three areas during its committee report at each meeting of the Board.

Strategic Action 1b. Increase communication and engagement with groups associated with the Board.

Measures of success
1. By the spring 2011 meeting of the Board, the executive committee, in conjunction with the Dean and the HHD Office of Alumni Relations, will develop a plan for regular communication with Petersen Society members.
2. By the spring 2011 meeting of the Board, the executive committee, in conjunction with the Dean and the HHD Office of Alumni Relations, will develop a plan for engaging and communicating with HHD alumni who have received College or University alumni awards or who have served as presenters in the Distinguished Alumni Speaker Series.
Strategic Action 1c. Continue to sponsor the Distinguished Alumni Speaker Series with at least one annual speaker.

Measures of success
1. The executive committee will, on an ongoing basis, solicit nominations of alumni who might serve as speakers.
2. The committee will select its speaker by May of each year.
3. The HHD Office of Alumni Relations will track attendance each year based on representation from HHD academic units, other groups on campus, and alumni, and will make recommendations to the executive committee as needed to increase representation.

Strategic Action 1d. Refine and enhance the membership committee’s efforts to promote Blue & White Society membership among HHD students.

Measures of success
1. At the spring 2011 meeting, the membership committee will report to the full Board on the impact of its efforts to date.
2. By the spring 2011 meeting, the membership committee will, in conjunction with the membership staff of the Penn State Alumni Association, develop at least one additional program or initiative for increasing Blue & White Society membership during the life of the strategic plan.
3. The executive committee and the membership committee will review the committee’s programs and initiatives each spring thereafter to determine if any should be added, enhanced, or discontinued.

Goal 2 – Create new and innovative programs consistent with the vision and mission of the Board.

Strategic Action 2a. Solidify the Pink Zone event as the service project of the Board with the goal of increasing alumni, faculty, staff, and student participation in the event.

Measures of success
1. By December 2010, the executive committee will appoint a current Board member to serve as the liaison to coordinate planning for the event with College staff.
2. HHD alumni attendance at the event will increase by 10 percent in each year of the strategic plan.
3. The liaison will, on an ongoing basis, explore opportunities to partner with student groups, Blue & White Society members, mentors/protégés, and others to increase attendance.
**Strategic Action 2b. Assist with the transition of HHD-bound students transferring from a Commonwealth Campus to the University Park campus.**

**Measures of success**
1. During spring 2011, one or more members of the Board, along with staff from the HHD Office of Alumni Relations, will conduct several focus groups with recently-transitioned students, and with students who are about to make the transition, to determine what kind of help the Board can offer.
2. In spring 2011, one or more members of the executive committee will meet with Madlyn Hanes, vice president for commonwealth campuses, to obtain her views on what kinds of College-specific interventions would be helpful.
3. In fall 2011, the results of all focus groups and meetings will be presented to the Board along with an action plan for recommended programming.
4. In spring 2012, a pilot program will be rolled out for students making the transition that semester.
5. In fall 2012, a report on the success of the pilot program will be presented to the Board and recommendations for an ongoing program will be made.
6. In spring 2013, a formal program will be rolled out.

**Strategic action 2c. Explore the potential for a mentoring program for graduate students in the College of Health and Human Development.**

**Measures of success**
1. Beginning in 2011, the HHD Office of Alumni Relations, in addition to one or more members of the Board specified by the executive committee, will conduct an analysis of the need for such a program.
2. The results of the needs analysis will be reported to the executive committee. Should the committee decide that the results support the development of a graduate student mentoring program, the HHD Office of Alumni Relations, in conjunction with Board members specified by the executive committee, will conduct further analysis as to the feasibility and structure of such a program.

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**Goal 3 – Strengthen the Board’s investment in the Affiliate Program Groups through direct engagement with APG board members.**

**Strategic Action 3a. Improve communication by the Board with individual APG board members.**

**Measures of Success:**
1. By the spring 2011 meeting of the Board, the HHD Office of Alumni Relations will create an organizational chart that depicts the HHD Alumni Society and its relationship to the college and the Penn State Alumni Association.
2. The organizational chart, once approved by the executive committee, will be provided to all of the APG presidents and APG board members and subsequently to new board members.
3. By spring 2011, the APG committee chair, in consultation with the APG presidents and the HHD Office of Alumni Relations, will create an online document repository that can be accessed by Society and APG board members.
4. Beginning in spring 2011, minutes of the HHD Alumni Society Board meetings will be sent directly to APG board members by the HHD Office of Alumni Relations.
5. By the spring 2012 meeting of the Board, the APG committee chair and the Board president will develop a “Welcome to Your APG board” communication piece that will be sent by the president to new APG board members.

Strategic Action 3b. Assist the APGs in identifying and cultivating alumni to serve on their boards.

Measures of Success:
1. By the fall 2011 meeting of the Board, the APG committee will develop a plan for working with academic units to shore up faculty liaison, department head, and student society involvement in the APGs. Outreach to academic units will then occur on an ongoing basis.
2. At the spring 2011 meeting of the Board, the nominations committee will meet with the APG presidents and determine which APGs need support.
3. At the fall 2012 meeting of the Board, the nominations committee will present a “plan of action” for the APGs seeking support.
4. By the fall 2012 meeting of the Board, each APG will be encouraged to develop a “team charter” describing the responsibilities of APG board members.

Strategic Action 3c. Invite the board members of the MACS Award-winning APG to attend the Board’s fall awards dinner.

Measures of success
1. The executive committee will select the recipient of the MACS Award during its August conference call each year.
2. Each year, the HHD Office of Alumni Relations will notify the award-winning APG and send invitations to the Board’s fall awards dinner to each of the APG’s board members.

Goal 4 – Complement and extend the College’s development efforts through advocacy and participation.

Strategic Action 4a. Achieve 100 percent participation in giving to the College among all voting Board members.
Measures of success

Ongoing measures include:

1. Board members’ overall participation level will be tracked by the HHD Development Office and the percentage of members participating will be reported at each biannual meeting of the Board. (Attention will focus only on whether members are participating, not the size of the gift, and all contributions will be confidential. No one, other than development staff, will know who participated and who did not.)

2. The development committee will develop and implement a system whereby Board members are reminded of the 100 percent participation goal and reminded to make a gift if they have not already done so in order to strengthen the impact and community of giving created among voting members.

Strategic Action 4b. Extend development efforts to APG board members.

Measures of success

1. During the 2010-2011 fiscal year, the HHD Development Office will work with the HHD Office of Alumni Relations to monitor the efforts listed in Strategic Action 3a., and will work with the APG Committee Chair and individual APG presidents to determine when each APG board is to be solicited toward a 100 percent participation goal.

2. Beginning in the 2011-2012 fiscal year, all APG board members will be solicited on an annual basis with the goal of 100 percent participation by all APG board members. Each APG president will work with the HHD Development Office to develop a solicitation specific to each APG.