TO: Members of the Board of Trustees
FROM: President Sabah Randhawa on behalf of Kim O’Neill, Vice President for University Advancement
DATE: August 19, 2022
SUBJECT: Foundation and Alumni Association Boards Merger Update
PURPOSE: Discussion Item

Purpose of Submittal: Kim O’Neill will provide an update on the merger of the WWU Foundation and Alumni Association Boards.

Attachment: PowerPoint
WWU Alumni Association and WWU Foundation Merger Update

August 19, 2022
Discussion Background

Directive from President Randhawa to consider the merits of a combined Alumni Association-Foundation entity.

The opportunity is to focus on the collective mission of:

- Advancing alumni engagement
- Creating a culture of philanthropy
- Leveraging the strengths and expertise of each unit
- Better alignment, integration and operationalization
Merger Goals

To better align, integrate and operationalize the work of the Alumni Association and Foundation.

A merger of equals

UNIVERSITY ADVANCEMENT

The Western Foundation receives and encourages private giving to WWU in the form of annual gifts, endowed gifts, estate gifts, and gifts in kind, all of which support student scholarships, programs, and faculty members.

The Western Washington University Alumni Association strengthens Western by building strong and caring relationships that make a difference among our students, alumni, friends, and the greater university community.

Leverages each for more coordinated alumni engagement leading to increased philanthropy
Discussion Background

Steering Committee culled from both entities met over a series of meetings to consider a broad range of engagement factors:

- Value proposition
- Anticipated outcomes
- External opportunities
- Internal opportunities
- Concerns
- Core implementation challenges
- Proposed committee structure

THE PROCESS:
Transparent
Equitable
Thorough and Critical Discussion
Objective
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Value Proposition

A. Data
Operationalize key data points:
- Volunteer Communication
- Experiential Philanthropy

B. Segmentation
Engagement based on alumni demographics and Personas

C. “Life Cycle”
Strategic planning to reach alumni at all stages of their WWU journey

D. WWW Support
Aligns with WWU strategic goals of student, staff, alumni, faculty networks

E. Engagement
Rethinking engagement based on Time/Talent/Treasure parameters

F. Efficiency
Business practices, communications, event management

G. Structure
Re-envision the role of staff and volunteer boards

H. Metrics
Return on Investment based on Time/Talent/Treasure
Metrics

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**Volunteer**
- Formally defined and rewarding volunteer roles that are endorsed and valued by the institution and support its mission and strategic goals.

**Experiential**
- Meaningful experiences that inspire alumni, are valued by the institution, promote its mission, celebrate its achievements and strengthen its reputation.

**Philanthropic**
- Diverse opportunities for alumni to make philanthropic investments that are meaningful to the donor and support the institution’s mission and strategic goals.

**Communication**
- Interactive, meaningful and informative communication with alumni that supports the institution’s mission, strategic goals and reputation.

- Alumni in leadership positions
- High Involvement: Board, committees, advisory groups
- Low Involvement: community service, recruitment, mentoring, networking

- Event attendance on campus
- Participation in virtual engagement
- Post-event surveys
- Regional event attendance
- Alumni address updates

- New alumni donors
- Participation by generational group
- Participation by volunteer and engagement category

- Reach and frequency of WWU media
- Media usage studies
- Social media activity
- Web site analytics
Anticipated Outcomes

**INTERNAL**  The merger will result in a modernized model of a highly strategic, coordinated, efficient and intentional approach to alumni and donor engagement.

**EXTERNAL**  Alumni will be exposed to more meaningful engagement interactions with the University. This will strengthen their affinity and result in heightened volunteerism, advocacy and philanthropy.
Implementation Challenges

High level vision of modernizing a new collective enterprise

Implications for revenue and funding

Board leadership and committee structure: How to contribute to alumni/donor engagement success

What is new framework for engagement that is most critical for Western?

Implications for the alumni experience and understanding alumni needs

Cultural implications: merging two units into one

Support of Western’s academic and other campus partners

Communications plan for alumni, focusing on status of dues program

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Letter of Intent

Signed by the Executive Committees of the
WWU Alumni Association and the WWU Foundation
August 2022
Next Steps