

# Better Together

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The WWU Foundation and Alumni Association Merger



# Background

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# Changes

- Kim O'Neill begins tenure as Vice President of University Advancement & CEO of the WWU Foundation & assumes role as Executive Director of the WWU Alumni Association
- President Sabah Randhawa charges division to double fundraising in 5 years
- Institutes "One Team Our Team" mantra for advancement team
- Shifts focus to alumni engagement rather than revenue generation activities for Alumni Association
- Centralizes fundraising and alumni efforts to support University-wide initiatives
- President Sabah Randhawa asks the boards to consider merits of merger

# Most Compelling Reasons to Merge

1. Better alignment with the university mission and strategic goals
2. Deeper engagement of alumni and broader community
3. Long-term financial health of the organization

# Benefits and Expected Outcomes

- Increased alumni engagement and philanthropic investment
- Increased organizational efficiency and effectiveness
- Improved alignment to support the University's mission & strategic plan
- More effective engagement, communication and solicitation of alumni, volunteers and donors
- Unified, consistent messaging and engagement of alumni and external constituents

# Process

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Timeline & What's Next?

# Timeline

- March 2022
  - Steering committee formed
  - 3 representatives each from the Foundation, the Alumni Association and University Advancement
  - Trustee Chris Witherspoon (And former board member of foundation and alumni association)
  - Provosts Brent Carbajal and Brad Johnson
- April 2022
  - Consultant hired

# Timeline Continued

- Series of meetings with steering committee and both boards
  - May – Steering Committee launches
  - August – LOI signed by EC's
  - September – Joint board meeting
  - December – Full boards vote to proceed
  - March 9
    - Alumni Association membership approves merger
    - Alumni Board of Directors Meeting – Vote to approve merger documents
  - March 10
    - Foundation Board of Directors Meeting – Vote to approve merger documents



# What's Next?

- April – BOT consent to amend articles of incorporation
- May 19 & 20
  - Alumni and Foundation boards vote to approve officers & committee chairs
- June – Present revised MOU to BOT
- July 1 – New organization launches

# The Foundation for WWU and Alumni

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Name of New Organization

# Mission

- Advance the mission and strategic goals of Western Washington University
- Deepen engagement of alumni and broader community
- Inspire philanthropy (time, talent and treasure), secure and steward private investments to provide the resources necessary in the pursuit of academic excellence and inclusive achievement at Western

*The new organization shall continue the work of both  
the Foundation and the Alumni Association with a high degree of continuity*

# Who does this new organization serve?

- Students
- Alumni (graduates and former students)
- Community members
- Friends of the university
- Donors and prospective donors
- Staff & Faculty

# How does this organization serve alumni?

- Create and foster community
- Provide resources and experiences designed to bring alumni together
- Encourage lasting relationships between alumni and WWU
- Identify ways for alumni to stay involved with WWU

# How can one get involved?

- Be a part of the alumni community
- Advocate for Western
- Encourage prospective students to attend Western
- Volunteer
- Engage with social media and share Western stories
- Attend an alumni activity/event
- Serve on an advisory board
- Engage in a class
- Mentor students
- Help a student find a meaningful internship

# Already Better Together!

- Relaunch WE Connect – 2,942 total users (majority are alumni and students)
  - Users with a connection 25.6% (Benchmark goal of 20%)
  - Response rate: 52.2% (Benchmark goal of 70%)
- Virtual 5k/Walk –
  - Raised \$4,387 vs. \$2,178 in FY21 (101% increase)
  - Participants: 133 vs. 48 in FY21 (177% increase)
- Alumni events in partnership
  - Colleges/Departments: Theater, English, Geology, Athletics
  - Donor Relations: NYC Happy Hour, Western on the Peninsulas
  - Western Engaged Webinars: 86 webinars since July, 2022
- Relaunch Back2Bellingham
- Give Day
- Next: Corporate Chapters, Regional Chapters, Teacher Swag Campaign, Class Notes Campaign, Grow Western Advocates

# Structure

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The Foundation for WWU and Alumni



# Officers

- Chair
- Vice Chair
- Secretary
- Treasurer
- Immediate Past Chair
- President and CEO (Ex-Officio)
- Vice President and CFO (Ex-Officio)

# Committees and Charters

- Executive Committee
- Finance Committee
- Board Development and Governance Committee
- Strategic Initiatives Committee
- ADEI Committee
- Engagement Committee
- Philanthropy Committee
- Legislative Committee

*Each committee shall have a charter document on file*

# Endowments & Assets

- ALL distributions from the Alumni Association Endowment will continue to be directed exclusively towards alumni activities—in perpetuity
- The assets of the Alumni Association shall be subject to donor-imposed gift restrictions and shall not be diverted from charitable purposes
- The endowment held by the Alumni Association will be managed by the Finance Committee, which will also manage the endowment and assets of the Foundation

# Questions?



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