

## **U.S. Naval Academy Alumni Association and Foundation Draft Enterprise Strategic Plan FY 2012-2020 (3-30-11)**

### **Introduction**

This draft strategic plan outlines a 10-year strategic direction and goals for the U.S. Naval Academy Alumni Association and Foundation (i.e. the Enterprise). The plan builds on the solid history and success of both organizations and their combined core competencies of Engagement, Communication and Fund Raising to sustain a relevant and thriving community of alumni, family and friends in support of the Naval Academy and Brigade of Midshipmen. A key initiative in this decade will be preparing for and conducting a significant fund raising campaign on behalf of the Naval Academy. This campaign is an integral part of all five goals in this plan.

In implementing this strategic plan, the Enterprise will reach and serve its broad constituency including the following:

- High School Students & Families with Interest in the Naval Academy
- Brigade of Midshipmen
- Midshipmen Parents, Families & Friends
- Alumni (10 Generations)
- Alumni Parents, Families & Friends
- Widows & Widowers of Alumni
- Corporate Sponsors & Contributors
- Naval Academy Leadership & Faculty
- Navy and Marine Corps Service/Warfare Communities

### **Plan Format**

This draft Enterprise strategic plan is organized in four sections. Section I paints a broad long-term picture of the drivers in the external environment that will likely impact the Alumni Association and Foundation in this decade. Section II presents the recommended 10-year strategic direction and Enterprise goals. Section III outlines primary indicators the Enterprise will use to measure its overall level of success. Section IV outlines initial 12 to 24 month objectives to advance the 10-year goals and additional goal level performance indicators.

### **Plan Updates**

Senior leadership will annually review progress and update the Enterprise strategic plan. The update will include continuing to align the plan goals and objectives with the Alumni Association 2020 vision and the Naval Academy Strategic Plan and 2020 vision.

### **Section I. 2011-2020 Environmental Review**

The following will be important drivers in the Enterprise operating environment in this decade. These drivers are important factors in the strategic direction and proposed 10-year goals in this plan.

- Change will be a constant.
- Agility, meaning the capacity to respond quickly and effectively to new challenges and opportunities, will be more of a necessity.
- The US economy will continue to experience a slow recovery with increasing pressure and action to reduce federal government spending. One result will likely be shifting and changing resources to support the military.
- Although flat in 2011 compared to pre-recession giving levels, charitable contributions to higher education are rebounding according to recent nonprofit sector studies.<sup>1</sup> As the economy continues to improve this should bode well for education giving in this decade.
- Partnerships (i.e. with Alumni chapters and clubs, corporations, etc.) will be more important than ever to access and effectively leverage available resources.
- Trends in market segmentation and individual constituent needs make on-going input from constituents a necessary information source for updating Alumni program strategies with fresh ideas that include some calculated risks.<sup>2</sup>
- The trend for individuals to belong to all types of unique groups and communities will increase pressure to create a high value from Alumni Association membership. The rationale for being involved in the Alumni Association will have to be more compelling and engaging.<sup>3</sup>
- The Naval Academy will have more diverse students. As a result Alumni Association members and Foundation donors will include more women, and more African American, Asian, and Hispanic constituents.

## **Section II. Enterprise Strategic Direction & Goals FY 2012-2020**

The 10-year strategic direction in this plan is a response to:

- The dynamic environment in which the Enterprise operates;
- Recommendations from the Alumni survey completed in the summer 2009; and
- A commitment to leverage the three core competencies of the Alumni Association and Foundations - engagement, communication and fundraising – in the structure and operations of the Enterprise.

During the period FY 2012-2020, the Alumni Association and Foundation will enhance cooperation and collaboration to expand engagement and communication for two broad purposes. One purpose is to strengthen the Enterprise as a lifelong resource for all constituents and motivate them to take advantage of the full range of programs and services offered by the Enterprise. The second purpose is to inspire and motivate more constituents to grow their financial support of the US Naval Academy and its alumni community. The following themes are embodied in this strategic direction:

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<sup>1</sup> <http://www.philanthropyjournal.org/news/higher-ed-fundraising-still-struggling>

<sup>2</sup> strategictrendsinalumniengagementcasesummit09-090712175106-phpapp02

<sup>3</sup> strategictrendsinalumniengagementcasesummit09-090712175106-phpapp02

- Cooperate and collaborate internally across the Enterprise to offer enhanced programs and services for all constituents;
- Foster and strengthen engaged relationships with increasingly diverse constituencies that comprise the US Naval Academy Community;
- Implement more creative, comprehensive, and compelling marketing and communications strategies;
- Maintain a capable comprehensive Information Systems and IT/Communication infrastructure;
- Maintain financial integrity and a healthy financial position;
- Prepare for the next wave of ambitious fundraising initiatives; and
- Develop and retain a strong, capable enthusiastic staff and volunteer leadership.

The Alumni Association and Foundation will together pursue this strategic direction through five Enterprise-wide goals. All three divisions comprising the Alumni Association and Foundation structure will share responsibility and accountability for implementing this direction and accomplishing the goals.

- Goal I:** Build and sustain lifelong and meaningful relationships with increasing numbers of alumni, parents, families and friends.
- Goal II:** Build and sustain strong connections across the Alumni Association and Foundation communities with robust information technology and communication.
- Goal III:** Enhance and preserve Enterprise fiscal health through financial integrity, strategic budgeting and cost-effective programs.
- Goal IV:** Grow contributions in support of the US Naval Academy short-term plan, prepare for a comprehensive campaign and enhance the culture of philanthropy.
- Goal V:** Invest strategically in human capital to sustain the Enterprise as a high performing organization.

### **Section III. Proposed Enterprise Results FY 2012-2020**

The Enterprise will measure its success in FY 2012-2010 with the following four primary performance indicators.

- Growth in Alumni Association membership in all categories.
- Alumni, families, and friends across ten generations are more actively engaged and satisfied with alumni community connections.
- Growth in Foundation donors and donor engagement in all categories.
- Growth in Contributions and Earned Income (i.e. non-contribution revenue).

In addition to these primary indicators, there are also indicators associated with each of the five Enterprise goals. The Enterprise will pursue these results with a robust set of 12 to 24-month

objectives designed to advance each goal and the overall plan. Objectives will be reviewed and updated as needed as the plan is implemented.

#### **Section IV. Proposed Enterprise Objectives FY 2012-2013**

**Goal I: Build and sustain lifelong and meaningful relationships with increasing numbers of alumni, parents, families and friends.**

**Performance Indicators:**

- Growth in Alumni Association membership in all categories.
- Alumni, families, and friends across ten generations are more actively engaged and satisfied with alumni community connections.
- Percentage increase in Earned Income (i.e. non-contribution revenue).

**Objectives:**

1. Determine what constituents want and require from alumni programs and engagement opportunities and evaluate the effectiveness and return on investment via market research, best practices and ongoing analysis.
2. Develop benchmarks for multi-year membership growth.
3. Design and execute all events as engagement opportunities.
4. Facilitate Alumni in supporting the Naval Academy admissions strategy.
5. Explore new ways to include Foundation (Athletic & Scholarship Programs – ASP) Trustees and Naval Academy Preparatory School (NAPS) parents in events and engagement opportunities.
6. Explore the opportunity to develop programs and events around targeted audiences identified by our 2009 Alumni Survey, including more senior alumni, young alumni, and women, as well as with other alumni networking communities such as warfare service communities or business networking communities.
7. Develop a larger energized and engaged volunteer corps and find new ways to connect clubs, chapters and other groups in the alumni community.
8. Build upon the Naval Academy's strong brand identity to share compelling messages and editorials in support of the Alumni Association and Foundation missions.
9. Develop and maintain effective partnerships and strategic alliances between internal staff and external partners.
10. In partnership with the Enabling Division, Engagement will explore ways to provide improved services and merchandise highly valued by alumni, parents, families, and friends.

**Goal II: Build and sustain strong connections across the Alumni Association and Foundation communities with robust information technology and communication.**

**Performance Indicators:**

- Increase in the time visitors spend on the Alumni Association website.

- Constituents across ten generations are satisfied with the website and communication strategies.

**Objectives:**

1. Create a robust, engaging online experience that is functional across ten decades of constituents.
2. Provide information infrastructure and policies that assure integrity, reliability and continuity.
3. Promote Enterprise efficiencies through technology solutions that are cost-effective, scalable, adaptable and driven by business requirements.
4. Continue to improve technology to support on-line communication and financial activity among all constituents.

**Goal III: Enhance and preserve Enterprise fiscal health through financial integrity, strategic budgeting and cost-effective programs.**

**Performance Indicators**

- The annual Enterprise audit is clean with an unqualified opinion and no findings of material weakness in controls.
- Positive financial condition (measured by an index).

**Objectives:**

1. Support the US Naval Academy in complying with rules and regulations governing gift acceptance and disbursement.
2. Support the Enterprise in preparing for the next fundraising campaign; implement increased on-line financial activity capabilities.
3. Ensure financial transparency with internal and external stakeholders.
4. Maintain financial integrity.
5. In partnership with the Engagement Division, Enabling will explore online and other new or improved revenue opportunities.

**Goal IV: Grow contributions in support of the US Naval Academy short-term plan, implement a comprehensive campaign, and enhance the culture of philanthropy.**

**Performance Indicators:**

- Readiness for a successful multi-million fund raising campaign.
- Growth in Foundation donors and donor engagement in all categories.
- Growth in contributions.

**Objectives:**

1. Strategically position the Enterprise for a comprehensive fundraising campaign.
2. Grow new commitments.
3. Grow the Annual Fund.
4. Increase support for Athletic Excellence.
5. Grow support for the Foundation's prep school program.

6. Enhance and expand stewardship functions at all levels of the gift pyramid.
7. Increase engaged volunteer leadership.

**Goal V: Invest strategically in human capital to sustain the Enterprise as a high performing organization.**

**Performance Indicators:**

- High staff morale and positive work climate.
- Level of investment in dollars and time for staff professional development.

**Objectives:**

1. Recruit and hire qualified employees who are enthusiastic about the Enterprise mission.
2. Contribute to staff retention with an Enterprise wide organizational training and professional development program.
3. Continue to strengthen and foster a work environment that reinforces good internal customer service.