1. Support Services Report Template

Report Info

Name of the person completing this report: Penny Peak
Title of the person completing this report: Director, Alumni Relations & Programs
Supervisor/dean reviewing report: Ara Serjoie
Service: Alumni Relations
Division/College: University Advancement

3. Mandated Service

Link to Scoring Rubric

1.1 Please indicate below if any aspect of the service is legally mandated by any of the following and provide the relevant reference.

Federal Law: N/A
State Law: N/A
Executive Order: N/A
Title 5: Yes
Campus Policy: N/A
Any other: N/A

Provide a brief explanation, if necessary, in < 60 words.

California Code of Regulations, Title 5, Division 5, Chapter 1, Subchapter 5, Article 15 discusses the policies and procedures governing the recognition and management of alumni organizations, including the use of funds and institutional resources. These policies are echoed by the Memorandum of Understanding between CSUEB and the Cal State East Bay Alumni Association, signed on July 1, 2013.

4. Importance of Service

Briefly describe the service in terms of its primary function(s) and purpose(s) using <120 words

Alumni Relations cultivates lifelong relationships with our alumni to inspire their active engagement with the university. Primary alumni programs:

Membership: Engages students and alumni as annual and lifetime members, providing useful benefits and the basis for growing, annual financial support.

Communications: In collaboration with University Communications, consists of web pages, email announcements and newsletters, Cal State East Bay Magazine, and social media (Alumni LinkedIn, Facebook, and Twitter) to build pride, invite engagement, and share information about alumni achievements and university news.

Alumni Engagement: Includes focused alumni networking events, Distinguished Alumni program, campus tours, and volunteer opportunities (including Alumni Association board, job panelists, and guest speakers).

Fundraising: Engages alumni as donors to the university in partnership with Development.

Link to Scoring Rubric
2.1 Who are the primary receivers of this service? (Please enter the percentage of each user group that is relevant)

- Students: 10%
- Faculty: 5%
- Administrators/staff: 5%
- Alumni: 60%
- Colleges/departments: 20%
- Total: 100%

Link to Scoring Rubric

2.2 Please indicate the direct or indirect impact of the service on students for each of the three University Action/Student Impact Areas listed below (for example processing financial aid applications would be direct impact on students while managing utility services would be indirect).

<table>
<thead>
<tr>
<th>Impact Area</th>
<th>Direct Impact on Students</th>
<th>Indirect Impact on Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Provide a brief narrative (<60 words each) explaining your selection for each area.

<table>
<thead>
<tr>
<th>Impact Area</th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>Ideally, alumni can be involved in this role by assisting with recruitment activities and elevating scholarships to attend CSUEB.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>Alumni Relations helps secure scholarship support, builds pride in alumni accomplishments, and provides students with connections to alumni who can provide advice about succeeding in college and careers.</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>Alumni Relations provides alumni networking, ongoing communications, discounted access to AACE career services, and other engagement opportunities to help students and alumni find meaningful lifework.</td>
</tr>
</tbody>
</table>

Link to Scoring Rubric

2.3 Applying the four choices presented below, please indicate the consequence of NOT having this service on each of the actions in the left hand column.

<table>
<thead>
<tr>
<th>Impact Area</th>
<th>4 - Service provides evidence of direct impact in more than one area</th>
<th>3 - Service provides evidence of direct impact in one area</th>
<th>2 - Service provides evidence of indirect impact in more than one area</th>
<th>1 - Service provides evidence of indirect impact in one area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Provide a brief narrative (<60 words each) explaining your choice.

<table>
<thead>
<tr>
<th>Pre-college (helping students to enter the system)</th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each selection)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alumni Relations does not address pre-college students presently but its potential to do has been under-utilized at the University.</td>
<td></td>
</tr>
</tbody>
</table>

| During college (helping students succeed while they are at Cal State East Bay) | Scholarship support, alumni advice (through job panels, guest speakers, and networking), and stories about model alumni will help encourage some students to persist and succeed in college. |

| After college (helping students establish meaningful lifework and be socially responsible contributors to society) | Alumni networking and communications will help some students and alumni find meaningful work. |

## Link to Scoring Rubric

### 2.4 Alignment with Shared Strategic Commitments

How does this service contribute to or align with any of the eight Shared Strategic Commitments (SSC) listed below?

<table>
<thead>
<tr>
<th>Reinforce academic quality through open-minded inquiry, innovative teaching, engaged learning, and distinguished scholarship</th>
<th>Alumni Relations reinforces academic quality by sharing stories of faculty members' honors and impact and helping students and alumni understand the value and long-term impact of their education at CSUEB.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enhance our inclusive campus, responding to the backgrounds and interests of our diverse community and promoting their academic, professional and personal development</td>
<td>Alumni Relations highlights our successful and diverse alumni, making them visible to students and arranging networking events, panel discussions, and guest speaking opportunities where alumni can share professional and personal advice and serve as inspiration to students.</td>
</tr>
<tr>
<td>Serve students first, by expanding access and enhancing each student’s educational experience and prospects for success as a graduate and life-long learner</td>
<td>Access is expanded through scholarship support (Alumni Scholarship and Save Our Students Scholarship) and by sharing stories about the impact of scholarship gifts. Educational experiences and prospects for success are enhanced as we build a supportive alumni community that provides advice, internships, and job opportunities to students and alumni, and financial support to the University.</td>
</tr>
<tr>
<td>Foster a vibrant community through enriched student services and student life that support student engagement and learning</td>
<td>Alumni volunteers and role models contribute to the perception of a vibrant University community with supportive and successful alumni. Alumni Relations involves alumni in student services and programs through AACE, Student Life &amp; Leadership (Smooth Transitions), ASI, and in Orientation, Honors Convocation, Commencement, Ethnic and EOP graduations, and other programs.</td>
</tr>
<tr>
<td>Contribute to a sustainable planet through our academic programs, university operations, and individual behavior</td>
<td>Alumni Relations focuses on building sustainable lifelong relationships and engagement with alumni that grows along a continuum of financial and volunteer support.</td>
</tr>
<tr>
<td>Continuously improve our efficiency, transparency, and accountability while practicing mutual respect, responsiveness, and collaboration across the University</td>
<td>Alumni Relations continuously evaluates, refines, and documents processes related to alumni and campus interactions, membership fulfillment, handling of private information, and accountability. Respect, professionalism, and collaboration are modeled and encouraged. Expectations for high customer service and a pervasive spirit of Pioneer pride are shared with student assistants and volunteers.</td>
</tr>
<tr>
<td>Support the civic, cultural, and economic life of all communities in the regions we serve through partnerships that promote education and social responsibility</td>
<td>Alumni Relations builds awareness on and off campus about the significant contributions our alumni make in their communities. We build partnerships with alumni to find and promote models of educational achievement and social responsibility and to build a pipeline of involvement and financial support for ethical and responsible student achievement.</td>
</tr>
<tr>
<td>Demonstrate our continuing record of leadership and innovation in higher education, focused on 21st century</td>
<td>Alumni Relations helps to discover and publicize alumni stories of leadership in higher education and STEM fields, which provides additional proof of impact in these...</td>
</tr>
</tbody>
</table>
For the alumni relations department, the emphasis is on actively engaging alumni in various ways:

1. **Enhancing and Marketing the Alumni Membership Program**: By growing the number of annual and lifetime members each year, alumni feel more involved, which increases financial and volunteer support for the university.

2. **Alumni Communications**: Continuously improving alumni communications to meet best practices and fostering knowledge and pride in alumni achievements.

3. **Increasing Student Engagement**: Initiatives such as starting an alumni student association, partnering with campus partners, and encouraging alumni to offer internships and jobs to students.

4. **Focused Alumni Events**: Engaging alumni through targeted events that align with their interests and foster closer relationships.

**5. Quality of Service**

- **Assessment of Quality**: Alumni Relations assesses the quality of their services.

- **Quality Measures**: They use benchmarks, best practices, and measures of success, such as timeliness, accuracy, meeting deadlines, and satisfactory completion of assignments.

- **Evaluation Methods**: Alumni events are reviewed against budget, attendance, feedback, and short- and long-term impact. Similarly, alumni programs conclude with participant evaluations.

- **Quality Improvements**: Alumni processes are continually reviewed to improve timeliness and accuracy, with feedback and comments welcome. Quality and satisfaction are open to discussion.

- **Best Practices and Sources**: The CSU Chancellor's Office and other CSUs are benchmark sources. Alumni programs are often public, and staff are open to feedback to improve quality and satisfaction.

- **Measure Adoptions**: As staff changes occur, every aspect of alumni relations is reviewed, reflected, and revised to align with current needs, goals, and resources. The overall aim is outstanding customer service and highest quality programs.
evaluation process allows staff and volunteers to share observations and comments to ensure that programs are continually refined and strengthened.

Link to Scoring Rubric

3.3 What idea(s) do you have for improving the quality of this service within existing resources (e.g. development of benchmarks, surveys, feedback, etc.)? Please describe your plan(s) in < 120 words.

Continue involving staff and volunteers in individual program evaluations; continue to improve the goal-setting process; seek customer feedback via surveys or social media when appropriate.

Link to Scoring Rubric

3.4 What ideas do you have for improving the quality of the service if additional resources were provided. Please describe your idea(s) in <120 words.

Additional resources would allow more alumni, students, and members to be served through more frequent communications and more engagement opportunities that reflect our value of highest quality program execution. In this case, quantity of programs reflects quality in the sense that we cannot currently offer alumni programs at the quantity that is considered best practices at our peer universities.

Link to Scoring Rubric

3.5 Do you use any formal or informal process to assess the level of satisfaction of the service users?

Yes

If yes, describe the process and most recent results in <120 words. If no, please explain.

In the 2012 CSUEB Alumni Attitude Survey, alumni overwhelmingly rate their decision to attend CSUEB a positive one and show a strong desire to stay engaged after graduation.

Recommendations: more personalized communications to alumni; enhance opportunities for students to interact with graduates; increase visibility of events and career development programming; provide networking opportunities; highlight impact of events; communicate value of degree by providing opportunities to meet and hear about “smart” people; segment communications and programs for young alumni and communicate regularly with them regarding services and benefits; make guest lecturer visits visible; prove we paid attention to the survey responses; increase the number of alumni stories.

Link to Scoring Rubric

3.6 The university recently conducted a customer satisfaction survey for some services (results for this service are attached, if applicable). Do you have any comment or response to the results? Please describe in <120 words.

NA

Link to Scoring Rubric

3.7 Do you have any formal or informal guidelines for personnel in your department regarding how to treat/interact with receivers of this service?

Yes

If yes, please describe in <120 words. If no, please explain.

Written guidelines include responding to calls and emails within 48 hours. Staff members talk about responding respectfully and professionally in all cases; expressing pride and excitement about CSUEB and its programs; listening to and acknowledging complaints; and sharing information and a positive view if appropriate (for example, some alumni start a conversation by
complaining about the name change, but may not realize it is one of five name changes).

3.8 Does your service have annual goals (targets) of achievement regarding the **quality** of the service provided?

**Yes**

If yes, describe the annual quality goals (targets) and indicate if the service achieved those goals (targets). Please provide evidence, if possible, in <120 words. If no, please explain.

Due to staff changes in 2013, alumni programs have been under review and revision. A multi-year program plan is nearly complete, which will set up baseline expectations for quality of service.

Measures of quality will include: the level of increased engagement through event attendance, responses to invitations, surveys, and social media posts, volunteer involvement, new memberships purchased, memberships renewed and upgraded, and increased giving.

In addition, general quality improvements are named in the plan, including:
- Undertake projects to improve alumni data.
- Create attractive membership materials.
- Increase the quantity of alumni stories featured online.
- Revise the alumni website design for usability.
- Increase the impact of all events by posting photos and news of impact.

3.9 Does your service have annual goals (targets) of achievement regarding the **quantity** of service provided?

**Yes**

If yes, describe the annual quantity goals (targets) and indicate if the service achieved those goals (targets). Please provide evidence, if possible, in <120 words. If no, please explain.

As mentioned above, a multi-year program plan is nearly complete, which will also set up baseline expectations for number and type of programs.

Quantity goals will include such measures as:
- Annual membership renewal and upgrade campaign (with sales targets for each membership group).
- Monthly email newsletter.
- Launch of student alumni association and weekly alumni tours.
- Production of 2-4 local, focused alumni events.

6. Efficiency of Service (cost effectiveness)

4.1 Using the spreadsheet provided for all employees in your department, please distribute salaries of individuals across all services provided to reach an educated or reasonable estimate of the cost of providing the service.

103837

Attach your allocated spreadsheet here.
4.2 Using the spreadsheet provided, please distribute your department's annual operating expenses across all services provided to reach an educated or reasonable estimate of the cost of providing the service.

Link to Scoring Rubric

4.3 Using the spreadsheet provided, please distribute the square footage of work space across all services provided to reach an educated or reasonable estimate of the use of this resource.

Link to Scoring Rubric

4.4 During the last three years, have you adopted any measures to improve the efficiency (cost effectiveness) of providing this service (e.g. reducing salary costs, operating expenses or use of space, or increased output without increasing cost. Etc.)?

Yes

If yes, please describe the measures in <120 words. If this is a new service introduced over the past three years, please indicate. If no, please explain.

Alumni Relations has been operating at a reduced level during the last three years. In 2010, one staff member handled Alumni Relations, a reduction in staffing from previous years. In July 2011, the Alumni Director assumed additional responsibility for directing the Annual Fund, previously a separate staff position, thus increasing cost effectiveness. Through this consolidation, basic functions of both positions were covered, although output was reduced, which did not meet the goals of the division. In January 2013, Annual Fund and Alumni Relations were returned to separate positions and a new Alumni Director was named. This move has increased salary costs for Alumni Relations, but functionality has improved in order to meet increased program goals.

Link to Scoring Rubric

4.5 What idea(s) do you have for improving the efficiency (cost effectiveness) of this service within existing resources (e.g. restructuring, merging, outsourcing, ways to cut costs, technology, etc.)? Please describe those ideas in <120 words.

As explained above, Alumni Relations is recovering from restructuring that had reduced staffing and needed capacity. As current staff builds experience with repeated programs, efficiency will increase through program evaluation and refinement.

Link to Scoring Rubric

4.6 What idea(s) do you have for improving the efficiency (cost effectiveness) of the service if additional resources were provided. Please describe your idea(s) in <120 words.

Additional resources could allow Alumni Relations to engage greater numbers of alumni creatively and effectively in several areas: 1) membership acquisition, renewal, and upgrade; 2) communication about alumni and university success and impact; and 3) events and programs that build connections and pride. The membership campaign will increase income to support alumni programs and more deeply engaged alumni will lead to increased financial and volunteer support for the University.

Link to Scoring Rubric

4.7 Do you have any plan(s) to improve the efficiency (cost effectiveness) of this service in the next 1-2 years (e.g. reducing costs, increasing productivity, etc.)?
Yes

If yes, please specify whether these plan(s) involve reducing salary costs, operating expenses and/or use of space. Please describe your plan(s) in <120 words. If no, please explain.

The multi-year plan for alumni relations envisions a vigorous annual membership campaign, focused alumni events, and minor enhancements to alumni communications. Increased membership revenue and use of student assistants and a student intern will help ensure that program capacity is increased while remaining cost effective.

Link to Scoring Rubric

4.8 Please describe the estimated output for this service for fiscal year 2011-12, quantify if possible (e.g. volume, service tickets resolved, people serviced, appointments, etc.) in <120 words.

The volume of activity has fluctuated with the staffing changes. In key program areas, annual Alumni Relations activity has consisted of:
1) Membership: A new grad membership campaign, plus an irregular renewal campaign.
2) Communications: Support for communications undertaken by University Communications, plus invitations to alumni mixers.
3) Alumni Engagement: 3-4 alumni mixers around the Bay Area, a Homecoming event, and promotion of a CSU event in New York; management of the Alumni Association Board and their budget; involving alumni in University programs; managing the Alumni of the Year program; serving as point person for alumni and responding to alumni inquiries.
4) Fundraising: No fundraising, as Alumni Relations was deemed to be largely separate from fundraising.

Link to Scoring Rubric

5.1 Are you aware of services similar to this one that are being provided by another department at CSU East Bay?

Yes

If yes, please provide a list of those departments. How are the services described here similar or different? Please describe in <60 words.

Limited alumni engagement takes place across campus. Some departments include alumni in social media, alumni gatherings, or graduation events. Some professors and clubs involve alumni as guest speakers. Only Alumni Relations manages alumni affairs on behalf of the entire University.

Link to Scoring Rubric

5.2 Is there anything unique or distinctive about your service? Please describe what is unique or distinctive in <120 words.

Alumni Relations is the only entity that directly represents and manages programs to engage CSUEB’s 120,000 alumni.

Link to Scoring Rubric

5.3 Are there any additional things about this service that you would like the task group to know? Please describe/explain in <250 words.

CSUEB has the lowest alumni staff to alumni ratio of all 23 CSUs (one staff member for 120,000 alumni). It is an honor to engage with our outstanding alumni, learn and share their stories, and involve them in the life and success of the University.