

ASSOCIATION OF YALE ALUMNI



YALE AMBASSADORS IN ACTION

**THE AYA STRATEGIC PLAN: A NEW CHAPTER
2012-17**

**AS APPROVED BY THE AYA BOARD OF GOVERNORS
NOVEMBER 8, 2012**



Executive Summary

This Strategic Plan is grounded on the premise that the gifts that Yale offers its students can be given again by its alumni. Yale alumni want to give. They want to lead. *They want to serve.* They want to shape their world and to serve Yale, fellow alumni, and people and communities who are in need. That *call to service* is a part of what defines them as Yale alumni and part of what has always defined Yale. The vision of the Association of Yale Alumni as a community of alumni dedicated to volunteer leadership and to service is both transformational and traditional. This Strategic Plan focuses on connection and engagement to support and enhance this essential aspect of Yale, to enable Yale alumni to impact the world around them, to change lives at Yale and in their communities, and to change their own lives, and others.

How? The goals of this Strategic Plan are:

- 1. Prioritize Programs With Impact**
- 2. Enable Effective Volunteer Leadership and Governance**
- 3. Globalize**
- 4. Communicate the AYA's Stories**
- 5. Set the AYA's Cultural Transformation on a Stable and Sustainable Footing**

Fully realized, this Strategic Plan will enable the AYA to achieve a comprehensive program of volunteer alumni leadership, engagement and service that consistently renews alumni interest in, and support, for the university. It will enable alumni to fulfill the university's vision of educating world citizens to transform their communities. And it will do all of that in an organizational and institutional setting that is financially and administratively sustainable.

That vision was built into the AYA's original Strategic Plan, and this Plan reaffirms it. Yale alumni will be acting on the world stage, participating with Yale and with each other in a flexible and dynamic range of alumni organizations complemented by the AYA with first-class strategic counseling and technology resources. The AYA and its affiliate organizations will partner with other Yale constituencies on campus, Yale interests beyond New Haven, and with both third-party non-profit partners and for-profit sponsors. The AYA will broadly and effectively communicate its vision and impact to alumni, students, the rest of the Yale community, and to interested audiences around the world. It will refine and implement standards for assessing programmatic priorities and outcomes and to achieve organizational and financial soundness for the full range of its activities.

The vision expressed in this Plan embodies the following signal value. It is incumbent upon a great university such as Yale to provide ways for alumni to find meaning in their relationships with the institution. What roles does Yale play in the lives of its graduates? Alumni will and should find their own paths. So long as Yale creates a rich environment for alumni to explore those paths, and so long as Yale nurtures that environment with resources commensurate with the ambition of its alumni to explore, then we – the AYA – are convinced that great things will happen, both at Yale and in the many communities that Yale alumni participate in.



Vision, Mission, and Ambition

Yale shares great gifts with the world: knowledge, inspiration, leadership, and service. Yale cultivates each of those elements through the Yale education, and its graduates carry their learning and experiences beyond the boundaries of the campus. Yale aims to have its students, for example, “develop their intellectual, moral, civic, and creative capacities to the fullest,” in the words of the mission statement of Yale College. Yale aims to have all members of the Yale community share their knowledge and capabilities with communities and individuals worldwide, through Yale’s teaching, research, and scholarship and through leadership and service by Yale faculty, students, and *graduates*. Yale and its graduates are powerful forces for addressing the many and diverse challenges facing the world and its populations.

This Strategic Plan is grounded on the premise that the gifts that Yale offers its students can be given again by its alumni. Yale alumni want to give. They want to lead. ***They want to serve.*** They want to shape their world and to serve Yale, fellow alumni, and people and communities who are in need. That ***call to service*** is a part of what defines them as Yale alumni and part of what has always defined Yale. Yale’s founding charter promised to train leaders “for church and civil state.” Nathan Hale, Yale College Class of 1773 expressed his wish “to be useful,” which he coupled with the admonition that “every kind of service necessary to the public good becomes honorable by being necessary.” That statement is carved into the stone of Harkness Tower.

The vision of the Association of Yale Alumni as a community of alumni dedicated to volunteer leadership and to service is therefore transformational, foundational, and traditional. This Strategic Plan focuses on connection and engagement to support and enhance this essential aspect of Yale, to enable Yale alumni to impact the world around them, to change lives at Yale and in their communities.

How?

First, by recognizing that Yale alumni have the knowledge, wisdom, experience, and creativity not just to participate in alumni activities but to initiate and lead significant elements of a mature alumni relations program. The role of the professional staff of the AYA should be to provide strategic counseling, partnerships, and technical infrastructure to

Expanding the frontiers of engagement, and calling alumni to service.

How are Yale alumni accountable for the education they receive?



alumni leaders. Yale alumni are current and future world, community, and local leaders. The AYA will support and enable alumni as volunteer leaders.

Second, by creating and providing opportunities for all alumni to engage with Yale via structures and tools that are convenient and meaningful – class organizations, regional associations, shared interest and identity groups, graduate and professional school associations, service initiatives, educational initiatives, virtual communities, and social outlets, and other avenues yet to be imagined. The AYA should be flexible and adaptable to meet alumni where and how they want to engage with Yale and on Yale’s behalf, in all the ways that they want to share their gifts as Yale graduates.

Third, by embracing the challenges and opportunities presented by the joint emergence of Yale’s global ambitions and the many and changing features of modern information technologies. The AYA will support alumni in the US and abroad, and online as well as in person.

Fourth, by aspiring to sustainable excellence in all facets of alumni relations, whether professional or volunteer, and including program development and delivery, communications, accountability, recruitment, promotion, and recognition of alumni relations professionals, and all volunteers, including volunteer leaders.

Fifth, by actively partnering with other alumni relations interests at Yale and with volunteer programs and opportunities beyond Yale, and by actively seeking to assist with and be benefitted by broader university initiatives. Collaboration produces impact efficiently and achieves multiplier effects.

Not only will Yale alumni strengthen the communities where Yale alumni live, but they will strengthen Yale, too, in both intangible and tangible ways. Yale’s impact on the world is made possible by the continuing impact of its graduates, by individuals fulfilling Yale’s ambition that they develop their capacities to the fullest. The AYA’s first Strategic Plan called Yale alumni to service as *Ambassadors for Yale*. This new Strategic Plan affirms the vision of that Plan then extends it and refines it. This Plan calls Yale alumni to serve as *Ambassadors in Action*.



A History of Alumni Relations at Yale

The AYA is a department of Yale University, with its own active and committed Board of Governors. Chartered in 1972 by the Yale Corporation, the AYA is the successor to a series of alumni relations organizations at Yale with roots in the founding of the Yale Alumni Board in 1906, the first regional Yale alumni association in 1864, and the first election of class officers for a group of Yale College graduates in 1792.

The AYA today is independent of the Yale Development Office and the Yale Alumni Fund, founded in 1890, which are departments of the university whose mission also focuses on alumni. Like the Development Office and the Alumni Fund, the AYA supports alumni giving. What alumni have to give, and want to give, is often not expressed only in dollars. It is also expressed in time and talent.

Under the first AYA Strategic Plan, titled “*Ambassadors for Yale*” and adopted in 2007, the Association of Yale Alumni has tried to transform the very idea of alumni relations. Alumni relations departments have been providing services to alumni, as inducements to get alumni to give money to *alma mater*. The AYA has added an important and essential dimension to that picture: calling alumni to service on behalf of Yale, through new opportunities and initiatives that meet alumni where they live, that connect and engage alumni as they want to, and that transform individuals and communities at the same time that they benefit Yale.

The first AYA Strategic Plan highlighted three key, emerging themes of the AYA’s work. First, the AYA acknowledged that growing numbers of Yale alumni expressed strong desires to engage with Yale not via traditional Yale College class organizations or regional Yale clubs, but instead via what the AYA has come to call “shared interest groups” and “shared identity groups” (both, “SIGs”), clusters of alumni organized around common contemporary interests or based on common activities as Yale students. Relatedly, graduates of Yale Graduate and professional schools were embraced as members of the AYA as never before. Second, the AYA challenged alumni to engage in service via their Yale identity, both *for* the university and *on behalf of* the university. Third, the AYA allocated staff resources more strategically than ever. The AYA supports both emerging initiatives related to SIGs and service and also traditional alumni relations, such as class-based reunions and regional Yale clubs, by targeting

Yale alumni as Ambassadors for Yale.

Strategic partnerships between volunteer leaders and professional staff.

An explosion of alumni engagement, grounded in shared values as well as in shared experience.



staff resources to communities where the largest numbers of Yale alumni are located and by supporting highly-engaged alumni volunteers as alumni leaders. Those themes were linked by a vision of Yale alumni changing the lives of those around them as well as giving back to Yale. In all, *“Ambassadors for Yale”* cultivated a new vision of alumni relations for university alumni, one defined by the related ideas of engagement, volunteerism, leadership, and impact. Yale alumni share not only a history but also a set of values.

“Ambassadors for Yale” was defined by a five-year time horizon. Those five years have passed quickly. The success of that plan is apparent:

- Considerable segments of AYA volunteer leadership and the AYA staff have been overhauled.
- Thirty-five new SIGs, many with volunteer boards and Strategic Plans of their own, have taken up key roles in the alumni landscape.
- Thousands of Yale alumni have been engaged in service initiatives coordinated by AYA volunteer leaders both in the US and abroad.
- The AYA staff provides strategic support for volunteer leaders, particularly in the cities where most Yale alumni live (so-called Yale “major cities”) and for SIGs, as well as ongoing support for traditional alumni organizations.
- YAANY, the new Yale Alumni Association of New York, produced or sponsored more than 80 events in 2011 for the 17,000 Yale alumni in the New York City area, complementing the strong program offered by the Yale Club of New York City.
- More than 250 Yale alumni, family and friends travelled to China in 2011 as part of volunteer-led Yale Alumni Service Corps (YASC) and Yale Global Alumni Leadership Exchange (YaleGALE) service trips, following earlier successful YASC and YaleGALE trips to Asia, Australia, Central and South America.
- Hundreds more YASC and YaleGALE leaders and volunteers traveled to Nicaragua, Israel, the United Kingdom, and Ghana in 2012.
- Thousands of Yale alumni and partner organizations have participated in Yale’s Global Day of Service since 2009.
- The Yale in Hollywood shared interest group has produced alumni conferences in Los Angeles, New York and Hong Kong for alumni in the entertainment industries.
- Participation in traditional alumni relations activities, such as class reunions, has expanded.
- Yale clubs in San Francisco and Los Angeles have been



renewed with new boards and strategic plans.

- Feb Club Emeritus, an annual social gathering of Yale alumni worldwide, now reaches thousands of alumni, on every continent, supported by a virtual community of volunteer alumni leaders in partnership with the AYA.
- More graduates of the Graduate School and Yale’s professional schools have been engaged and energized for and through Yale.

Core Values

The AYA is characterized by a transformative vision and entrepreneurial spirit across all of its programs. The AYA will continue to express the explicit message that its vision is based on the idea of gifts and sharing gifts, and its impact should be measured as much by dynamic *serial* reciprocity – gifts begetting gifts, volunteer leadership begetting further engagement and leadership – as by one-time outcomes.

AYA staff and volunteer leaders will be trained and supported in implementing a culture of “yes, and ...” in identifying new opportunities and responding to expressions of interest and concern from alumni, campus partners, and others. The spirit of “yes, and ...” does not mean unreservedly pursuing every possible opportunity that is presented to the AYA. Critical scrutiny is warranted and needed. Rather, the spirit of “yes, and ...” will offset and displace the relics of the spirit of the status quo, the premise that a new idea should not be pursued solely because it is new, too expensive, labor-intensive, or complicated.

The AYA is part of Yale. The vision expressed in this Plan embodies the idea, central to Yale itself, that it is incumbent upon a great university such as Yale to provide ways for its graduates to find meaning in their relationships with the institution. Meaning comes from many sources and is expressed in many ways. Alumni should find their own paths. So long as Yale creates a rich environment for alumni to explore those paths, and so long as Yale nurtures that environment with resources commensurate with the ambition of its alumni to explore, then we – the AYA – are convinced that great things will happen, both at Yale and in the many communities that Yale alumni participate in.



Measuring Success

The AYA recognizes that success never means the same thing in all contexts. Success may be measured by the number of participants. Success may be measured by depth of engagement. Success might be based on impact, and impact might be defined in terms of community impact, or impact on Yale, or otherwise. Success might be defined internally, by the extent to which an alumni program reinforces alumni relations itself, or externally, by the extent to which that program has “spillover” and/or “multiplier” effects on other aspects of the university, or other aspects of Yale, or the community beyond Yale. Financial, organizational, and administrative sustainability may be measures of success.

A key objective of this Plan is to begin to consider success metrics. How do we know when we have been successful through the efforts of the many alumni groups and associations engaged for and on behalf of Yale? Closely connected to the idea of success is the idea of accountability. Throughout this Plan, we have included wherever possible action steps, success metrics, and the identities of volunteers and staff accountable for both.

Documenting What the AYA Has Achieved, and What it Aims to Achieve, with Strategic Plans

This Strategic Plan includes numerous references to the transformation in alumni relations at Yale that is the goal of the AYA’s Strategic Plans. That transformation is documented more specifically in a series of attachments to this Plan. Attachment A summarizes the achievements of the first plan. Attachment B captures the changes in the AYA budgets, professional staff, and volunteer engagement over the last five years. Attachment B also includes benchmark data to illustrate how the AYA’s vision of alumni relations differs in practice from the vision that supports alumni relations programs at Yale’s peer institutions, reduced to their essences: professional staff and budgets. This Plan documents what tangible resources have produced so far at Yale and what further investment in alumni relations at Yale can produce in the future. Attachment C describes how the AYA plans to invest in itself, implementing sustainable strategies to finance achieving the goals described in this Strategic Plan.



The Updated Strategic Planning Process

This new Strategic Plan began with a meeting of the AYA Board of Governors in Beijing, China, in July 2011, concurrently with the visit to China of the Yale Global Alumni Leadership Exchange. Planning continued during AYA Board of Governors meetings in New Haven in September and November 2011 and February and April 2012; a Board of Governors retreat in June 2012; during brainstorming and planning sessions during the Fall of 2011 with the professional staff of the AYA; and with in-person and online surveys and brainstorming sessions with alumni volunteers in New Haven and around the world. Between September 2011 and February 2012, AYA staff and AYA Board of Governors members led more than 40 “listening sessions” with AYA Assembly delegates, reunion attendees, and Yale Club board members, SIG volunteers, and alumni volunteers in New Haven, New York, other AYA major cities, and elsewhere both in the US and abroad.

Alumni leaders and AYA staff were encouraged to produce specific “Big Idea” proposals for inclusion in the Plan as well as general themes and objectives. Many of those proposals, with corresponding staff and budget impacts, are included in this Plan in an Appendix. At appropriate points in the Plan itself, they are highlighted as specific examples of initiatives that implement the vision that the Plan embodies.

Transition: Budgeting for a Bridge Plan

Because of continuing deficits at Yale caused by the 2008 recession, this Plan assumes that there will be no additional staff or resources available to the AYA for FY13 and FY14. The possibility of additional funding beyond the second year is unknown. It is known that the AYA will experience additional funding reductions in 2014 and after, based on anticipated reduction in income linked to Yale’s sponsored credit card contract, expiration of a gift supporting the Yale Alumni Service Corps, and continued decline in class dues revenue. “Soft” support (non-budgeted) for several AYA staff positions and programs will expire in or after FY14.

The AYA is meeting its current obligations (not including any of the initiatives proposed in this plan) through a combination of University support and spending from its reserves. It can do this for the next couple of years. Beyond that, absent new revenue, it will have to make additional cuts in current staff

A comprehensive vision of the future of the AYA.

A realistic appraisal of budget and staff challenges.



and program funding.

That budget crisis affects this Plan in the following ways. Implementing all of the “Big Ideas” contributed by the Board of Governors and AYA staff in this current strategic planning process would require an estimated \$2.7 million in total additional program funding and an estimated 17 additional staff members. As a measure of how the recession has impacted Yale’s ability to support the AYA, that increase in staff would not even return the AYA to its 2008 staff levels.

With no additional resources, in significant respects identified in detail below, this plan includes a “transition” – a bridge plan – from the current strategic plan ending now, to that which might be imagined in two years given the possibility of attracting additional resources. Funding for the AYA will look very different in 2014.

During this transition, many of the Big Ideas identified in the planning process – such as the Innovators Fund, the Retirement Village, most of the marketing and communications initiatives, and most of the AYA’s international aspirations – will be put on hold. Several, like the Alumni College, can be launched with the understanding that they will have to be financially independent and self-sustaining, and largely volunteer driven *and* managed – that is, without staffing and funding from the University.

A two-page Transition Plan precedes the full Strategic Plan.

In order to achieve many of the goals recommended in this Plan, current staff support services and programming in the major cities, SIGs, and leadership development areas will need to be reassigned. Both the SIG and major city initiatives of the past five years have resulted in explosive growth. The AYA cannot sustain this level of activity even with its current staff and will have to scale back to only those major city and SIG programs of the highest priority.

Because the budget and financial aspects of the AYA are at such a critical juncture, a Finance Task Force of the AYA Board of Governors was appointed in April 2012 and undertook a thorough review of the AYA’s income and expenses, in the context of Yale’s overall budgeting process, in order to work aggressively toward a model of staff and volunteer leadership, balancing external (third-party) revenue and internal (Yale-supplied) revenue, that achieves the model of



sustainable impact described in the Plan, below. The report of that Task Force is attached to this Strategic Plan as Attachment C. The highest priority initiatives for financial impact described in that Report are:

1. Developing a program of corporate sponsorships for AYA programs.
2. Expanding the AYA's program of Leadership Forums including "knowledge management" leadership programs beyond the community of Yale alumni.
3. Growing the Yale Alumni College.
4. Building an AYA endowment.
5. Developing new business strategies for Yale Educational Travel.

Each of these is identified as a goal of this Strategic Plan, below.

Aspirations for a New Facility for the AYA

Alumni leaders and the staff of the AYA were nearly unanimous during the planning process in their support for expanded and modernized physical facilities on the Yale campus to serve alumni and support the programs and staff that constitute Yale's alumni relations efforts. Financing and building such a new facility is beyond the scope of this Strategic Plan, but it is explicitly part of the AYA's ambition.



A Guide to the Full Strategic Plan

This Strategic Plan contains both a vision of the AYA’s future and specific proposals and plans for implementation. Recognizing the AYA’s constrained budget environment, and bearing in mind the importance of a transition plan for the next two years, many of those proposals and plans are color-coded to indicate their level of near-term feasibility.

Many of the specific action steps and strategies for individual items are included in separate Big Ideas that are collected as an Appendix to this Plan.

Proposals coded in green [marked with a “+”] are already well-underway at the AYA in the existing resource environment, can be launched with a minimum of new resources, or will be self-funding.

Proposals coded in orange [marked with a “•”] require some incremental staff and/or financial support for launching and/or sustaining them. Resources might come from outside the AYA (supplemental to the AYA’s current resources) or might come from re-aligning current AYA resources. Implementing any of these will require judgments about their benefit/cost ratios, and the benefit/cost ratios of existing AYA initiatives. Tradeoffs will be required here.

Proposals coded in red [and marked with a “–”] are projects that require new incremental staff and/or financial support of such scope that launching them in the near term is not feasible. These are being deferred.



THE TRANSITION PLAN FOR THE NEXT TWO TO THREE YEARS: 2012 →

The following matrix sets out three tiers of program ambition for the AYA over the next two to five years. The three tiers correspond roughly to the description and assessment of the goals of the full Strategic Plan, and the matrix should be read in conjunction with the full Plan rather than as a stand-alone set of goals.

The first tier, marked with a green boundary and [+], identifies a level of programming that is possible in the short term, on the assumption that no incremental financial or staff resources will be available to the AYA. The first tier constitutes what this Strategic Plan refers to as the AYA “Transition Plan.”

The second tier, marked with an orange boundary and [•], identifies a level of programming that becomes available with the next [\$250,000 - \$500,000] of dedicated annual incremental revenue.

The third and final tier, marked with a red boundary and [--], represents full implementation of the goals of this Plan, which is estimated to cost [\$750,000 - \$1,000,000] in annual incremental revenue. The symbols reflect what is possible today, what may be possible in the intermediate term, and what is deferred today and is only possible in the long term.

The matrix is premised on the assumption that the only significant revenues acquired by the AYA are revenues provided either directly by one or more divisions at Yale or through dedicated internal support, such as endowment funds. Items in each of these categories may shift based on the acquisition of external support, gifts or sponsorships/partnerships, and/or proof of concept of a program’s being revenue-neutral or revenue-positive.

Every effort has been made below to align incremental increases in programming and alumni volunteer support with reasonable estimates of increased resource needs, particularly budget to support staff salaries and, where appropriate, travel.



**Goal One:
Prioritize Programs With Impact**

- + Focus on STAY, including leadership forums for students.
- + Domestic YASC
- + Leverage AYA staff as strategic consultants.
- + Manage staff travel.
- + Cross-pollinate existing clubs, classes, SIGs with service.
- + Conduct reunion pilots.
- + Alumni College to launch.
- + Alumni history projects.
- + Sustainability focus.

- Expand service initiatives domestically. [\$50K + 1 FTE]
 - Remote tutoring. [\$10K + .25 FTE]
 - Expand G&P support. [\$40K]
 - Faculty Corps. [1 FTE]
 - Book salon. [.25 FTE]
 - Knowledge management / Leadership Forums / consulting program. [\$25K]
 - Family-related and life stages programming. [\$50K + .5 FTE]
- Total incremental cost: [\$175K + 3 FTE (\$300K)]

- Expanded online learning. [\$0]
 - Residential learning. [\$15K + \$.5 FTE]
 - Retirement village. [In the millions....]
 - Angel fund / venture fund. [\$150K + .25 FTE]
 - Renewal weekend. [\$100K + .5 FTE]
 - Family Camp. [\$50K + 1 FTE]
- Total incremental cost: [\$315K + 2.25 FTE (\$225K)]

**Goal Two:
Globalize**

- + Construct global strategy and YET business plan.
- + Partner with IARU universities.
- + Make more strategic, efficient use of YaleGALE, YASC travel.
- + Use YaleGALE, YASC to make the case for foundation/corporate support.

- Restore growth for international service travel. [\$50K]
 - Support alumni constituencies abroad. [\$250K + 1FTE]
- Total incremental cost: [\$250K + 1FTE (\$100K)]
- Implement full global strategy. [\$150K + 1 FTE]
 - Strategize partnerships for revenue. [\$75K + 1 FTE]
 - Consider an international presence. [\$250K + 1 FTE]
- Total incremental cost: [\$475K + 3 FTE (\$300K)]

Goal Three:

- + Continue Volunteer Moves Management.
- + Leadership training and professional development for staff.



Enable Effective Volunteer Leadership and Governance

- + Limit Leadership Forums (5k / 6k per).
- + Encourage volunteers to convene technology, governance summits.
- Continue re-purposing and re-design of Assembly. [\$100K]
- Roll out Alumni Magnet. [\$300K + 1FTE]
- Total incremental cost: [\$400K + 1 FTE (\$100K)]
- Implement expanded Leadership Forums. [\$200K + 1FTE]
- Alumni advisory councils and boards. [\$100K + 1 FTE]
- Total incremental cost: [\$300K + 2 FTE (\$200K)]

**Goal Four:
Communicate the AYA’s Stories**

- + Maintain the AYA’s current communications and marketing plan.
- + Leverage volunteer peer-training for use of digital tools.
- Update suite of online resources and tools for distributing content. [\$50K]
- Staff support for analytics based on new campus-wide alumni database system. [\$25K + 1 FTE]
- Total incremental cost: [\$75K + 1 FTE (\$100K)]
- Engage in full branding strategy. [\$100K + .5 FTE]
- Develop suite of online apps and tools for volunteer engagement. [\$50K + .5 FTE]
- Total incremental cost: [\$150K + 1 FTE (\$100K)]

**Goal Five:
Set the AYA’s Cultural Transformation on a Stable and Sustainable Footing**

- + Develop accountability and success metrics.
- + Identify and share best practices in volunteer leadership and governance.
- + Support Volunteer Moves Management.
- + Examine opportunities for organizational and budget re-designs.
- Strategic support in place for partnerships, fundraising to support AYA programs. [\$100K + 1 FTE]
- Expanded awards/recognition programs. [\$25K +.25 FTE]
- Total incremental cost: [\$125K + 1.25 FTE (\$125K)]
- Supplement staff with new members sufficient to deploy in support of full AYA program, and with hard funding in place. [5 FTE (\$500K)]
- Expand G&P support [\$100K + 1 FTE (\$100K)]
- Total incremental cost: [\$100K + 6 FTE (\$600K)]



THE FULL PLAN: AMBASSADORS IN ACTION

Goal One: Prioritize Programs With Impact

This goal is the heart of this Strategic Plan, because it describes the many programs and initiatives to which volunteer energy will be devoted and through which the AYA's vision will be achieved. These efforts will be guided by an assessment of two things. First is impact, measured or evaluated in terms of a multiplier effect. A program or initiative is worth launching and pursuing in proportion to the sense that the resources committed to that program are felt, later, in multiples. A program that engages a modest number of alumni may be highly valuable if its impact is substantial. Second is benefit, measured or evaluated in terms of alumni themselves or in terms of the university's interests and goals. Impact may be felt at Yale or in New Haven. Impact may be felt elsewhere. In the best of worlds, AYA programs that have significant impact on the world at large will also benefit individual alumni and both benefit from and contribute directly to Yale.

1 Prioritize Programs With Impact

1.0 The AYA will continue to bring alumni together in ways, places, and times that multiply their impact on one another, on Yale, and on their communities. The goal, and the tool, is leverage.

- 1.0.1 The AYA will pioneer residential college reunions, building on the spirit, allegiance and sense of community envisioned when the colleges were established more than 70 years ago. We envision a reunion schedule that could generate as much excitement and engagement as the current class reunions.
- 1.0.2 The AYA will engage and partner with students – undergraduate, graduate and professional – to launch the Ivy League's first student alumni association.
- 1.0.3 The AYA will identify, cultivate and secure strategic partnerships with other volunteer-based nonprofit organizations to extend the impact of the AYA's service initiatives, including the Global Day of Service, the Yale Alumni Service Corps and the Yale Global Alumni Leadership Exchange. The AYA will prioritize partnerships with organizations that share the values expressed in this Strategic Plan, that offer complementary skills and resources, and whose participation does not draw further on AYA resources.
- 1.0.4 The AYA will identify domestic service sites for the Yale Alumni Service Corps, including opportunities and needs in New Haven and opportunities and needs presented by other alumni relations programs.
- 1.0.5 The AYA will work with classes to develop service initiatives for reunions, the Global Day of Service and the Yale Alumni Service Corps.



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- 1.0.6 The AYA will provide strategic support for SIGs that advocate for and support communities in need: programs addressing poverty, public health, arts education and other interests that align with Yale’s strategic priorities, such as sustainability and the environment.
- 1.0.7 The AYA will work with Classes, Clubs and SIGs to develop fundraising plans – including corporate sponsorships and crowdsourcing initiatives – to underwrite their strategic goals and objectives.
- 1.0.8 The AYA will provide seed funding and other support for alumni-developed initiatives, and vehicles for alumni to “crowdsource” support for those initiatives.
- 1.1 The AYA will support and engage Graduate and Professional School alumni as well as by Yale College alumni.**
- 1.2 The AYA will create and support innovative ways for alumni to pursue lifelong learning through Yale and with and from each other.**
 - 1.2.1 The AYA will partner with other campus constituencies who are developing resources for a Virtual Yale for alumni, creating access to teaching and learning resources.
 - 1.2.2 The AYA will re-institute development of a Fourth Century Forum / Renewal Weekend as envisioned in the AYA’s first Strategic Plan.
 - 1.2.3 The AYA will support alumni-led development of educational content for alumni, to be shared in-person and/or online.
 - 1.2.4 The AYA will re-institute development of an Alumni Residential College, for lifelong learning, complementary to the Directed Studies for Life program of the Yale College Dean’s Office.
- 1.3 The AYA will expand its leadership development initiatives.**
 - 1.3.1 Leadership development will include leadership development for students (Student Leadership Forums / SLFs) as well as for alumni volunteers (Emerging Leadership Forums / ELFs).
 - 1.3.2 Leadership development will include harnessing the time and talents of alumni leaders and Yale faculty to provide strategic consulting services to other alumni organizations and to Yale.
- 1.4 The AYA will institutionalize and leverage AYA memory, history, and tangible resources.**
 - 1.4.1 The AYA will develop a history of alumni relations, including alumni relations at Yale.
 - 1.4.2 The AYA will make its facilities accessible and welcoming to the campus community and to visiting alumni wherever possible, and will work to make the rest of the campus likewise accessible and welcoming to visiting alumni.



- 1.5 The AYA will develop and expand initiatives targeted to specific demographics and “life stages” parts of the alumni community.**
 - 1.5.1 The AYA will provide support for alumni-to-alumni and alumni-to-student career connections beyond the Yale Career Network, including the Graduate and Professional Schools where appropriate.
 - 1.5.2 The AYA will re-initiate development of programming for alumni with young families.
 - 1.5.3 The AYA will rethink and expand the Yale Career Network.
 - 1.5.4 The AYA will re-initiate development of a Yale Family Camp.
 - 1.5.5 The AYA will develop a strategy for development of an assisted living community / transitional living community in New Haven, targeted to Yale alumni and featuring abundant “cultural” and educational programming.

- 1.6 The AYA will ensure that all alumni programs, initiatives, and operations are conducted recognizing Yale’s emphasis on sustainability.**

- 1.7 The AYA will provide strategic and technical support and structures that enable all alumni to engage in support of and on behalf of Yale.**
 - 1.7.1 The AYA will make strategic planning support and technical support available to all Yale clubs, classes, and SIGs. This commitment, over time, aligns the character of the AYA’s support for major cities clubs and major SIGs with the character of the AYA’s support for smaller clubs and SIGs, classes, and other groups.
 - 1.7.2 The AYA will encourage staff, alumni and alumni constituencies to “cross-pollinate” for maximum impact and opportunities for engagement. Classes, clubs, SIGs, and graduate and professional school associations need not be siloed from one another in terms of leadership, program development and execution, or support from the AYA.



Goal Two: Globalize

It is the goal of President Levin and the Yale Corporation to position Yale as a global university of consequence through an increasing scope of research collaborations, teaching programs, international projects, and public engagement. Yale seeks to prepare its students for leadership and public service not simply for our nation, but for the world. The AYA will in turn support and engage alumni for leadership and public service for the world through international projects and public engagement.

In addition, while most of Yale’s alumni live in the United States, and most of the new SIG and AYA service programs have been focused here, a significant and growing number of Yale alumni live outside the US, and we must provide for their needs and expectations as well.

2 Globalize

2.0 The AYA will engage Yale alumni where they live, which means: worldwide.

- 2.0.1 The AYA will develop a comprehensive strategy for aligning its global impact and the interests of alumni worldwide – including initiatives such as YaleGALE, the Yale Alumni Service Corps, and Yale Educational Travel -- with other global impact programs at Yale, such as the Yale World Fellows Program, the Office of International Affairs, and the Jackson Institute.
- 2.0.2 The AYA will partner with alumni relations programs at IARU institutions and collaborate in the build-out of Yale / National University of Singapore from an alumni relations perspective.
- 2.0.3 The AYA will extend, institutionalize, and refine the Yale Global Alumni Leadership Exchange (YaleGALE), the Yale Alumni Service Corps (YASC), the World Alumni Leadership Conference launched by Yale in 2009, global features of the Bulldogs internship program for undergraduates, and the Yale Global Day of Service.
- 2.0.4 The AYA will develop collaborative programs to support alumni of International Association of Research Universities (IARU) members.
- 2.0.5 The AYA will enhance support for existing international Yale clubs and associations and will leverage technology tools, including social media, to enable alumni to participate in virtual and cross-border communities that are not geared solely to traditional geographic boundaries.
- 2.0.6 The AYA will produce international conferences and service trips for core alumni constituencies, such as SIGs and/or Yale College classes, and will support wherever feasible volunteer efforts to build fellowship and friendship through social as well as service activities.
- 2.0.7 The AYA will identify and develop a plan to work with corporate sponsors and partners both in the United States and at the global level.



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- 2.0.8 The AYA will develop new strategies for its global travel-education-service opportunities, including a business plan for Yale Educational Travel.

- 2.0.9 The AYA will explore supporting one or more permanent AYA presences in Asia as foundations for alumni volunteer leadership development and training at partner institutions, such as the National University of Singapore. The AYA will also explore possibility locating other AYA staff outside of New Haven.



Goal Three: Enable Effective Volunteer Leadership and Governance

Under the first Strategic Plan, the AYA’s Assembly / Board of Governors structure was revised and made more flexible to accommodate a greater number of delegates who do not come from the classic club/class/G&P background and to accommodate a greater number of volunteer leaders generally. In addition, with the launch of the AYA’s service programs and many new Shared Interest and Identity Groups, the number of governing boards and volunteer leaders serving on them expanded dramatically. Taken together, this represents an explosion of governance, and an enormous opportunity – and challenge – to organize these volunteer leaders and their successors in ways that maximize the effectiveness of the AYA.

3 Enable Effective Volunteer Leadership and Governance

3.0 The AYA will develop and implement staff organization and volunteer governance structures to support its mission effectively.

- 3.0.1 The AYA will ensure that the time and talent of volunteer leaders who are part of AYA governance are used wisely and effectively, and will use volunteer time on campus effectively, connecting volunteer leaders with Yale students and with Yale faculty wherever possible. The AYA should look to “double dip” with respect to volunteers, combining governance, program development and implementation, volunteer stewardship, and communications and marketing activities as part of combined efforts, meetings, or other activities.
- 3.0.2 The frequency, timing, location, and format of AYA Board of Governors and other governing body meetings will be examined.
- 3.0.3 The AYA will revisit the purpose and design of the meeting of the AYA Assembly.
- 3.0.4 The Assembly will be revitalized in its multiple roles: as a body of alumni leaders that consults with the Yale administration, embodies and leads the initiatives and programs of the AYA itself, and offers a vehicle for communication and consultation among alumni leaders themselves. The process of reconstructing the Assembly will be implemented as part of the in-person Assembly. Some may be implemented via new information technologies.
- 3.0.5 The AYA will develop a strategy to integrate the leadership development functions of the Assembly meeting with other leadership development forums and programs, including those taking place outside of New Haven. It will consider inviting and training delegates to the AYA Assembly to undertake greater roles in governance of alumni relations than simply attending the annual meeting. Support for that role can include implementing IT resources that facilitate greater delegate-to-delegate interaction year-round.
- 3.0.6 The AYA will develop and implement strategies for training, developing, and supporting volunteer leaders in ways that are consistent with the vision expressed in this Strategic Plan.



- 3.0.7 The AYA will provide professional development and leadership opportunities to its staff to ensure that AYA programs, initiatives and volunteers are effectively supported and that the AYA attracts and retains a top-quality team of professionals.

- 3.1 **The AYA will implement accessible, flexible, and scalable technological and social resource infrastructures appropriate to support the many programs and initiatives that comprise the AYA’s current scope and that comprise the aspirations reflected in this Plan.**
 - 3.1.1 The AYA will implement technology platforms that supply alumni volunteer leaders and AYA staff with appropriate and cost-effective tools, techniques, and capabilities to fully realize the vision expressed in this Plan.

 - 3.1.2 The AYA will implement platforms, technological and otherwise, that enable alumni volunteers, faculty, staff, and students, to identify themselves and each other as resources available for engaging in various AYA and alumni-led initiatives.

- 3.2 **The AYA will develop systematic and transparent relationships among the AYA Board of Governors and the governing boards and volunteer leaders of other significant AYA initiatives, including SIG boards and boards of service initiatives, to facilitate effective collaboration and, where appropriate, oversight.**



Goal Four: Communicate the AYA's Stories

Unrecognized impact is unrealized impact. The AYA has many great stories to tell about alumni engagement the results of that engagement. The AYA will identify those stories, identify the storytellers – who are, in many if not all cases, alumni themselves – and provide technical and strategic support to ensure that those stories reach their audiences. So much energy is directed to ensuring that the AYA and Yale alumni are leaders in the *action arenas* of service and learning. An equivalent amount of energy should be channeled to making the AYA and Yale alumni *thought leaders* with respect to that same effort. The AYA also serves as a major information conduit for alumni, with respect to university news, updates, events and programs, and with respect to matters concerning alumni themselves. The AYA, in partnership with the Office of Public Affairs and Communication, and the Yale Alumni Magazine, will work towards making access to this information *as easy as possible*.

4 Communicate the AYA's Stories

4.0 The AYA will both acquire and be a “brand,” not in a cynical marketing or advertising sense but in a productive, clarity-of-its-message sense, reflected in the content of AYA programs and performance of volunteers and staff as well as in explicit messages and graphic design and presentation. In broad terms, that message should be inclusive of broad themes – that the AYA is a resource, community, and platform for *all Yale alumni* – and focused themes – that the AYA is an active participant in carrying forward and executing Yale's mission to advance knowledge and improve society.

4.1 The AYA will develop a branding strategy to be implemented across all communications and marketing platforms and via all staff-supported AYA program initiatives, reflected in explicit messages and graphic design and presentation. That branding will be used within and across AYA initiatives to build trust and manage thematic similarity and programmatic differentiation.

4.2 The AYA will empower every volunteer leader and professional staff member to be a storyteller. That commitment signifies strategic support for volunteers and staff and collaboration with other university resources. To ensure coherent messages, we will rely on fewer yet bigger stories and themes, and seek coordination and effective technical support, access to university resources (such as the Digital Media Center) and to social media platforms.

4.2.1 The AYA will build a communications / marketing /storytelling component into every AYA volunteer initiative and leadership opportunity, building on relationships between volunteer leaders and professional staff members. That component may include specific messages and stories to highlight and distribute, or specific individual “ambassadors” tasked with storytelling connected to that initiative, or “ambassador toolkits” for individual alumni leaders to use, or a combination.

4.2.2 The AYA will extend strategic partnerships with the Yale Alumni Magazine and with Yale departments that have marketing and communications functions and/or



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strategies both on campus and off-campus, such as the Office of the Secretary and the Office of Public Affairs and Communications. These can include AYA participation in significant on-campus events, such as Commencement and Class Day, Freshman Convocation, and AYA volunteer liaisons to the residential colleges.

- 4.2.3 The AYA will be fully embedded in social media via a comprehensive suite of “apps” for hand-held devices and the abundant use of analytics to measure impact and outcomes. This may be accomplished in partnership with other social media resources already available to alumni, such as the JSTOR database provided through the University Library, resources for lifelong learning provided through iTunesU and OpenYale, and online archives and collections.
- 4.2.4 The AYA will implement and keep current a full suite of up-to-date online communications and organizing tools, beginning with a website that fully and adequately communicates to all alumni the length and breadth of AYA endeavors and the endeavors of AYA-supported and affiliated enterprises around the world, and including the effective use of short-form, volunteer- and professionally-produced video and film.

4.3 The AYA will implement effective self-help information technology (IT) tools for all alumni constituencies.

- 4.3.1 As in other areas of alumni programming, the role of the AYA will be to provide up-to-date elementary IT tools for volunteer use and strategic advising both regarding the use of more sophisticated tools. Where possible, local IT resources should be coordinated with AYA-based IT resources, particularly with respect to event planning and management, so that both the AYA and local Yale organizations can make the best use of available data.
- 4.3.2 The AYA will actively support sharing best practices among alumni constituencies. The AYA will be an IT “clearinghouse” for alumni constituencies, so that alumni organizations may rely on the AYA to help them learn what technologies alumni groups are effectively using, and to share that information with other alumni groups.
- 4.3.3 The AYA will collaborate with other campus constituencies and departments on the refinement, coordination, and where appropriate, strategic integration of alumni relations IT resources. Yale-related electronic and social media resources within OPAC, Development, Athletics, the AYA, Undergraduate Admissions, Yale College, and the various professional schools and the Graduate School all touch alumni directly. Career development resources at the AYA and at both graduate and undergraduate career services offices touch alumni directly. The university’s master alumni records database supports the AYA, Development, the Yale Alumni Magazine, and other functions.



Goal Five: Set the AYA’s Cultural Transformation on a Stable and Sustainable Footing

Execution of the AYA’s first Strategic Plan set in motion processes of volunteer cultivation and leadership, entrepreneurial thinking and behavior by alumni and staff, and impact within the alumni community and well-beyond. The AYA is committed to preserving, extending and institutionalizing these processes. The successes realized under that Plan have also put extraordinary stress on the organizational and financial resources of the AYA as a department of Yale, resources that already lagged behind those available to alumni relations organizations at Yale’s peer institutions. As a university department, the AYA has shared the burdens of budget reductions and reallocations across Yale as a whole. As a result, gaps in staff and budget resources that were apparent in 2007 have become striking in 2012. Consolidating, sustaining, and extending the AYA’s successes looking forward will require that the AYA obtain staffing and budget commitments, in partnership with Yale, that are commensurate first with Yale’s status as a world-leading university, second with the AYA’s successes to date, and third with the AYA’s continued ambitions.

5 Set the AYA’s Cultural Transformation on a Stable and Sustainable Footing

5.0 The AYA will re-affirm and institutionalize the best practices, values, and successes grounded in its original Strategic Plan.

- 5.0.1 The AYA will continue to direct staff resources to support volunteer leadership and strategic support of Yale regional associations in cities where a preponderance of Yale alumni live, in Shared Interest and Identity Groups, and in programs focused on alumni service, such as the Global Day of Service, the Yale Alumni Service Corps, and the Yale Global Alumni Leadership Exchange.
- 5.0.2 The AYA will continue to organize, support and lead programs focused on volunteer leadership and leadership development by and for alumni and future alumni – that is, students. The AYA will steward the precious time, talent and interest among Yale alumni, by existing leaders as well as by AYA staff, identifying interest and talent and matching it to opportunity.
- 5.0.3 The AYA will continue to seek opportunities for volunteer leadership within alumni relations, encouraging and recognizing volunteer entrepreneurship (new ideas, new initiatives, new volunteers, new partnerships), looking wide and deep into the body of alumni for time and talent, and ensuring that alumni with leadership interests are neither blocked out of participation because opportunities do not exist nor burned out by over-reliance on their efforts. This “leadership pipeline” is and will remain a key part of the AYA’s success.
- 5.0.4 The AYA will continue to build organizational and accountability structures to monitor and measure the progress of this Strategic Plan. The AYA will use metrics and measurement to identify quantitative successes. Qualitative measures are



equally important. Accountability and alignment measures will include refinement of the Volunteer Moves Management and related systems to identify new volunteer alumni leaders and resources, and construction of models to track expansion and extension of volunteer engagement across different AYA initiatives and across different forms of alumni engagement at Yale.

5.1 The AYA will continue to adopt and refine governance models that are flexible and adapted to the needs and goals of relevant alumni and campus and community partners.

5.1.1 The AYA will ensure that all volunteer alumni organizations within its purview – from Yale College classes to regional Yale associations to AYA service initiatives to Shared Interest and Identity Groups to the AYA Board of Governors to *ad hoc* alumni task forces – are governed by boards or teams of alumni leaders who, by role and by individual talent and interest, understand the organization’s goals and strategy and relationship to the umbrella goals of the AYA.

5.1.2 The AYA will construct Alumni Advisory Councils for specific subject matter within the AYA’s program areas. The Yale Blue Green initiative, for example, a Shared Interest Group focused on the environment, clean energy, and sustainability, may have an advisory council of alumni in addition to a governing board and alumni who actively plan and execute its activities.

5.1.3 The AYA will construct an Alumni Leadership Council, akin to the President’s Council on International Activities, as a corps of volunteer leaders who gather once a year to review the AYA’s status and progress.

5.2 The AYA will evaluate and assess new and continuing initiatives, including this Strategic Plan, on a regular, structured basis. It will hold itself accountable.

5.2.1 The AYA will develop schemas, within the framework of this Strategic Plan, to help both alumni volunteers and professional staff determine whether pursuing new opportunities is consistent with the AYA’s vision, mission, and resources.

5.2.2 The AYA will use periodic goal setting and report cards, both within the staff and among alumni volunteers, to measure progress and success.

5.2.3 The AYA will be continue to be flexible in designing its internal organization and in managing its budget to align its professional operations, in a disciplined way, with the needs, interests, goals, and talents of alumni and alumni volunteers.

5.3 The AYA will continue to celebrate, recognize, and honor the volunteers, staff, and partners who create and contribute to its success.

5.3.1 The AYA will continue to recognize alumni, faculty, staff, and others through existing programs: the AYA Leadership Awards for outstanding individual volunteer leaders, selected by the AYA staff; the Excellence Awards for outstanding alumni organizations, selected by the AYA Board of Governors; the Yale Medal, for



outstanding service to Yale, selected by the AYA Board of Governors.

5.3.2 The AYA will inaugurate additional awards programs to recognize members of the Yale community, and prospective members of the Yale community, who exemplify the AYA's culture of service. These will include awards to outstanding high school students, in partnership with the Admissions Office, to recognize leadership in the area of community service; awards to outstanding faculty partners of the AYA; and awards to outstanding alumni who engage in volunteer service beyond the umbrella of AYA programs.

5.3.3 The AYA will inaugurate a faculty awards program to recognize the outstanding contributions of faculty in the service of alumni programming.

5.4 The AYA will establish a sound and coherent organizational and financial model within the framework of the university as a whole.

5.4.1 The AYA will obtain clarity regarding its ability to pursue donors and development goals on its own behalf, within the university's development goals as a whole.

5.4.2 The AYA will pursue opportunities for corporate sponsorships and partnerships, where feasible and appropriate.

5.4.3 In order to enable Yale College classes to realize the full benefit of class members' financial contributions to their classes and to Yale, the AYA will collaborate with the university on a thoughtful re-organization of the alumni dues system, financing of class reunions, and support for the Yale Alumni Magazine.

5.4.4 The AYA will seek additional funding for staff positions to bring both the levels of professional staff and AYA operating budgets up to levels documented by benchmarking studies of alumni relations organizations at Yale's peer institutions.



Attachment A:

Major Accomplishments of “Ambassadors for Yale”

AYA STRATEGIC PLAN APRIL 2007 – APRIL 2012

Prepared April 2012 by Mark Dollhopf and Michael Madison

Introduction

The AYA launched a strategic planning process in July of 2006. On April 19, 2007 the AYA Board of Governors adopted “Ambassadors for Yale”, the first formal strategic plan for the future of the AYA. Although there was no time horizon for the plan, it was assumed that three to five years would be the expected timeline. April 2012 represents the end of a five year cycle and it was the recommendation of the AYA Board of Governors to launch a new plan for the next five years. The first step in launching a new plan is reviewing and evaluating the current plan - taking stock of what has been accomplished:

Major Accomplishments

First and foremost: There are more alumni doing more things – taking initiative and driving AYA programs – in a leveraging of alumni talent and drive like never before. Feb Club Emeritus, YaleGALE, Yale Alumni Service Corp, the shared identity groups, the major cities – all are examples of our aspiration that alumni engagement be “volunteer driven; staff managed.”

Following is a review of some of our most significant accomplishments over the last five years:

Major Cities

- Lifted annual attendance at events in major cities events from 2,506 to 23,873.
- Strategic plans in place for all major cities except Washington DC
- New strategic partnership with Yale Club of New York City – reciprocal board positions
- Yale Club of New York City sponsorship of events – Welcome to New York; Day of Service Reception; IARU events: IARU Presidents Reception; Support for SIGs; Expanded Class lunches
- Revitalized (phoenix-like) Yale Alumni Association of New York (YAANY) – from 7 events with 515 attendees in 2008 to 80 events with 4,489 in 2011.
- Depth and breadth metrics implemented
- Partnerships and collaborations with SIGs.

Major Cities by the numbers:

Number of events...	
2008.....	90
2011.....	385
Number of attendees...	
2008.....	2,506
2011.....	23,873



Shared Interest Groups

35 new SIG alumni associations in the past five years including:

- Yale Black Alumni Association (YBAA)
- Yale Latino Alumni Association (YLAA)
- Association of Asian American Yale Alumni (AAAYA)
- Yale GALA (not new, existing)
- Yale Arab Alumni Association (YAAA)
- Eli’s Mishpacha – Yale Jewish Alumni Group
- Association of Native Americans at Yale (ANAAY)
- YaleWomen
- Yale Veterans Association
- Yale Alumni Nonprofit Alliance
- Also for a number of student affiliated groups, including Yale Debate Association, Yale Political Union Alumni Association, Duke’s Men Alumni, Society of Orpheus and Bacchus Alumni, New Blue Alumni Association, et al.
- Strategic plans in place for most shared identity groups.

Service by the numbers:

Participants in Day of Service...	
2008 (Pilot).....	348
2011.....	4,058

Cumulative YASC Participants	
Yale Alumni Service Corp	
2008.....	117
2011.....	889

- 11 identity groups
- 13 senior society groups
- 13 singing alumni groups
- 19 sports alumni groups

SIG Reunions and Events

- 38 events with 3,056 attendees in 2008 to 283 events with 10,067 attendees in 2011 (not including athletic alumni associations or senior societies).
- Reunions staged for YLAA (two), YBAA, Yale GALA, ANAAY and YaleWomen
- Yale in Hollywood Conferences – Hollywood, New York and Hong Kong
- Yale Alumni in Real Estate Conferences (supported by Development Office) – four conferences to date
- Yale Alumni in Energy (supported by Development Office) – three conferences

SIG events by the numbers:

SIG* events...	
2008 (est.).....	38
2011.....	283

SIG* event attendees...	
2008 (est.).....	3,056
2011.....	10,067

* Does not include athletic groups or senior societies

Strategic Planning

Emphasis on mission/strategic planning – “If Yale’s mission is to train world leaders, then how are our communities changed because Yale alumni live there?”

- Strategic planning retreats held for all major cities
- Retreats held for all major SIG (identity) groups
- Retreats held for three second tier cities – Baltimore, Raleigh Durham, and Pittsburgh
- All Ivy retreats held in Atlanta, Denver, and San Francisco (LGBT leaders)
- Every leadership forum has sessions on strategic planning and change management.



Service

Call to Service – “From merely providing services to alumni to calling alumni to service.”

- Global Day of Service – average attendance is ~4,000 at 250 sites(nearly 250 partnering nonprofit associations) in 40 states and 12 countries
- Yale Alumni Service Corps – 7 service tours to date with over 600 participants, board of directors created
- Global Volunteer Leadership Forum staged September 2011
- Ongoing community service projects – many Clubs and SIGs now have ongoing year round projects such as “Summer in the Arts” and sponsored by the YBAA.

Globalization of the AYA

- Yale Global Alumni Leadership Exchange YaleGALE – five trips to five countries and 27 universities, 358 cumulative participants
- World Alumni Leadership Conference – three (including UMIC pilot in Japan, Istanbul and Beijing) with over 100 universities participating
- IARU Alumni Association – Yale initiated in New Haven three “summits” to date (New Haven, Cambridge, and Singapore) of IARU alumni directors
- Greater New York IARU Steering Committee – two years, four major events, 300 participants
- IARU Alumni College – under development, pilot project in Cambridge
- International university representatives attending AYA Assembly including University of Tokyo, Monterrey Tec, Koç, Sun Yat Sen and numerous others
- AYA Board of Governor Retreats Abroad – Beijing in 2011

Worldwide Feb Club by the numbers:

Feb Club Parties...	
2008 (Pilot).....	34
2011.....	100
Feb Club Attendees	
2008.....	3,300
2011.....	6,000

Volunteer Leadership

Leadership Development – “How do we get from good to great?”

- Leadership Forums – nearly 500 volunteers trained to date
- Strategic Planning Pep Rallies – 8 events staged, over 800 in attendance
- Emerging Leaders Forums- pilot launched in Chicago, 5 events staged, 251 in attendance

Volunteer Moves Management - “From managing of events to managing of volunteers”

- 750 alumni leaders profiled and under active management

Volunteer Recognition – new stewardship initiatives

- AYA Leadership Awards for Volunteer Innovation and Service for outstanding individual service to the Yale Alumni Association
- AYA Board of Governors Excellence Awards *for superior accomplishment among AYA-affiliated alumni associations*



Governance

Changes in AYA Governance:

- Creation of Executive Committee with regular pre-board strategy meetings
- “Successor” board members – two chosen per year
- New committee and task force structure – from 24 committee members of the board to nearly 200, including subsidiary boards for YaleGALE, YASC, Major Cities “Roundtable” and Bulldogs Across America
- New board election process – from in person voting to online
- New model of delegate representation – from delegates chosen to represent classes, clubs and SIGs to ex officio representation of class, club and SIG officers.
- Moved to four board meetings per year including orientation