

**College of Health and Human
Development Alumni Society
2017-2021
Strategic Plan**



PennState
College of Health and
Human Development

Executive Summary

On March 25 and 26, 2017, eight members of the College of Health and Human Development Alumni Society Board of Directors and three ex-officio members met at Penn State's University Park campus to draft the Board's 2017-2020 Strategic Plan. The participants were:

- David McClung, President
- Jeff Sarabok, Past President
- April Judy, President-Elect
- Doris Golebiewski, APG Committee Chair
- Joe Hughes, At-Large Executive Committee member
- Jason Bayona, invited strategic planning member
- Sam Bernstine, invited strategic planning member
- Vic Gladstone, invited strategic planning member
- Nan Crouter, Dean, College of Health and Human Development
- Abby Diehl, Assistant Dean for Alumni Relations and Special Projects, College of Health and Human Development
- Kristi Stoehr, Assistant Director of Alumni Relations, College of Health and Human Development

Background

First, the planning committee members examined the results of a SWOT Analysis that was completed by members of the HHD Alumni Society Board. Some of the responses, by category, included:

Strengths

Items cited as strengths of the Board were strong leadership from Board leaders; the Mentoring Program; support from the Dean and other College staff; a robust alumni network; engaged, dedicated Board members; and Board members' collaboration with each other and with the College.

Weaknesses

Weaknesses of the Board, as cited by Board members, include lack of diversity on the Board; lack of clarity of the Board's mission; certain aspects of Board meetings, including limited time for strategic discussions, lack of clarity of the role of a Board member, and lack of communication by Board leaders in between meetings.

Opportunities

Board members cited opportunities such as capitalizing on the College's interdisciplinary nature; engaging with undergraduate and graduate students; team building and networking among Board members; utilization/engagement of Petersen Society members; interaction with HHD World Campus students and alumni; and the new campaign.

Threats

Threats to the Board included uncertainty of government support and regulations that could adversely affect Penn State; lack of knowledge of the APGs and Board by both students and alumni; changing demographics of Board members; and difficulty obtaining participation in some alumni activities by Board members.

Vision and Mission

Vision Statement

“The vision of the Board of Directors of the Alumni Society of the College of Health and Human Development is to facilitate the college’s pursuit of excellence in improving human health, development, and quality of life throughout the lifespan.”

Mission Statement

“The mission of the Board of Directors of the Alumni Society of the College of Health and Human Development is to promote the engagement and interaction of alumni with students, faculty, staff, and fellow alumni through innovative programs and activities.”

Goals

The participants reviewed the current, 2014-2017 plan, the main goals of which are:

Goal 1 – Refine existing programs that support the vision and mission of the Board;

Goal 2 – Create new and innovative programs consistent with the vision and mission of the Board;

Goal 3 – Enhance the sustainability of the Affiliate Program Groups (APGs) through enhanced processes and relationships;

Goal 4 – Affirm alumni support of, and connection to, the college and the University via development and membership initiatives;

Goal 5 – Support the College of Nursing (CON) in developing its own alumni relations programs and engagement strategies.

Next, the participants created goals for the new, 2017-2021 plan, which are as follows:

Goal 1 – Create and implement new and innovative programs consistent with the vision and mission of the Board;

Goal 2 – Enhance existing programs that fulfill the Board’s mission;

Goal 3 – Enhance the sustainability of the Affiliate Program Groups (APGs) by strengthening processes and relationships;

Goal 4 – Affirm alumni support of, and connection to, the college and the University via development initiatives;

Goal 5 – Continuously improve the Board through enhanced connections and communication.

The plan that follows provides strategic actions for each goal, describes each of these strategic actions in greater detail, and assigns “measures of success” to each action. These measures of success will enable the Board to monitor its progress for each of the strategic actions.

2017-2021 Strategic Plan

Goal 1 – Create and implement new and innovative programs consistent with the vision and mission of the Board.

Strategic Action 1a. Engage parents by providing them with resources for discovering the majors in the college and opportunities for their students to interact with alumni.

Parent engagement is a relatively new realm for Penn State. The Division of Student Affairs has a Parents Council and Penn State has, in recent years, launched a parent philanthropy program. More recently, the College of Health and Human Development has begun communicating directly with parents.

Parents often inquire about the career opportunities available to their students in the College of Health and Human Development. The HHD Alumni Society Board recognizes the value in communicating with parents about their students' education and about opportunities for students to interact with alumni. The first formal effort to provide information to parents came in the fall of 2016, when the HHD Office of Alumni Relations partnered with Candid Careers to film 13 videos, which feature alumni discussing various aspects of their careers. These videos are a good resource for parents who want to know what someone can do with a degree in a particular major.

Measures of success

1. Alumni will attend the college's annual ice cream social during Parents & Families Weekend and interact with parents/families. Ideally, alumni representing an array of majors in the college will attend.
2. The Board will endorse and support the Office of Alumni Relations' effort to expand upon the number of alumni career videos via Candid Careers and to post these to relevant HHD websites.

Strategic Action 1b. Develop a set of initiatives to engage recent alumni.

Young alumni engagement is a relatively recent trend in alumni relations efforts, particularly at Penn State. The university is realizing that a fairly large percentage of alumni have graduated in the past ten years and that the best way to ensure lifelong engagement is to ensure continuity of engagement over the course of an alum's life. In the College of Health and Human Development, alumni ages 29 and younger comprise 18 percent of the total population of HHD alumni.

Measures of success

1. The executive committee of the Board will identify a cadre of recent alumni to serve on a young alumni council or committee. The committee will be charged with the following:
 - a. Benchmarking with other University Park colleges and with other universities around the country about their efforts to engage recent alumni;

- b. Recommending a recent alumni engagement strategy for the duration of the strategic plan to include both communications and programming efforts.
2. Following the council's recommendations, the Board and the Office of Alumni Relations will review the recommendations and determine which strategies will be implemented.
3. Through regular reports by the Office of Alumni Relations, the Board will remain apprised of the Penn State Alumni Association's efforts to engage recent alumni as set forth in its strategic plan, *Vision 2020*: "2.1.1: Specifically develop engagement strategies that engage young alumni" and identify collaborative opportunities where relevant.

Strategic Action 1c. Create a sense of home for World Campus alumni and students by developing an event or program targeting them.

The College now has three bachelor's degree programs on the World Campus (Biobehavioral Health, Health Policy and Administration, and Human Development and Family Studies) and two graduate degree programs (Master of Health Administration, or eMHA, and Master of Professional Studies in Nutritional Sciences). As the number of graduates of these programs continues to grow, it becomes essential for the Alumni Society to reach out to these graduates.

It is also important for the Board to include students in HHD World Campus programs in its student engagement activities where possible. Because graduates of HHD World Campus programs are considered to be HHD alumni just as graduates of residential programs are, the Board must engage them as students so that they can benefit from these programs and so they want to remain engaged as alumni.

Measures of success

1. The Board will arrange a virtual panel discussion of World Campus students, during a board meeting, to find out what kinds of interactions these students would benefit from.
2. The Board (to include the careers committee and/or APGs) will livestream at least one alumni event per year for World Campus students during the life of the plan. Events could include alumni panel discussions or the Distinguished Alumni Speaker Series.
3. The Board will seek to enhance engagement among World Campus alumni by:
 - a. Adding at least three World Campus alumni to the nominations committee's list of potential board members by January 2019, and then at least one per year in subsequent years;
 - b. Encouraging APGs that have World Campus graduates to promote involvement opportunities/APG board membership to these graduates (ongoing);
 - c. Requesting that Board committees consider World Campus alumni when identifying alumni for participation in alumni-student events and alumni in the classroom events or identifying award nominees (ongoing).

Goal 2 – Enhance existing programs that fulfill the Board’s mission.

Strategic Action 2a. Continue and expand upon existing regional HHD alumni events.

In the previous strategic plan, the Board established “road events” in areas with high concentrations of alumni for the purpose of engaging with alumni in their own communities. In the first such effort, HHD partnered with the Alumni Association on a 2015 “City Lights” event at the Italian Market in Philadelphia that featured Hospitality Management faculty member Peter Bordi. In February 2017, the college sponsored an “Evening with the Dean” event in New York City, which was attended by approximately 50 alumni and friends. Events already underway for the time period of this plan include a fall 2017 event in northern Virginia and a spring 2018 event in the Lehigh Valley area.

In addition, the college has begun partnering with the Alumni Travel Office at the Penn State Alumni Association to offer alumni tours. The first two of these, both “Wolves of Yellowstone” tours, were held in January and February 2017 and were hosted by two Recreation, Park, and Tourism Management faculty. Additional alumni tours are being planned, including a tour that will intersect with an HHD/Arts & Architecture study abroad program in Tanzania. This innovative concept is new to Penn State and allows HHD to once again be a pioneer in alumni programming.

Measures of success

1. The Board will work with the Office of Alumni Relations, the Dean’s Office, and relevant Penn State Alumni Association chapters and groups to offer at least two regional alumni events per calendar year during the life of the plan.
2. The Board, working with the Office of Alumni Relations, will partner with the Penn State Alumni Association to offer at least one alumni tour hosted by an HHD faculty member in each year of this plan.

Strategic Action 2b. Expand mentoring opportunities for alumni and students.

The HHD Mentoring Program is the largest at University Park in terms of alumni and student enrollment and has been in existence for 15 years. During the time period of the previous strategic plan, the program was expanded to include Master of Health Administration (MHA) students and alumni. In addition, the college is currently participating in a pilot program to test alumni-to-alumni virtual mentoring using an online platform called PeopleGrove.

Measures of success

1. The Careers Committee of the Board will work with the Office of Alumni Relations to identify a graduate degree program to which to expand the Mentoring Program. This new program will begin in the 2018-19 academic year.
2. When the PeopleGrove pilot concludes in June 2017, the program will be evaluated to determine whether (1) there is interest in alumni-to-alumni mentoring, (2) PeopleGrove is an effective platform to deliver this type of mentoring, (3) the program is financially

viable, and (4) existing HHD mentoring programs might benefit from a virtual component. A report will be presented to the Board at its fall 2017 meeting.

Strategic Action 2c. Invigorate the Petersen Society through meaningful engagement opportunities.

Engagement with past Board members, who comprise the Petersen Society, was an element of the previous strategic plan, but this element was not accomplished due to time constraints.

Measures of success

1. In early fall 2017, Petersen Society members will be surveyed regarding the ways in which, and the extent to which, they would like to be involved.
2. At the fall 2017 meeting, the Office of Alumni Relations will provide a survey report to the executive committee of the board.
3. In spring 2018, the Office of Alumni Relations will provide to the executive committee a list of strategies for engaging Petersen Society members via special and ongoing initiatives.

Goal 3 – Enhance the sustainability of the Affiliate Program Groups (APGs) by strengthening processes and relationships.

Strategic Action 3a. Enhance APGs’ recruitment and succession planning.

Historically, the most successful, cohesive, and consistent APGs are those that have a pool of volunteer leaders from which to draw and that have a clear succession plan in place. Some APGs have struggled to fill officer positions or to recruit board members. The APG committee chair and assistant director of alumni relations will work with the APGs to help them establish clear plans for succession planning and board member recruitment, as well as to help them on-board members so that expectations/roles are clear.

Measures of success

1. During the 2017-18 academic year, the APG committee chair and assistant director of alumni relations will benchmark with colleges within Penn State and with other non-Penn State alumni organizations to determine best practices for board member recruitment and succession planning.
2. In fall 2017, a task force, with a representative from the nominations committee, will be created to examine board recruitment and succession planning and make recommendations to the APGs regarding best practices.
3. A report regarding recruitment and succession planning will be presented to the APGs in fall 2018.

Strategic Action 3b. Create a task force to make recommendations about optimal meeting practices for APGs.

APGs generally meet via conference call on a monthly basis. Several APGs hold annual alumni events on campus, but only one (the Penn State Hotel & Restaurant Society) holds regular meetings on campus. A task force will be created to (1) explore the benefits and drawbacks of different meeting types (conference calls, in-person, videoconference) and to make recommendations for APG meeting practices.

Measures of success

1. During summer 2017, the APG committee chair and assistant director of alumni relations will communicate with the APG presidents about annual meeting planning and receive feedback.
2. During fall 2017, the APG committee chair will appoint a task force to review the feedback and make recommendations.
3. Recommendations will be given to APG presidents in spring 2018 prior to the Board meeting, and then to the full Board at its spring meeting.

Strategic Action 3c. Pilot a training/teambuilding event for APG leaders and APG board members.

APG leaders would benefit from more support and information regarding effective programming, engagement with students, the basics of planning events, and more. Training events in the past have been well received but they have been shorter in duration. A training event could be modeled after the Penn State Alumni Association's Alumni Leadership Connections (ALC) volunteer training events and would offer APG officers and board members the opportunity to 1) share best practices, 2) learn about HHD and PSAA alumni activities, 3) think strategically about the direction of their APGs, 4) receive tips/troubleshooting ideas with regard to particularly vexing issues, and 5) network with other alumni.

Measures of success

1. A planning committee composed of current and former APG leaders and alumni staff will be appointed by the executive committee during summer 2017 and will meet during fall 2017 to plan the first training event.
2. The first training event will take place during spring 2018.

Strategic Action 3d. Provide the APGs with a consistent, updated set of best practices and resources to facilitate their success.

To be successful, APGs need support from the HHD Office of Alumni Relations and from their academic units, access to best practices and creative alumni engagement/programming ideas, and information about current activities and priorities in the college.

Measures of success

1. The HHD Office of Alumni Relations will create and distribute an electronic newsletter, on at least a bi-monthly basis, to APG boards beginning in fall 2017.
2. Each APG president will work with the assistant director of alumni relations and the academic unit head to ensure that the APG has a faculty liaison within the department who 1) participates in APG meetings, 2) consults with the APG about ways in which the APG can assist the department, and 3) helps to promote the APG and its activities to faculty and students in his/her unit.
3. In spring 2018, a working group will be appointed to review the APG leaders' guide, make revisions where appropriate, and incorporate into the document a set of core best practices for running an APG.
4. The updated document will be presented to the full Board at its fall 2018 meeting.
5. During the 2017-18 academic year, the HHD Office of Alumni Relations and the Dean will develop a training, or a series of trainings, for academic unit heads about working with APGs.

Goal 4 – Affirm alumni support of, and connection to, the college and the University via development initiatives.

Strategic Action 4a. Achieve 100 percent participation in giving to the college among Board members.

Achieving 100 percent participation in giving among Board members has been a longstanding goal. When approaching prospective donors, it is helpful for development staff to be able to say that Board members support the college and are invested in its mission. One hundred percent participation has been achieved in some years but not in others.

Measures of success

1. The development committee of the Board will work with Development staff on a plan to communicate the 100 percent participation goal with Board members throughout the year.
2. The nominations committee of the Board will continue to inform prospective Board members of the 100 percent participation goal and the expectation that Board members make a gift each year during their term.
3. The development committee will report progress toward the 100 percent participation goal at the fall and spring Board meetings, and will report the results of the initiative to the Board at the conclusion of each fiscal year.

Strategic Action 4b. Target a specific development initiative for Board member giving.

The Board has created or endorsed several development initiatives in the past, including the Student Professional Development Endowment, the Alumni Board Honors Scholarship, and the Life Promise Award. The new campaign, *A Greater Penn State for 21st Century Excellence*, provides an opportunity for the Board to revisit the concept of a Board-endorsed development initiative. This could be an initiative (program, scholarship, etc.) to which Board members could simply make gifts, or it could be an initiative for which the Board actively raises funds.

Measures of success

1. During fall 2017, the development committee will work with its development staff liaison to generate ideas for development initiatives.
2. A proposed initiative or set of initiatives will be presented to the full Board at its spring 2018 meeting.
3. Once a particular initiative is approved, the development committee and the development liaison will develop a plan/timeline for raising funds.

Strategic Action 4c. Connect the Board with the HHD Philanthropy Council.

The HHD Philanthropy Council was created to assist the dean in creating a “culture of philanthropic leadership;” making connections to prospects, donors, and corporate partners;

providing advice regarding campaign initiatives; and contributing financial support. The Council has organized itself into several subcommittees – including Recent Alumni, Parents, Industry, and Stewardship – that are also relevant to the Board’s activities and mission. Because of these joint interests, it makes sense to have a connection between the two groups in order to coordinate efforts and share ideas.

Measures of success

1. The President of the Board or a designee will serve as an ex officio member of the Philanthropy Council and will attend all Philanthropy Council meetings during the life of the plan.
2. Following each Philanthropy Council meeting, the President will report to the executive committee on relevant discussions/actions that were undertaken and recommend Board action if relevant.

Goal 5 – Continuously improve the Board through enhanced connections and communication.

Strategic Action 5a. Infuse student perspectives into elements of the Board’s meetings.

The Board has a history of commitment to students, sponsoring career events for students in conjunction with each Board meeting, presenting awards to students, and inviting students to participate in discussions during Board meetings. The Board would like to take this commitment to the next level by identifying ways to more systematically infuse student perspectives into its discussions and planning.

Measures of success

1. During its fall 2017 meeting, the Board will discuss having a student representative or representatives on the Board and determine the details of this representation.
2. A working group or existing committee of the Board will establish a process by which student(s) can apply or be nominated or appointed to serve on the Board.
3. The first representative(s) for the 2018-19 academic year will be selected during spring semester 2018.

Strategic Action 5b. Increase the Board’s connection to department leaders.

The success of the Board’s programs and activities depends upon investment by the College; namely, the dean, associate deans, department heads, and undergraduate and graduate professors-in-charge (PICs). Department heads and PICs, in particular, can set the tone regarding the importance of alumni engagement. Historically, the most successful APGs are the ones that have the deepest connection with their affiliated department or school, and the departments with the highest student attendance at alumni events are the ones where faculty emphasize the importance of making connections with alumni. The success of this plan, in part, depends upon the Board’s ability to strengthen its relationship with the academic units.

Measures of success

1. The assistant dean for alumni relations and special projects will give an alumni report at least twice a year at meetings of the college’s executive committee.
2. The assistant dean for alumni relations and special projects will communicate with PICs at least once per semester about Board activities and ways in which the academic units can support them.

Strategic Action 5c. Maintain commitment to diversity and inclusion on the Board.

The Board has a systematic, rigorous nominations process. As part of this process, the nominations committee reviews the current demographic profile of HHD Alumni Society members and of the current Board to ensure that the Board’s composition reflects the Alumni

Society's composition. The committee considers class year, major, race and ethnicity, and gender when determining each slate of candidates.

Measures of success

1. Once per year during the life of this plan, the nominations committee will reach out to department heads and ask them to ask their faculty to recommend prospective Board members, with particular emphasis on alumni from racially and ethnically underrepresented groups.
2. The careers committee will ensure that diversity in terms of major, class year, and race/ethnicity is a factor in its selection of alumni participants in career panels and other programs.
3. The Board will achieve an upward trend in the percentage of Board members from underrepresented races/ethnicities over the course of the plan.

Strategic Action 5d. Enhance the on-boarding and continuing socialization of Board members.

The nominations committee conveys a consistent set of messages to prospective Board members, and the executive committee conducts a robust orientation presentation/discussion at new Board members' first meetings. Still, some Board members have expressed that it takes a full term for them to have a comprehensive understanding of the Board, or that it takes quite some time to feel fully integrated into the Board. The Board would like to broaden its efforts to engage its members and educate them about their roles and about the college.

Measures of success

1. Each Board member will give a brief introduction at the beginning of each fall meeting of the Board.
2. By the fall 2017 meeting, the Office of Alumni Relations will create an enhanced directory that includes Board member photos along with bullet points about who they are.
3. The president will provide a biannual update to the Board via email. This update will occur at the mid-point between Board meetings.
4. The dean's annual "State of the College" address will be distributed to the Board, either as a video or a PowerPoint presentation.