



**Alumni Professionals of Texas**



January 30 - February 1, 2011



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Dear Alumni Professionals:

Thank you for attending the Alumni Professionals of Texas Annual Conference in Nacogdoches, Texas. There are many new faces this year at APT; for those of you attending for the first time, we welcome you to the organization. APT is a non-membership association of alumni relations professionals in Texas and a handful of colleagues from surrounding states who come together once a year to network and share information regarding alumni relations, programming, services and issues of mutual interest. While the conference only takes place once a year, we hope you will build strong relationships within APT that will serve as resources for you when you need assistance, and over time will develop into lifelong friendships.

Nacogdoches is the oldest town in Texas, a city rich in Texas history. Stephen F. Austin State University was established in 1923 in honor of the Father of Texas. We encourage you to explore, relax and enjoy your visit.

We have many loyal and long-standing partners of APT and some new ones, all who work with colleges, universities and Associations. They have helped underwrite this conference, so please thank them when you get a chance. We really appreciate their support.

Though we all serve different institutions, we all look for ways to improve our organizations and better serve our Alumni. This year we have some outstanding speakers which will present on a variety of topics and issues that have relevance to all us. We are extremely grateful for our speakers and presenters willingness to share their experience and wisdom.

Again, thank you for being here with us. We hope you enjoy the conference and continue your good work at your institution.

Sincerely,

A handwritten signature in black ink that reads 'Jeff Davis'. The signature is fluid and cursive, with the first name 'Jeff' and last name 'Davis' clearly distinguishable.

Jeff Davis,  
Executive Director of Alumni Affairs  
Stephen F. Austin State University  
APT 2011 Conference Chair

**The 2011 APT Conference Planning Committee**

Mitzi Blackburn, Stephen F. Austin State University  
Alicia Chatman, Stephen F. Austin State University  
Katy Crawford, Stephen F. Austin State University  
Rhonda Crim-Tumelson, Stephen F. Austin State University  
Mo Davis, Stephen F. Austin State University  
Emily Payne, Stephen F. Austin State University  
Beverly Smith, Stephen F. Austin State University

# AGENDA

## Sunday, January 30, 2011

12:00 – 12:45 pm      **Lunch at Piney Woods Country Club for those golfing**

12:45 – 5:00 pm      **Optional Golf Outing at Piney Woods Country Club**  
**\$45 (includes round, lunch, and range balls)**  
To Register please contact Jeff Davis – [jhdavis@sfasu.edu](mailto:jhdavis@sfasu.edu)

3:00 – 5:30 pm      **Conference Registration**  
*Hotel Fredonia – Angelina Room*

6:00 – 7:30 pm      **Registration and Reception**  
*Downtown SFA Cole Art Center*  
**Sponsored by the Nacogdoches CVB**



7:45 pm      **Dinner on your own (we will have suggestions)**

## Monday, January 31, 2011 (All Monday Session Held on the SFA Campus)

7:30 am      **Load bus to SFA campus departing from Hotel Fredonia**

7:45 – 8:45 am      **Continental Breakfast**  
*Twilight Ballroom*  
**Sponsored by Collegiate Insurance Resources**

8:00 – 3:15 pm      **APT Partners Exhibit Booths Open**  
*Regent Suite A*



**Collegiate  
Insurance Resources**

8:45 – 9:00 am      **Conference Welcome**  
*Twilight Ballroom*

9:00 – 10:00 am      **Opening Session**  
*Twilight Ballroom*  
Dr. Miles McCall, President, Lon Morris College

10:00 – 10:30 am      **Morning Break and Visit with APT Partners**  
*Regents Suite A*  
**Sponsored by Nationwide**



**Nationwide®**  
*On Your Side*

10:30 – 11:45 am	<b>Morning Breakout Sessions</b> (Choose one to attend)  <b>Chapters/Clubs: Regional Programming</b> <i>BPSC Multi Media Room</i> Paul Clifford, President and CEO, East Carolina Alumni Association  <b>It's Not Just Class Reunions Anymore</b> <i>Tiered Classroom</i> Georgianne Hewett, Associate VP for Alumni and Parent Relations, Southwestern University	
11:45 am – 1:15 pm	<b>APT Roundtable Lunch</b> <i>Twilight Ballroom</i> <b>Visit with colleges on specific table topics</b> (Membership/Marketing, Chapters, Legislative Advocacy, Events/Activities, Doing more with less, Volunteer Management, Student Alumni Programs)	
1:15 – 1:45 pm	<b>Your Time</b> Visit with APT Partners; Take a tour of the Tracie D. Pearman Alumni Center, Check in with your office.	
1:45 – 2:45 pm	<b>Afternoon Breakout Sessions</b> (Choose one to attend)  <b>Let's Talk Alumni Activities and Events</b> <i>Tiered Classroom</i> Moderated by: Mitzi Blackburn, Director of Activities & Events, SFA Alumni Association Stephanie Thompson, Assistant Director for Special Events, UTA Alumni Association  <b>Building Your Official Ring Programs: The Stories of Success</b> <i>Regents Suite B</i> Curt Langford, Director of Official Ring Programs, Balfour  <b>The Affinity Card Landscape</b> <i>BPSC Multi Media Room</i> Philip L. Lazzati, Co-Founder & Managing Director, Capital Affinity Partners	
2:45 – 3:15 pm	<b>Afternoon Break and Visit with APT Partners</b> <i>Regents Suite A</i> <b>Sponsored by Wordyisms</b>	
3:15 – 4:45 pm	<b>Afternoon Session</b> <b>Making Sure You Matter: Critical Issues for Alumni Relations</b> <i>BPSC Theatre</i> Andrew Shaindlin, Founder and Consultant, Alumni Futures	
4:55 – 5:00 pm	<b>Load bus back to Hotel Fredonia at morning drop off point</b>	
6:15– 6:45 pm	<b>Pre – Dinner Reception</b> <i>Auntie Pastas Restaurant</i>	
6:45– 8:45 pm	<b>Dinner &amp; White Elephant Gift Exchange</b> <i>Auntie Pastas Restaurant</i> <b>Sponsored by Balfour and Marsh</b>	



**Tuesday, February 1, 2011 (All Tuesday Sessions Held at the Hotel Fredonia)**

7:30 – 8:30 am

**Fredonia Breakfast Buffet**

*Convention B*

Visit with Partners and Colleagues

**Sponsored by Liberty Mutual**



8:30 – 10:00 am

**Closing Session**

**10 Ways Alumni Associations Support the  
Institution: Opportunities to Engage our Alumni.**

*Convention B*

Leland D. Patouillet, Ph.D., Founder and Consultant, Patouillet Consulting

10:00 – 10:30 am

**APT Business Meeting and Closing**

*Convention B*

# SPEAKERS & PRESENTERS





**Miles McCall, Ph.D.**  
**President**  
**Lon Morris College**

Dr. Miles McCall was elected as the 18th President of Lon Morris College in Jacksonville, Texas in July 2006. Lon Morris College is the oldest two-year college in the state of Texas, founded in 1854, and is affiliated with and supported by the Texas Annual Conference of the United Methodist Church. In his first year, McCall organized the college into six strategic business units, secured over 2 million dollars in private support, and created an innovative three year business plan.

McCall came to Lon Morris College with a distinguished career as a professor, administrator, writer and professional speaker. Prior to his appointment as President of Lon Morris College, McCall taught for almost twenty years at Stephen F. Austin State University as a Professor of Communication and Leadership Studies. He also served as a member of the graduate faculty. As a faculty member, he was named the Outstanding Faculty Member of the Year and won the prestigious Teaching Excellence award for the College of Applied Arts and Sciences. He was instrumental in creating the Leadership minor. In 1998, McCall became Vice President for Alumni Affairs at Stephen F. Austin State University. As Vice President, McCall initiated new programs to build campus tradition, participated in a leadership role for a successful 35 million dollar capital campaign, and helped secure the largest single cash gift in a bequest worth over 3.8 million dollars.

McCall is also an innovative professional speaker. He founded an organization called Generational Leadership.Com, ([www.generationalleadership.com](http://www.generationalleadership.com)) which now works with businesses and organizations in an attempt to impact over one million people per year by challenging them to discover and further develop the communication and leadership character in families and individuals.

McCall has published dozens of articles in a wide range of professional journals. His story, "The Family Intersection" was featured in *Where the Heart Is: Stories of Home & Family*. In addition, his story, "My Loss Is Your Gain: Parenting Lessons from Death" was featured in *Reverse Mentoring: What My Students Taught Me*. His training book entitled, *The Power Parent: Taking Corporate Management Home*, has generated sales in Hong Kong, Indonesia, Canada and the United States. His most recent book, *True Merit Character*, was adopted by a national fraternity as a college-aged training curriculum.

McCall earned his Ph.D. in the area of curriculum-instruction, training and development at Texas A&M University. He has a Masters degree in communication and administrative services and a Bachelors degree in communication and psychology, both from Stephen F. Austin State University. He also attended graduate school at the University of Houston-Clear Lake City.

McCall has served with numerous civic organizations, such as being President of the Jaycees, United Way Vice President, Boys and Girls Club Director, President of the Texas Lyceum Association, Wesley Foundation Chairman of the Board, National President and Chairman of the Board for the National Alpha Tau Omega Fraternity.

McCall is married to Jana Baker McCall. They have a daughter, Mallory and a son, Mason. They share time living at their lake home or farm in East Texas and spend time on their boat (a 30 trawler named Nautical Miles) while cruising the Gulf Coast.



**Paul J. Clifford**  
**President and CEO**  
**East Carolina Alumni Association**

Paul J. Clifford is the Associate Vice Chancellor for Alumni Relations and the President of the East Carolina Alumni Association. He is responsible for directing a program that offers programs, services, and communications to 130,000 Pirate Alumni worldwide.

Prior to taking the post at ECU, he was the Director of Outreach at the University of Connecticut Alumni Association, responsible for chapters, affinity groups, school & college societies, community service, legislative advocacy and volunteer management. Clifford was Director of Alumni Relations at SUNY- New Paltz, prior to joining the staff at UConn. He began his career as Assistant Director of Alumni Relations for Communications and Student Programs at James Madison University in Harrisonburg, VA.

Clifford, an active member of the Council for the Advancement and Support of Education, has been a presenter, faculty member and faculty chairperson at numerous conferences sponsored by the professional organization. In addition, Clifford has published a number of articles in the "Development & Alumni Report" and was the co-editor of "Alumni Clubs and Chapters", published by CASE Books in September of 2002. In addition, he served a three year term as a commissioner on CASE's Commission for Alumni Relations from 2005-2008. Most recently he authored a chapter in CASE's newly released "Alumni Relations: A Newcomers Guide to Success."

In 2006, the East Carolina Alumni Association was admitted into the Council of Alumni Association Executives (CAAE). CAAE membership is made up of chief executive officers of alumni organizations supporting major private, public and land grant institutions of higher education. CAAE membership includes professionals with extensive and senior level administrative experience in not for profit organizational membership, higher education administration, program development and implementation, consulting, finance management, communication and marketing.

In January of 2008, Clifford was named to the inaugural class of 20 fellows in the Chancellor's Leadership Institute (ECU). The Institute is the most prestigious leadership training program at ECU designed for faculty and staff that are poised for future leadership roles.

In 2009, Clifford launched the Impact Alumni Podcast, a podcast dedicated to the issues that concern alumni relations professionals worldwide. This is the only higher education advancement related podcast on the web today. You can learn more about the program by visiting [www.alumnipodcast.com](http://www.alumnipodcast.com).

Clifford resides in Greenville, North Carolina with his wife, Jenne, and their three children. In his spare time, Clifford coaches his children's various sports teams, is a published photographer, and recreational runner. He co-hosts a local radio show titled "A Pirate's Life For Me!" He is a 1996 graduate of Bloomsburg University of Pennsylvania where he was named the 2005 Young Alumnus of the Year.



**Georgianne Hewett**  
**Association Vice President for Alumni and Parent Relations**  
**Southwestern University**

Georgianne Hewett serves as Associate Vice President for Alumni and Parents Relations at Southwestern University, Georgetown, Texas. Her thirteen years of experience in alumni and parent relations have included conducting an alumni program self-study, implementing the subsequent recommendations, restructuring the alumni association's governance and enhancing overall programming.

Hewett is a consummate Advancement professional with measurable success in evaluating programs, identifying opportunities and implementing strategies for increased effectiveness. She has overseen a self-study and implementation process that resulted in the increased volunteer participation, enhanced programs and consecutive years of record-setting attendance at premier event. She is skilled in process improvement, constituent relations, volunteer management, marketing, communications, and program development

She credits rigorous assessment and strategic improvements for her program's successes (ex. five consecutive years of record-breaking attendance at Homecoming and Reunion Weekend). Her primary interest is addressing the constant challenge of engaging volunteers in ways that are meaningful and planning enriching programs that compete with the multitude of interests and demands in people's lives all in support of institutional goals.

Prior to serving as Associate Vice President for Alumni and Parent Relations at Southwestern University, Hewett served as Director of Foundation Relations for the Texas Methodist Foundation, served in roles in the IT and health care sectors, and served as Assistant Director of Alumni and Parent Relations at Southwestern University earlier in her career.

Georgianne is very active in the Council for Advancement and Support of Higher Education (CASE). She currently serves on the CASE District IV Board of Directors and is a member of the CASE Commission on Alumni Relations. She has formerly served as a moderator, presenter, and coordinator at prior CASE IV District Conferences, and is a recipient of multiple CASE Awards.

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## MONDAY AFTERNOON BREAK OUT SESSION SPEAKER



**Curt Langford**  
**Director of Official Ring Programs**  
**Balfour**

Curt Langford serves as the Director of Official Ring Programs for Balfour's College Division headquartered in Austin. Langford consults regularly with alumni associations seeking to build their ring traditions, and conducts regional and on-site workshops designed to maximize program growth.

Prior to joining Balfour, he served in a variety of roles over eleven-years with the Texas Tech Alumni Association including Assistant Editor, Special Projects Director, SAA Advisor/Marketing Director, and Associate Vice President. While at Tech, Langford belonged to many professional organizations including the Council for Advancement and Support of Higher Education (CASE), the Affiliated Student Advancement Programs (ASAP) and the Alumni Professionals of Texas (APT). He was also one of the founding members of the Council of Alumni Marketing and Membership Professionals (CAMMP).

While with the Texas Tech Alumni Association he worked to build alumni association membership; helped to develop the Association's online presence; managed affinity and association marketing; advised the association's student advancement organization, facilitated design and implementation of official ring and inaugural ring ceremony; and assisted with the orchestration of strategic planning sessions through an outside communications consultant.

Langford received a Bachelor's degree from Texas Tech University in public relations/marketing and later completed his Master's there in higher education. He and his wife Jill, also a Tech graduate, reside in Lubbock Texas and have two children, Grant (14) and Grace (11).

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## MONDAY AFTERNOON BREAK OUT SESSION SPEAKER



**Philip L. Lazzati**  
**Managing Director**  
**Capital Affinity Partners**

A native of Baltimore, Maryland, Lazzati is a graduate of the class of 1984 from Loyola University and also attended the university's Sellinger School of Business and received his Executive MBA '90. Lazzati began his professional career with McCormick & Co., Inc. in 1984 and held various sales and management positions in Business Development and after 12 years with the company transitioned to the Affinity credit card industry with MBNA America. Lazzati worked for MBNA America and served as the company's Regional Business Development Director out of the San Francisco office from '96 - '98.

In 1998, Lazzati relocated to MBNA's corporate headquarters in Wilmington, Delaware as National Affinity Sales Director and in 2001 transitioned to Director of Business Development & Marketing for the Affinity and Ethnic Sectors until 2004. In 2004, Lazzati co-founded an independent affinity credit card marketing company in US Card Partner Services, Inc. where the company launched US Bank Corp's entry into the Affinity credit card business and also served as US Bank's exclusive independent sales agency. In 2009, the company added additional financial service clients in First National Bank Omaha and Liberty Mutual.

In 2010, Lazzati founded Capital Affinity Partners. He currently serves as Managing Director for the company, and the firm represents Capital One Bank and UMB Bank. Lazzati is President of the Loyola University Alumni Association Board of Directors, President of the Associated Italian American Charities, and supports various charities including the National MS Society, Sisters Academy of Baltimore, and the The O'Dwyer House. He is married to Pilar Alvarez Marquez and proud father of Alessandro (6) and little Jimmy (3).



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## MONDAY AFTERNOON BREAK OUT SESSION MODERATOR



**Mitzi Blackburn**  
**Director of Activities and Events**  
**Stephen F. Austin Alumni Association**

Mitzi Blackburn serves as the director of Activities and Events for the Stephen F. Austin Alumni Association, Nacogdoches, Texas. Her twenty years of experience in alumni affairs include serving as Assistant to the Vice President and Coordinator of Alumni Activities and Events, prior to becoming Director of Activities and Events in 2008. Mitzi has worked at Stephen F. Austin State University for more than twenty-seven years and is planning on retiring in January 2012.

Blackburn has elevated the level of alumni events and programming at SFA and played a large role in the increase in participation from alumni and students. Blackburn has taken and improved upon programs and events at SFA including SFA Homecoming, The Big Dip, Lumberjack Alley, SFA Senior Sendoff, Golden Jacks 50 year Reunion, Mud Bugs and Mud Balls, The Big Switch, Roses for Grads and many others in her time at SFA. She has also made a positive impact as an advisor and mentor to the members of the SFA Student Foundation Association. Blackburn has been integral in assisting them in the planning, organizing, and management of the various events and activities that they are involved with.

Blackburn is a member of the Council of Advancement of Support for Higher Education (CASE), Alumni Professionals of Texas (APT), the Affiliated Student Advancement Programs (ASAP), and the SFA chapter of University Professional Women (UPW). She was selected as the 2010 UPW Woman of the Year. Blackburn attended Angelina College and Stephen F. Austin State University. She is married to her husband Philip and they have a Dachshund named Daisy.

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## MONDAY AFTERNOON BREAK OUT SESSION MODERATOR



**Stephanie Thompson**  
**Assistant Director for Special Events**  
**UT Arlington Alumni Association**

Stephanie Thompson serves as the Assistant Director for Special Events at the UT Arlington Alumni Association in Arlington, Texas. She has been with The University of Texas at Arlington for over 15 years. The past six years have been served as the Assistant Director for Special Events at the Alumni Association.

She is a proud Maverick with a Masters in Public Administration from UT Arlington. She also holds a Bachelors degree in Psychology from Texas A&M University and a Masters in Psychology from the University of Mary Hardin-Baylor in Belton, Texas.

She is a member of the North Texas Chapter of Society of Government Meeting Professionals (SGMP) and served as Chapter Secretary from 2007-2010. In 2008 and 2009, she received SGMP's Sharon Harrison Planner of the Year Award. Stephanie currently serves on the Board of the Directors at University of Mary Hardin-Baylor and she has served on the Board of the Fort Worth/Tarrant County A&M Club since 2004.



**Andrew Shaindlin**  
**Founder and Consultant**  
**Alumni Futures**

Andy Shaindlin has worked in alumni relations since 1989, at Brown University (his alma mater), the University of Michigan, and the California Institute of Technology, where he served as Executive Director of the Caltech Alumni Association from 1999 until 2010. He also served for seven months as Acting Assistant Vice President for Development & Alumni Relations at Caltech where he oversaw annual giving and leadership giving programs as well as development communications and marketing.

Past roles he has served in include directing programs and Alumni Education, alumni career services, travel/study, and other life-long related programs. Shaindlin has spoken and written extensively about the Alumni Relations profession. He has chaired or co-chaired a number of professional conferences on topics ranging from alumni education to technology in institutional advancement. Shaindlin's specialties include online services for alumni, business networking practices, alumni membership programs, social and business networking software for alumni, educational travel programs and alumni communications.

Shaindlin helps organizations (including non-profits and technology start-ups) understand and deploy community-enabling technologies. He has presented at dozens of conferences worldwide, and has published articles, white papers and book chapters on topics in advancement.

Shaindlin established Alumni Futures in 2007 as the first blog devoted to the profession of alumni relations, which boasts more than 1,700 subscribers. His consulting practice grew from reader interest in his weekly postings on ideas, trends and new directions in educational advancement.

Shaindlin currently chairs the Council for Advancement and Support of Education (CASE) Commission on Alumni Relations, and serves on the CASE Web Advisory Board and the CASE Board of Trustees. He received the CASE Crystal Apple Award for Excellence in Teaching in 2006, and is the former Chair of the EDUCAUSE Task Force on Identity Management. He holds a Master's degree in Education and lives in Pasadena, California.



**Leland D. Patouillet, Ph.D.**  
**Founder and Consultant**  
**Patouillet Consulting**

Dr. Lee Patouillet brings more than 30 years of full-time institutional advancement experience in higher education and knowledge of best practices to his consulting practice. Patouillet has led three different alumni associations: the University of South Florida, the University of Pittsburgh and most recently the University of Florida. At all of these institutions, he served on the senior leadership team responsible for all aspects of advancement including two different capital campaigns in excess of one billion dollars each.

Patouillet began consulting in the 1980's and contracts with other advancement professionals as needed for given projects. The firm works with public and private colleges and universities of all sizes as

well as the social sector.

Patouillet Consulting serves as a strategic partner in meeting the needs of our clients in the following areas:

- Generating revenue (including capital campaigns, feasibility studies, annual funds, membership dues and affinity programs).
- Integrating fundraising and alumni programs especially in capital campaigns.
- Developing dynamic strategic plans resulting in mission focused and results oriented alumni organizations.
- Conducting program reviews and enhancing board effectiveness.
  
- Developing, tracking and measuring constituent engagement strategies.
- Conducting market research to promote data driven decision making.
- Involving alumni in student recruitment, legislative relations and career development.
- Establishing and enhancing student alumni programs and student outreach.

Patouillet earned a B.A. in American Studies with Honors from the University of South Florida, a M.S. in College Student Personnel from the University of Tennessee and a Ph.D. in Administrative and Policy Studies from the University of Pittsburgh.

He is a charter member of the Council of Alumni Association Executives (CAAE) and is a long-time active volunteer leader for the Council for Advancement and Support of Education (CASE). Patouillet is a frequent speaker at CAAE and CASE meetings as well as a regular contributor to *CASE Currents*. He is also a charter member of the editorial board for *The International Journal of Educational Advancement*. The associations led by Patouillet have received more than 10 CASE Circle of Excellence awards.

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# PRESENTATIONS & HAND-OUTS





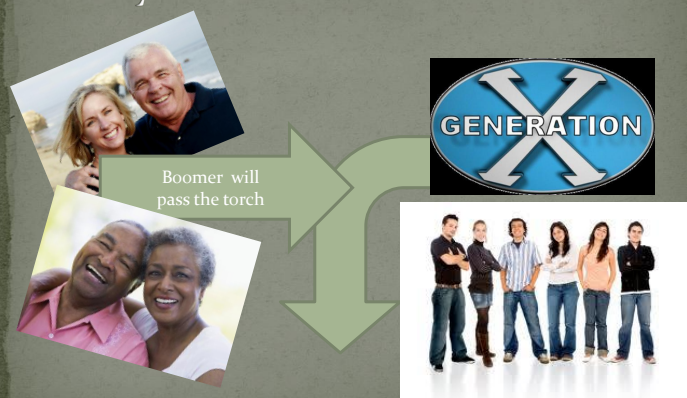
## Regional Programming

Paul J. Clifford  
President and CEO  
East Carolina Alumni Association

### Questions to consider

- Are Chapters still an effective way to deliver programs, services and communications to alumni?
- What are the benefits of a strong regional presence to Development, Marketing, Alumni Relations, and Legislative Affairs?
- What impacts our ability to engage alumni on a regional basis?

### Reality #1: Generational Trends



### Reality #2: Access to Information



### Reality #3: Accountability

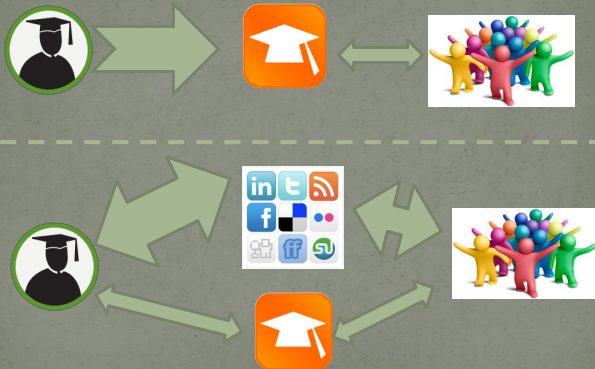


### Reality #4: Nothing Replaces Face to Face interactions



## Reality #5:

Alumni can organize without us



## Reality #6: Creativity beyond CASE

got creativity?

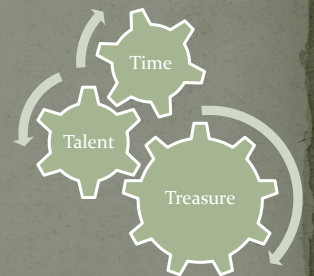


Are you working on the next best practice?

## Where do you start?

## Why do we host regional programs?

- ❖ Bring the institution to alumni
- ❖ Show the power of your alumni reach and network
- ❖ Connect alumni to each other
- ❖ Assist Advocacy and Recruitment efforts
- ❖ Raise money
- ❖ Encourage Ambassadorship
- ❖ Identify and engage volunteers



## Theories and Models

- Theories
  - Alumni Chapters
    - Formal organizations comprised of volunteers supported by staff with the purpose of engaging alumni in regional areas
  - Regional Programs
    - Staff driven and volunteer supported delivery of mission based events with the purpose of engaging alumni in regional areas
- Models
  - Independent – Alumni Chapters are able to stand and function on their own
  - Interdependent – Some funding from the Alumni Association supports volunteer driven Alumni Chapter
  - Dependent/Regional Program
  - Hybrid of volunteer and staff driven

## Regional Analysis

## Where to go?

Identify regions that are critical to your institutions success by reviewing

- Alumni Population
- Parent Population
- Prospecting Potential
- Other Institutional Priorities



## Regional Programming

### *Traditional, Volunteer-driven Chapter*

#### Pros:

- Written guidelines determine process and expectations
- Self-sustaining; tend to be more active
- Alumni develop leadership skills, take on greater control

#### Cons:

- Loss of control; difficult to manage
- May not save you time – more activity means more demands
- Volunteer burnout
- Quality of product

## Regional Programming

### *Staff-driven Model*

#### Pros:

- Won't have to recruit and maintain volunteers
- Won't overburden volunteers
- Can ensure compliance with University goals
- More control over budget and marketing
- Quality assurance

#### Cons:

- Chapters are less active
- Volunteers feel less involved
- Less leadership development

## Regional Programming

### • Hybrid Model

#### • Pros:

- Never say no! Mixed structures allow you to enable volunteers
- Volunteers can work to the level at which they are comfortable
- Can afford control to volunteers as necessary
- Quality control assured
- Partnership

### Case Study

## University of Miami Hybrid Regional Outreach



## Regional Benchmarks

### "A" City

FORT LAUDERDALE Chartered Club  
Alumni Population: 8,594  
Parent Population: 700  
FY08 Donors by Club Code: 1,420  
FY08 Overall Giving: \$420,708  
FY08 President's Circle Donors: 112  
FY08 President's Circle Prospects: 310  
FY08 Rated Prospects: 876

### "B" City

ATLANTA Chartered Club  
Alumni Population: 1,655  
Parent Population: 462  
FY08 Donors by Club Code: 522  
FY08 Overall Giving: \$44,890  
FY08 President's Circle Donors: 26  
FY08 President's Circle Prospects: 58  
FY08 Rated Prospects: 192

### "C" City

NASSAU, BAHAMAS  
Alumni Population: 1,264  
FY08 Donors by Club Code: 3  
FY08 Overall Giving: \$1,010  
FY08 President's Circle Donors: 1  
FY08 President's Circle Prospects: 3  
FY08 Rated Prospects: 0



## Flexible Regional Outreach

**P**rofessional and social networking  
**R**ecruiting students and scholarship fundraising  
**I**bis – sports related programs  
**D**evotion to community  
**E**ducation for alumni



## Miami Regional Outreach

- ❖ Create Strong Institutional Message
- ❖ Engage Volunteers
  - Host Committee
  - Club Presidents
  - Speakers



## Structured Chapter Model



CASE Study:  
Boston College Star Chapter

## BC CHAPTER STAR PROGRAM



## Programming Categories



### Networking



### Resource Development



### Social Connections



### Image Enhancement



## Ways to Measure Success

- Basic
  - Attendance & positive touches
  - Scope of events
  - Institutional response & fundraising success (participation rate)
  - Quality of volunteer leadership
  - Level of communication with alumni
  - Ease of managing
  - Alumni response & enthusiasm
  - Survey: The Magic Question?
- Next Level
  - Behavioral Measures

## What do you do at your institution?



---

## **Building Your Official Ring Programs: The Stories of Success**

By Curt Langford, Director of Official Ring Programs

### **The Three Vs of Rising Ring Traditions**

When evaluating your ring programs, it's important to understand the overall history and context of the official ring movement. What is the common Vision for these programs, what are the Values and what are the Vulnerabilities you should be alert to?

### **Making Evangelists, Not Sales**

How do you make your ring message even more compelling to students and grads? Whether it's "building the mystique," "adding emotion" or "selling the invisible," what does it all mean in the context of telling your ring story? Learn the creative practices, strategies and rituals schools are implementing to spread the good word regarding rings.



## THE AFFINITY CARD LANDSCAPE

*Alumni Professionals of Texas 2011 Conference  
Nacogdoches, TX*

*Confidential – Please do not distribute or duplicate*

### The Affinity Card Landscape

#### Historical Background (1995-2006)

- Solid & Growing Economic Conditions
- ✓ A Stable Credit Card Environment in the U.S.
- ✓ Strong & Competitive Card Environment – MBNA vs. FUSA/BankOne  
“The Plastic War”
- ✓ The Addition of New Issuers into the Card Market – Barclays/GE/US Bank
- Ability to Build & Grow Affinity Portfolios
- ✓ Manageable Card Acquisition Channels
- ✓ Good Direct Mail Response Rates
- ✓ Ability to: Tele-market, Target students & Market on-campus (Alumni & Sporting Events)
- ✓ Freedom to Lend & Increase Credit Lines.....& Interest Rates

Page 2

**PARTNER** us card  
**SERVICES**

### The Affinity Card Landscape

#### Historical Performance (1995-2006)

- For Banks and Card Issuers
- ✓ Highly Profitable Line of Business
- ✓ Mature Affinity Credit Card Programs/Alumni Account Portfolios
- ✓ Low Charges-offs & Credit Card Losses
- ✓ **Ability** to Overpay to Secure Business
- For Affinity Partners and Alumni Associations
- ✓ Aggressive Financial Advances/Guarantees Scenarios
- ✓ Minimal Resources Needed to Participate
- ✓ Long-Term Commitment for Alumni Budget
- ✓ Competitive Product for Alumni (Relative to Interest Rate & Customer Service)

Page 3

**PARTNER** us card  
**SERVICES**



## The Affinity Card Landscape

### Changing Environment (2006-2008)

- The Credit Card Industry & Economic Conditions
- ✓ The Increase of Non-Endorsed Direct Mail – Cap One, Amex, Citi, Chase
- ✓ Card Emphasis Placed on 'Rewards' Feature
- ✓ The Increase of 'Cards per Wallet' = Dilution of Affinity Strength
- ✓ Shrinking of Affinity Portfolios due to the Decline in Direct Mail Response, & the Elimination of the Tele-marketing Channel
- ✓ Movement of the Consumer to non-Affinity Product
- ✓ Affinity Portfolios Climaxed
- ✓ The Effects of the Sale of MBNA to Bank of America
- ✓ The Effects of the Sale of FUSA/BankOne to Chase
- ✓ Issuers Re-Define themselves & their Affinity Strategies

Page 4



## The Affinity Card Landscape

### The 'Affinity Card' Credit Crisis (2008-2009)

- The Credit Card Industry & Economic Conditions
- ✓ Issuers Officially Exit the Affinity Business
- ✓ The 'Competitive' (Plastic War) Environment Ends
- ✓ One Issuer Standing with Limited Ability/Commitment
- ✓ Smaller Affinity Programs are Terminated
- ✓ Limited Renewal Options Available
- ✓ Advance/Guarantees Reduced or Eliminated
- ✓ Credit Lines are Reduced
- ✓ Consumer Card Accounts are Closed
- ✓ Affinity Portfolios are Significantly Reduced
- ✓ Alumni Programs faced with Declining Royalties from Declining Card Portfolios
- ✓ Issuers Standing do not Invest in Marketing to Grow/Maintain Programs

Page 5



## The Affinity Card Landscape

### The 'Card Act' - The End of an Era (2010)

- The Credit Card Environment & Industry Conditions
- ✓ The Effects of the Card Act:
- High Cost for Issuers to Comply
- A Change in Lending Requirements for Issuers
- Upfront Pricing vs. Back-End Pricing
- Banks Forced to Change Risk Management & Re-Pricing Strategies
- Bank's "Fee" Income Policies Modified
- Challenge to Affinity Debit Card Program
- Higher Cost to Direct Mail due to Low Response Rates
- Increasing Cost of Acquiring Accounts by Issuers
- Additional Disclosure Requirements by Issuers
- Fed Requires Full Disclosure for C & U Alumni Programs
- For Associations - Declining Royalties from Card Programs
- [www.federalreserve.gov/CollegeCreditCardAgreements](http://www.federalreserve.gov/CollegeCreditCardAgreements)

Page 6



## The Affinity Card Landscape

### 2011 – A New ‘Affinity’ Frontier

- **The Credit Card Environment & Industry Conditions**

- ❖ The Past is the Past
- ❖ For Current Programs - Advances > Earned Royalties
- ❖ Redefining “Advance/Guarantee”
- ❖ Conservative Account and Revenue Models
- ❖ Large Dominant Issuer Strategy – Evolving & Unknown (Renewals)
- ❖ Current Options for Renewal – (Be Careful)
- ❖ Request for Alumni Association to be Active
- ❖ Increased Compensation Model - GIP
- ❖ Capital One Bank Enters the Market
- ❖ Re-Define Emphasis on Affinity Visa/MC Product
- ❖ Customize Program & Rewards and Offer Savings Product along with Rewards Donation Feature
- ❖ Discussion of Other New Unconventional Issuers:
  - ✓ Sallie May
  - ✓ Nationwide
  - ✓ Credit Union
  - ✓ UMB Bank (Small Associations)

Page 7

**PARTNER** us card  
**SERVICES**

## The Affinity Card Landscape

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**PARTNER** us card  
**SERVICES**

alumni futures

Andy Shaindlin  
Alumni Professionals of Texas  
January 2011

CRITICAL ISSUES FOR ALUMNI RELATIONS

**MAKING SURE  
YOU MATTER**

alumni futures

**TECHNOLOGY\***

**RELEVANCE**

**CONTROL**

**\*BEHAVIOR**

alumni futures

Internal Challenge

**VISIBILITY**

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External Challenge

**COMPETITION FROM YOUR  
OWN CUSTOMERS**

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...a critical partner for their  
department's activities?

... "those guys who plan parties"?

**ARE YOU...**

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...know your mission and roles?

...think you're doing a great job?

**DOES THE CAMPUS...**

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**Increase** your perceived relevance

or

Be marginalized and **lose** resources

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Connect alumni to each other  
and  
Connect alumni to alma mater

**MAIN ASSOCIATION ROLES**

alumni futures

External Challenge

**COMPETITION FROM YOUR OWN CUSTOMERS**

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Online Social Networks  
Powerful Internet Search  
Mobile Access

**NO INFORMATION MONOPOLY**

alumni futures

Accessible to most people  
most of the time  
from most locations

**MOST INFORMATION**

alumni futures

**TIMES**ONLINE  
October 11, 2009  
'Self-learners' creating university of online



"Why go to college when college will come to you?"

alumni futures

A source of competitive advantage

## EFFECTIVE ALUMNI NETWORKS

alumni futures

You must measure  
the value of alumni networks

## EFFECTIVE ALUMNI NETWORKS

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...now self-organize around issues

...will engage on practical terms

## ALUMNI

alumni futures

...will ignore alma mater  
if engagement lacks **practical value**

## ALUMNI

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...amplifies changes in **relationships**  
 ...is a mirror for constituents' **behavior**

## TECHNOLOGY

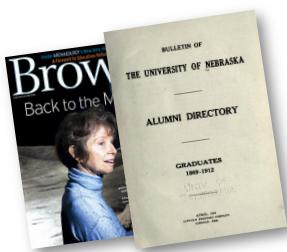
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You don't control how alumni communicate

You don't control how alumni connect

## INTERACTION GOES ONLINE

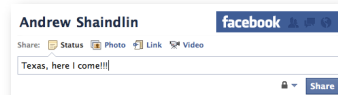
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News about campus  
 News about classmates  
 Directory information

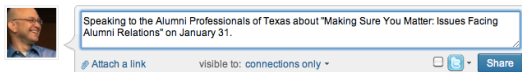
## THE OLD MODEL

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3<sup>rd</sup> party web sites  
 Status updates on social networks  
 Mobile platforms, instant

## THE NEW MODEL



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Prev in Location 16th September 2010 by Chad Catachio Next in Location

### Foursquare Goes To School With 20 University Partnerships

Harvard Teams Up With Foursquare For Collegiate Check-Ins

It's hip to be square. Foursquare, that is. The renowned location-based social network has partnered with Harvard to create a campus-based game that rewards students with badges and points for exploring the school and surrounding areas of interest.

The news hails from the Harvard Gazette, which described a partnership that essentially takes an official Harvard-specific game with a social online badge on the existing Foursquare @ Harvard and beyond.



Location based services  
Geo-social networks  
Augmented reality

## LOCATION LOCATION LOCATION

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- Online Directories
- Class Notes
- Job/Résumé Posting
- Business Cards/Online Yellow Pages
- Listserves, In-house Forums
- Permanent E-mail
- E-newsletters

## BUILDING COMMUNITY: 2005

alumni futures

- Google
- Facebook
- LinkedIn
- Status Updates
- Monster, Experience
- Twitter
- E-mail fading
- Online Directories
- Class Notes
- Job/Résumé Posting
- Business Cards/Online Yellow Pages
- Listserves, In-house Forums
- Permanent E-mail
- E-newsletters

## BUILDING COMMUNITY: 2011

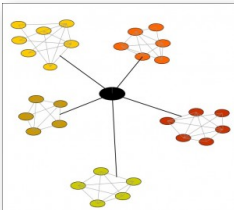
alumni futures

Don't count.  
Measure.

## ENGAGEMENT



alumni futures



Externalized Community

**FUTURE FRAMEWORKS**

alumni futures

Growth of 3<sup>rd</sup> party platforms:  
Volume + Relevance attract alumni  
*Access + Relevance = Engagement*

**FUTURE FRAMEWORKS**

alumni futures



Communication:  
no longer vertical

Listen more,  
Talk less

**FUTURE FRAMEWORKS**

alumni futures

Professionals' Roles:

...networking coach  
...connection broker  
...community manager

**FUTURE FRAMEWORKS**

alumni futures

Online Social Networks

An alternative place for alumni associations?  
An alternative to alumni associations?

**FUTURE FRAMEWORKS**

alumni futures

Social Media:  
*is not* a program or a service

Social Media:  
*is* a tool to support engagement

**FUTURE FRAMEWORKS**

alumni futures

Honor the institution's needs

Deliver unique, valued content to alumni

**FUTURE FRAMEWORKS**

alumni futures

...provide relevant opportunities  
...market them effectively  
...measure results

**ALUMNI ASSOCIATIONS MUST**

alumni futures

Do alumni want or need it? Does it solve a problem for them?

Can they get it as effectively or easily elsewhere?

**BEFORE YOU LEAP, ASK**

alumni futures



*andy@alumnifutures.com*

*www.alumnifutures.com*

*@alumnifutures*

**THANK YOU**

## 10 ways alumni associations support the institution: Opportunities for alumni engagement



February 1, 2011  
Lee Patouillet, Ph.D.



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What are your hopes and  
expectations for this session?



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**Years in Alumni Relations**

- 1-5
- 6-10
- 11-15
- 16-20
- 21+




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**Lee Patouillet, Ph.D**

33 years in alumni relations at  
USF, Pitt and UF  
25 years as an executive director  
Began consulting in the 1980's  
Charter member of the Council of  
Alumni Association Executives (CAAE)




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**One of the challenges in the  
field of alumni relations is  
the lack of a common  
language**




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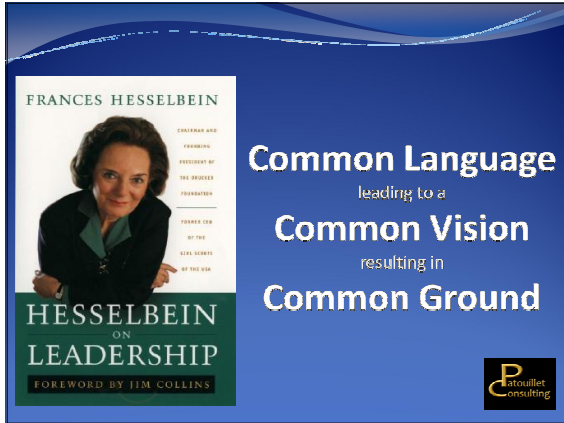
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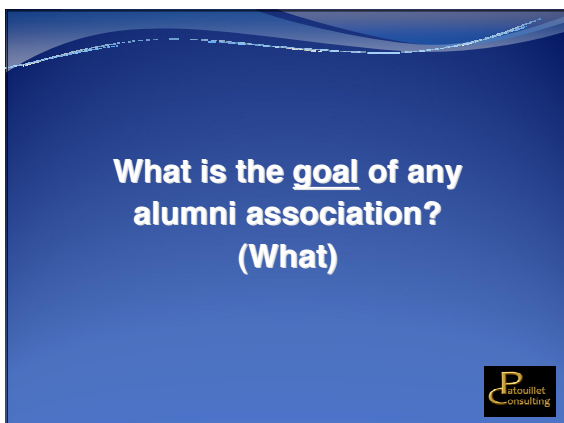
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**Goal: To connect and reconnect alumni to the college or university and to each other.**  
(What)




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**What is the process we use to achieve this goal?**  
(How)




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**Process: We connect and reconnect alumni through effective communication and meaningful engagement.**  
(How)




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**What is the purpose of the  
alumni association?  
(Why)  
-Mission-**




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**Purpose: The purpose of the alumni  
association is to support the college  
or university and enrich the lives of  
students and alumni.  
(Why)**




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**The alumni association creates  
partnerships that support the institution  
and enrich the lives of students and  
alumni worldwide by:**

- |    |     |
|----|-----|
| 1. | 6.  |
| 2. | 7.  |
| 3. | 8.  |
| 4. | 9.  |
| 5. | 10. |




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The alumni association creates partnerships that support the institution and enrich the lives of students and alumni worldwide by:

1. Developing positive public opinion for the institution and higher education in general

Examples:

-- Use of Social Media-- University of Central Florida, Event photos on Facebook, Ambassadorial role, Letters to the Editor




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2. Recruiting the best and brightest students.

Examples: Duke University, Georgetown, Pitt (Pitt Alumni Recruitment Team)




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3. Providing recognition, advice and counsel.

Examples: Aggie 100, Young Alumni Award (University of Florida), Distinguished Alumni Fellows (Penn State),




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4. Promoting the government relations agenda in support of the institution

Examples: UCLA, Indiana University, University of Minnesota, University of Florida- *Gators for Higher Education*




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5. Enhancing the quality of student life.

Examples: ASAP (Affiliated Student Advancement Programs), University of Florida, University of Colorado, University of Missouri Study




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6. Generating scholarship aid.

Examples: Penn State, University of Virginia




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**7. Cultivating and inspiring financial generosity.**

Examples: Natural byproduct of a good alumni relations program  
Penn State, Boston College, University of Michigan, Cal-Berkeley, Stanford University




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**8. Developing a more informed populace through alumni continuing education.**

Examples: Yale University, University of Florida (Back to College), Minary Conference/ Text: Alumni Continuing Ed




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**9. Providing career networking and career assistance to students and fellow alumni.**

Examples: University of Pittsburgh (Pitt Career Network), GA Tech, Affinity Partners: Harris Connect, IModules,




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10. Supporting the institution through alumni association membership dues, annual giving, and the capital campaign

Examples: Boston College ( Campaign: 3 Goals- Dollar/Engagement/Participation)




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Prioritization of the 10 ways the alumni association supports the institution and enriches the lives of students and alumni. Market Research (PEG), Program Reviews (Focus on top 3-4 priorities)




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The Engagement Process  
Identification  
Information  
Involvement  
Investment




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What are the  
three basic forms  
of Investment?



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Time  
Talent  
Treasure



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Models for Tracking and  
Measuring Alumni  
Engagement  
Penn State, Pitt &  
University of Wisconsin



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Patouillet Consulting: Key Areas:

- Revenue Generation
- Strategic Planning/Program Reviews
- Constituent Engagement Strategies
- Comprehensive Alumni Programs
- Integration of Alumni and Development



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[lee@patouilletconsulting.com](mailto:lee@patouilletconsulting.com)

Atlanta, GA



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Thank You  
Questions &  
Comments



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# Scorecard 2003-2010

Statistics at-a-glance about select Penn State Alumni Association programs and services.

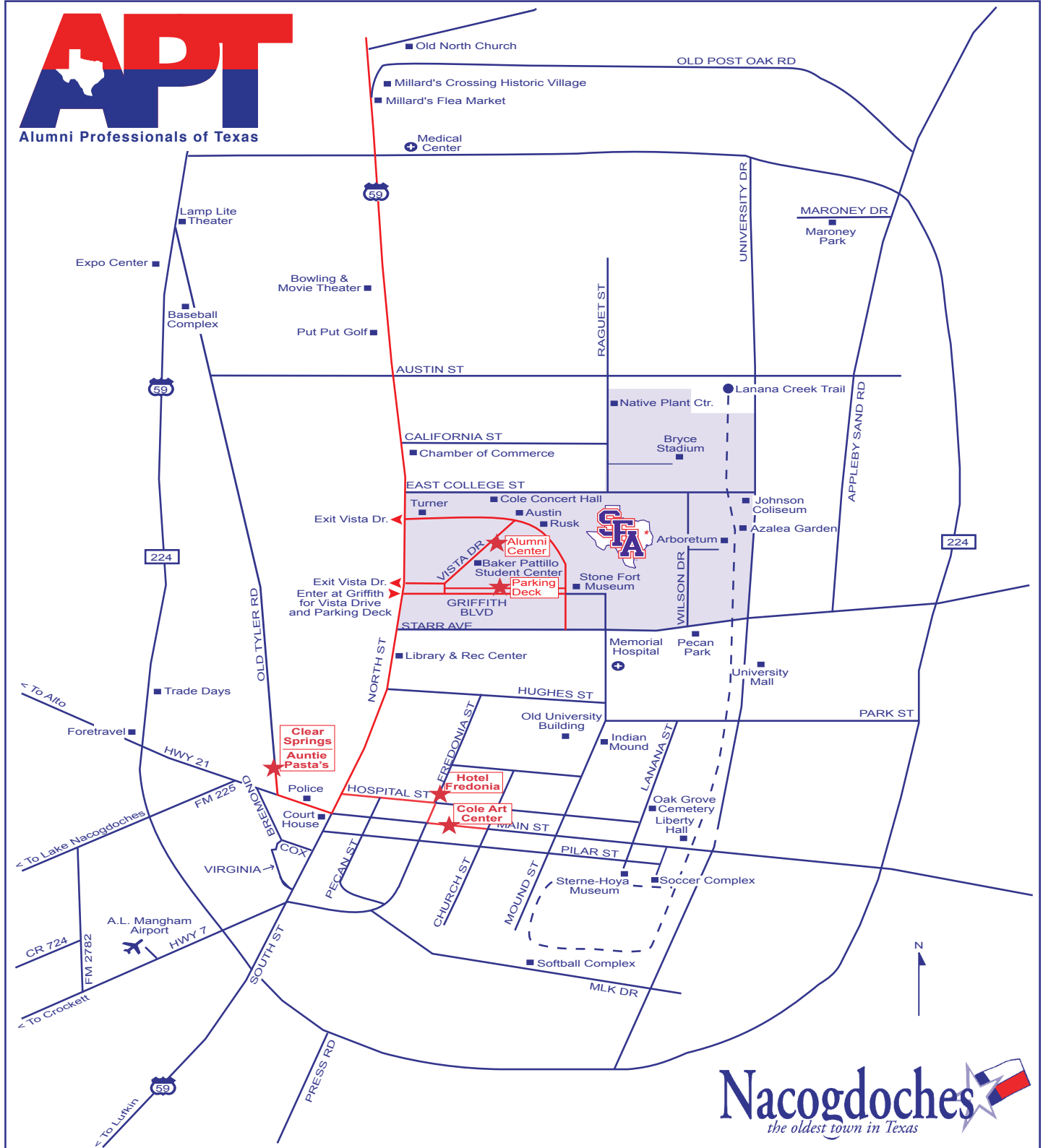
Membership	FY02-03	FY03-04	FY04-05	FY05-06	FY06-07	FY07-08	FY08-09	FY09-10
PSAA Membership	146,620	152,720	156,142	159,063	159,831	160,742	161,234	164,658
By Category:								
■ Alumni	134,379	137,354	138,012	136,421	134,055	134,822	135,686	138,567
■ Students/BWS	2,371	2,941	4,695	7,547	10,127	9,381	7,870	7,267
■ Parent	4,039	4,811	4,699	4,646	4,939	4,855	5,176	5,537
■ Friends	5,831	7,614	8,736	10,449	10,710	11,654	12,502	13,287
By Member Type:								
■ Life	76,658	79,924	82,658	87,043	89,799	93,243	95,857	97,669
■ Annual (Total)	69,962	72,796	73,484	72,020	70,032	67,499	65,377	66,989
■ Annual (Paid)	53,848	56,693	56,733	55,278	53,199	50,499	47,980	48,194
■ Annual (Gratis)	16,144	16,103	16,751	16,742	16,833	17,050	17,397	18,795
Annual Alumni Retention Rates	80.0%	76.0%	78.0%	72.0%	70.0%	72.0%	73.0%	75.0%

Financials	FY02-03	FY03-04	FY04-05	FY05-06	FY06-07	FY07-08	FY08-09	FY09-10
Total Revenue (All Sources)	\$8,649,710	\$9,041,857	\$9,533,250	\$9,840,798	\$10,719,145	\$11,230,250	\$10,812,473	\$9,988,605
Dues Revenue-Annual Membership	\$1,486,482	\$1,571,423	\$1,517,157	\$1,567,283	\$1,551,193	\$1,619,767	\$1,425,822	\$1,354,477
Dues Revenue-Life Membership	\$1,219,760	\$1,105,867	\$1,098,804	\$1,418,036	\$1,450,885	\$1,493,431	\$1,252,038	\$1,005,164
Program Expenditures (Actual)	\$6,030,672	\$6,911,186	\$6,779,697	\$7,148,497	\$7,480,570	\$7,831,519	\$7,971,401	\$8,183,463
Budget Surplus/Deficit	\$190,326	(\$202,870)	\$451,230	\$415,971	\$382,186	\$211,165	\$821,551	\$12,051
Total Endowments	\$35,325,984	\$40,975,197	\$43,464,182	\$48,906,367	\$54,969,104	\$51,672,727	\$37,878,823	\$39,002,737
■ Life Member Fund	\$26,335,405	\$30,804,341	\$33,297,450	\$37,067,354	\$42,222,729	\$39,461,944	\$30,633,715	\$30,873,761
■ MOE Fund	\$5,460,424	\$6,094,789	\$6,187,916	\$6,887,861	\$7,194,004	\$6,440,399	\$4,454,170	\$4,374,848
■ Operating Fund	\$3,530,155	\$4,076,067	\$3,978,816	4,675,738	\$4,938,175	\$4,375,411	\$2,748,148	\$2,740,378
■ Student Program Fund				\$275,414	\$614,196	\$1,394,973	\$1,042,790	\$1,013,750
Investment Returns	2.0%	17.2%	9.3%	8.7%	16.8%	-6.1%	N/A	4.7%
PSAA Philanthropy to PSU	\$950,000	\$530,000	\$530,000	\$380,000	\$300,000	\$300,000	\$300,000	\$307,340

Program Connections	FY02-03	FY03-04	FY04-05	FY05-06	FY06-07	FY07-08	FY08-09	FY09-10
Overall Individual Connections				52,442	68,963	82,177	100,035	101,996
Alumni Career Services	3,400	4,072	6,013	8,245	12,854	15,669	24,429	27,352
Arts Festival Alumni Weekend Participants	223	165	269	445	463	600	586	596
City Lights Participants	N/A	N/A	436	909	1,761	537	772	1,046
Huddle Participants	248	472	531	891	1,068	1,228	1,356	1,374
Musical Theatre Tour Participants	2,679	2,113	3,556	4,320	601	405	578	2,285
Traditional Reunion Weekend Participants	875	637	584	778	758	828	786	737
	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010(YTD)</b>
Alumni Travel Participants	366	423	609	357	599	589	330	332
Travel Programs	46	45	43	26	30	31	30	32

Grassroots Network	FY02-03	FY03-04	FY04-05	FY05-06	FY06-07	FY07-08	FY08-09	FY09-10
Subscribed Members		17,716	19,244	21,120	22,196	30,352	31,010	37,181
Facebook Group Members/Fans					95	335	376	333/141*
Support Messages Sent by Members		660	1,251	2,189	574	4,989	2,734	2,289
Online Newsletter Page Views		40,025	70,028	39,739	22,305	35,998	29,077	47,055
Event Participants	85	75	76	199	403	418	534	567

\*GN Facebook Group converted to fan page in 2010.



**Nacogdoches**  
the oldest town in Texas



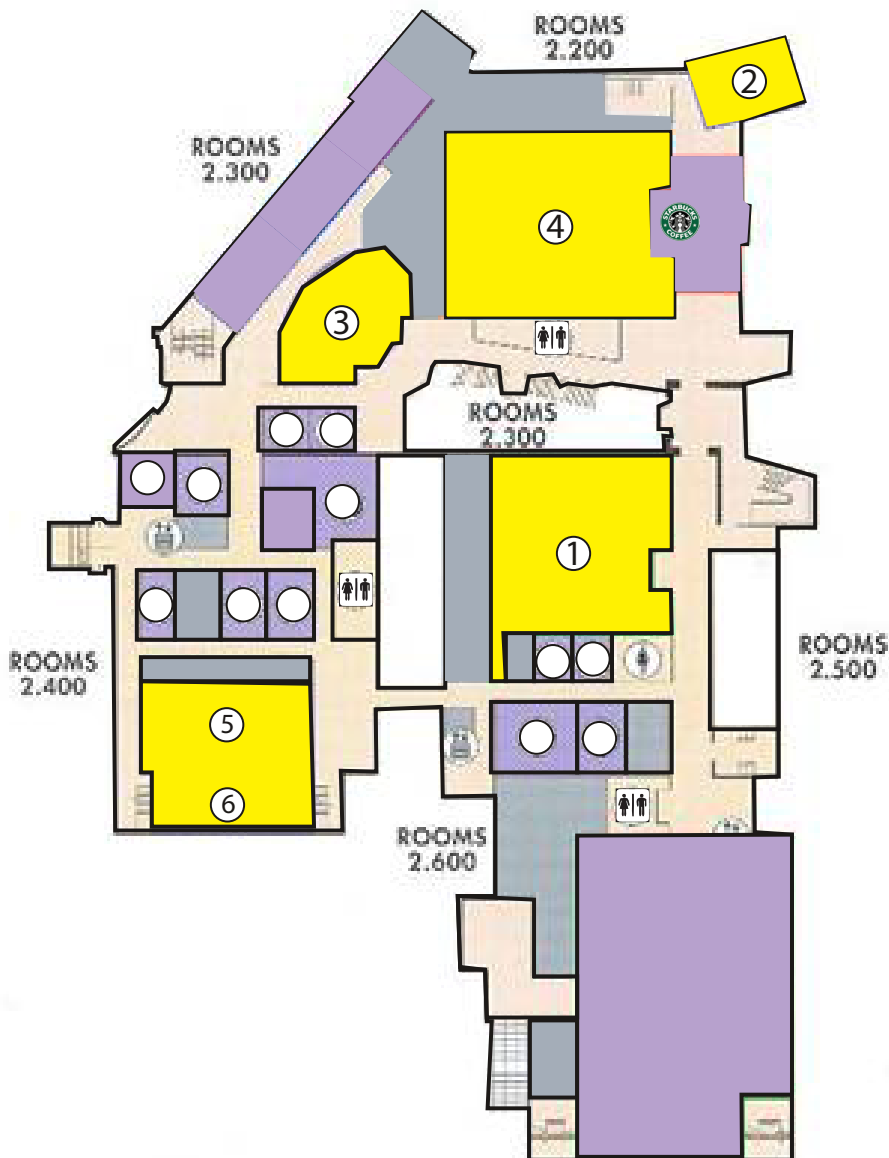
## est. 1955

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## Oak Terrace

# BPSC

## Second Floor



1. Twilight Ballroom
2. Multi Media Room
3. Tiered Classroom
4. Theatre
5. Regents Suite A
6. Regents Suite B



Starbucks



Restrooms