

Report on the Penn State Alumni Association

Board of Trustees – Committee on Outreach, Development and Community Relations

Thursday, February 17, 2022, 10:30 a.m.

Paul J. Clifford, CEO

**[Slide 1: PSAA Hang Slide]**

**[Click to Slide 2: Title Slide]**

**Thank you, Chair Doran. Good morning, everyone.  
<<And to Penn State's new president, Neeli  
Bendapudi, on behalf of our more than 700,000  
alumni worldwide, welcome.>>**

**[Click to Slide 3: Hintz Photo]**

**I appreciate this opportunity to announce an  
exciting shift in the Penn State Alumni  
Association's membership model. It's a shift that  
will improve the alumni experience for Penn  
Staters everywhere, enabling the association to  
better serve our alumni and friends, while also  
allowing our affiliate groups to focus on engaging  
with local alumni.**

**[Click to Slide 4: world map + membership #]**

**Today, with more than 171,000 members, we are the largest dues-paying alumni organization in the world. For many alumni and friends, membership in the Alumni Association is the primary point of contact for a lifelong relationship with Penn State. By enhancing the member experience and reducing barriers to engagement, we can sustain and build on that success for the organization and the University community.**

**[Click to Slide 5: July 1, 2022]**

**So, effective July 1, 2022, the Alumni Association is adopting a one-membership model, and moving away from the layered membership model that is often confusing for alumni.**

**[Click to Slide 6: types of affiliates]**

**Since 1898, when graduates in Pittsburgh formed the Alumni Association's first local chapter, our network of affiliates has grown to include 280 groups, including Alumni Interest Groups, the Alumni Societies, Alumni Program Groups and our local chapters. These groups have a**

tremendous impact. One indicator of that impact is their scholarship and program endowments, which now have a market value of more than \$24 million dollars.

**[Click to Slide 7: groups of distinction slide]**

Currently, membership in any of our 123 local chapters is separate from membership in the Alumni Association. This system of separate memberships with separate dues makes us less efficient as an organization, but even worse, it inhibits broad engagement and creates confusion among the individuals we serve.

**[Click to Slide 8: recent alum bombarded with "join" messages]**

Consider a recent graduate who started at Penn State Altoona, graduated from the College of Engineering at the University Park campus, and recently relocated to Philadelphia. She'd like to stay connected with Penn State, her engineering program and the Altoona campus. She'd also like to meet fellow Penn Staters in the Philadelphia

area. Should she join the **Alumni Association**? Or would it make more sense to join the local chapter? The choice becomes even more difficult when she learns that Association **membership** includes access to some affiliate groups, but not all.

**The** real question is, why is this so complicated? Staying involved with Penn State should be simpler.

**[Click to Slide 9: Recent grad with 1 Join Us and Get Involved message]**

And starting this summer, it will be, because engagement will be brought together in one **Alumni** Association membership. This is the right thing to do because it puts our alumni and friends first. We are making it **easy for every** graduate to engage with the University's incomparable alumni network where and when they wish.

**[Click to Slide 10: photos of local chapters displaying unique characteristics]**

This shift will *not* change the local **character** of our chapters, or their freedom to operate in an

**interdependent way and make decisions at the local level, just as they currently do. However, it will benefit them in several ways. First, it will free chapters to do what they do best—engage local alumni. Volunteer leaders will no longer need to devote resources to collecting dues and other tasks that also are performed by the Alumni Association.**

**[Click to Slide 11: engage more alumni]**

**In addition, chapters will be able to engage even more alumni and friends. That's because, under the current model, the majority of Alumni Association members miss out on connecting locally. More than 150,000 alumni and friends engage with us as association members but don't join their local chapter. In July, that barrier to local participation will be removed.**

**[Click to Slide 12: local leader w/bullet points]**

**Over the past two-plus years, we consulted with our Alumni Council and local volunteers, and engaged in ongoing conversations, brainstorming, discovery sessions, and planning. Volunteer**

leaders overwhelmingly support this change. Many expressed relief about eliminating local dues. They are looking forward to focusing on what alumni and friends want to see in their back yards.

**[Click to Slide 13: technology]**

Behind the scenes, however, this transition requires detailed attention to change management, an investment of resources and support to affiliate groups, enhanced technology, and more. A cross-functional leadership team is planning and implementing the transition. Volunteer participation remains key, and their feedback continues to inform every aspect of this change.

**[Click to Slide 14: bullet items in runup to July 1.]**

In the runup to July, we are coordinating with chapters and communicating with members. We are renewing our volunteer training and support programs and implementing new support models for our groups. We're redesigning our processes to create great experiences for our members.

**[Click to Slide 15: technology stack components]**

To deliver those experiences, we are implementing a multifaceted enterprise technology stack, which includes email and marketing automation capability, event management, enhanced benefits, fundraising support, and a web solution. Vendor evaluation and selection, involving multiple RFPs, has taken a year and is nearly complete.

Some components, like a new discount benefit platform for members and a new digital asset management tool, should go live this spring, with others to follow sequentially.

**[Click to Slide 16: University Park campus photo.]**

This is particularly exciting because the way we deploy this critical technology in the Alumni Association could serve as a model for improving stakeholder engagement across the University. This aligns with the University's strategic plan, which calls for keeping you engaged throughout your lifelong relationship with Penn State.

**[Click to Slide 17: local group activities]**

**But serving our alumni is what matters most. Our new membership model will vastly improve alumni experiences by providing a single point of access to all the ways they want to be involved.**

**[Click to slide 19: PSAA Hang slide]**

**We couldn't be more excited about this change, and we look forward to updating the committee and the board on our progress as we better serve and connect Penn Staters to each other and the University.**